

2014

## Professional Educators of Iowa member perspectives about Iowa State Education Association and National Education Association membership and political activities

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PROFESSIONAL EDUCATORS OF IOWA MEMBER PERSPECTIVES ABOUT  
IOWA STATE EDUCATION ASSOCIATION AND NATIONAL EDUCATION  
ASSOCIATION MEMBERSHIP AND POLITICAL ACTIVITIES

An Abstract of a Dissertation  
Submitted  
In Partial Fulfillment  
of the Requirements for the Degree  
Doctor of Education

Approved:

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Dr. Nicholas Pace, Committee Chair

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Dr. April Chatham-Carpenter

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Melissa Kay Reade  
University of Northern Iowa  
December, 2014

## ABSTRACT

As Moe (2011) contended, “The teachers unions have tremendous influence over the nation’s schools, yet they have been poorly studied” (p. 18). The purpose of this mixed-methods study was to examine the attitudes, beliefs, and values of current Professional Educators of Iowa (PEI) members who either opted to join, discontinue, or bypass membership with Iowa State Education Association/National Education Association (ISEA/NEA). Specifically, this study aimed to understand the factors that influenced their membership decisions. Lastly, this study further explored the degree to which former ISEA/NEA members were aware, involved, and aligned with NEA political activities and how the political activities impacted membership choices.

A mixed-methods approach proved best to meet the goals of this study. With an interest in gathering statewide perspectives about PEI members’ previous experiences related to ISEA/NEA, two focus groups, as well as a pilot survey and cross-sectional survey were incorporated. A total of 708 Iowa educators participated in this research.

The results of this study indicated there were many factors for joining ISEA/NEA, including liability protections, pressure to join, the belief that they had no choice, the belief that joining “is just something you do,” and to support local union efforts. Factors for bypassing and discontinuing ISEA/NEA membership emerged, including cost of membership, political activity, allocation of dues, preference for an alternative organization, and a focus on non-education issues. Additional findings suggested that former ISEA/NEA members were largely not aware, involved, or aligned with ISEA/NEA political activities. A new framework was introduced, entitled The Model of Decision Making. This model emerged from and best summarizes the findings and implications in this study.

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Dr. Nicholas Pace, Chair

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Dr. Dennis Clayson, Committee Member

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Dr. Rodney Dieser, Committee Member

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Dr. Dewitt Jones, Committee Member

Melissa Kay Reade

University of Northern Iowa

December, 2014

Dedicated to our four children. May my 22 year educational journey inspire them to dream big, reach for their goals, be willing to sacrifice, and persevere despite life's obstacles.

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## CHAPTER 1

### INTRODUCTION

#### Roller Coaster Ride

As a fresh college graduate with my first bachelor's degree, I chose to work in the mental health field. It was at this time that I had my first association with a labor union. Naively, I did not know that unions existed outside of labor markets and I was surprised that as a young professional, I would have the option of joining a union.

The local union leaders did their best to recruit me as a potential new member. When initially approached, I asked why I should join. "Protection from the bosses" was the initial response. My favorite response from a union steward, however, was, "You can get cheaper Adventureland tickets." As much as I enjoy theme parks, that was not enough of a reason for me to join the ranks of the union. Although I opted out of the union, my position remained within the union collective bargaining unit.

This started an unpredictable ride for me that included frank interactions, studies, and advocacy related to unions in both the health and education fields. After a short time in the aforementioned position, I moved to an administrative role within the same health-care organization. This new role opened my eyes to the ever-present but behind-the-scenes administrative efforts to stifle the union through contract infringements, lack of communication, or a lack of consideration for fellow employees.

On the other side, I also witnessed union tactics such as protections of poor performing employees, baseless grievances, and contractual rigidity. What I perceived as an adversarial, us-versus-them approach left me believing both the administration, as well

as union leaders focused primarily on preserving their self-interests. Reflecting back, I wonder if both entities were a hindrance to improvement in a stifled, struggling organization that had a mission to serve the health needs of people.

After three years, I moved on to what I assumed would be a more professional environment— K-12 education. I accepted a position administering a grant in a rural Iowa public school district. This position afforded me refuge from the jockeying between union and administration. As a curious by-stander, I experienced a prime opportunity to examine how both groups contributed to the relationship and climate from a neutral position. I developed strong friendships with both teachers and administrators and had the opportunity to listen to both sides. The teachers' union and administration relationship was not as adversarial as I had witnessed in the mental health field. If tension existed within the school climate however, the two could easily sway from the respectful, collegial relationship.

I recall one frank conversation with the union president, "Betty." The budget was in question and administrators were informally proposing different ideas to help alleviate the budget concerns. Without a doubt, the proposal of actions would impact all facets of their school district, but none more so than the teachers. Betty read the remarks she planned to share in the upcoming public meeting to me- words that I perceived as harsh and uncalled for, targeting the superintendent. Oddly, our superintendent was highly respected and trusted, and the two of them were good friends.

When I expressed concern about the language she used to target the superintendent and its likely implications, she agreed, but also said, "As the union

president, they [union leaders and members] *expect* me say things like this. It's part of my job." At my urging, Betty agreed to take a more measured response with her comments in the public meeting— satisfying the membership by speaking out on their behalf, but also maintaining credibility by focusing more on the issues and less on the personal attack.

Another example that comes to mind concerns "Mandy," an outstanding teacher leader in a rural Iowa district. Mandy belonged to the teachers' union for 12 years and told me she joined because of liability and local collective bargaining services. However, she felt compelled to distance herself from union leaders when they mounted personal attacks on administration or school board officials, initiated unreasonable offers through collective bargaining, or encouraged members to align politically to a candidate or party. These types of tactics made her uncomfortable. I grew to believe that many people like Betty and Mandy, quality and well-intended educators, felt professionally torn. On one hand, they honored the expectation to join the teachers' union, but on the other, they were uncertain the union stances and actions accurately represented their interests.

Despite the occasional harsh words and the prevalent tension between the teachers' union and the administration, I knew that I wanted to stay in education. I hustled through another bachelors' degree in elementary education. As a non-traditional undergraduate, I experienced numerous plugs from Iowa State Education Association (ISEA) representatives and professors alike to join the ranks of ISEA. Although I elected not to join ISEA, many of my colleagues did.

I found my first teaching position in a highly unionized suburban district. In fact, the union hub was located in the building in which I taught. The initial gentle invitations to join the union spun into prodding, insistence, and repeated and more aggressive attempts to recruit me. Although I technically had the option not to join, I perceived there was an expectation that all teachers should join. I later learned that I was the only non-union teacher in the building.

After a month of recruitment door knocking, emails, and phone calls, I drew up a list of eight questions that were plaguing me about union membership, politics, and dues. I declared boldly to the last union representative who visited, “When someone wants to sit down with me and answer these eight questions, I will be happy to consider [membership]. Right now as a new teacher, I have nothing to prove to you. You need to prove to me over the course of the next year why I should join.” Agreeably, the union representative indicated she would have a union leader contact me about answering my questions.

Those questions centered on how unions affect local and state education, as well as the union’s educational priorities. I also wanted to get at the hot button issues, such as use of dues, the nature of political endorsements and party affiliation, Political Action Committee (PAC) activity, legal representation, and the degree and type of affiliation ISEA had with the National Education Association (NEA).

Within a few short days, a teacher with rank in the local, state, and national in the teachers’ unions presented himself. The ISEA representative answered my questions, but I was convinced he did not provide anything other than what he thought I wanted to hear.

For example, it was important for me to know the endorsed political candidates, their party affiliation, and the grounds for endorsement. I believed his responses indicated a more politically neutral stance than my research suggested.

In the end, I elected not to join the teachers' union. My colleagues, considered "rank-and-file" members, thought nothing of me opting out of the teachers' union and we continued to have a great working relationship. However, the union leadership appeared to feel differently. To my surprise, the union did not attempt to educate me further about the benefits of joining, or communicate with me at all in a formal manner after this discussion. I soon felt perplexed, as it became clear to me that I was cut off from all potential information that could have given me the impetus I needed to join.

After this experience, I grew to believe several things about the teachers' union. First, from the perspectives of union leaders, an informed populous was a dangerous populous. Second, questioning in general and the nature of those inquiries were perhaps unwelcome by union leaders. Lastly, those who chose not to conform, were not like-minded, or shared dissenting viewpoints, would likely not be embraced by the union.

#### The Union Alternative

Despite not joining ISEA, I valued the opportunity to be part of a professional organization for teachers. Although it seemed as though the teachers' union was my only option, after talking with one of my education leadership professors at the local university, I learned of an alternative organization for Iowa teachers. Professional Educators of Iowa (PEI) is an association for teachers and administrators, focused on state-level educational issues agreed upon by the majority of membership, without regard

for political party alignment. Typically, teachers who belong to PEI do so as an alternative to the teachers' union and resonate with the stances on educational issues that PEI supports (J. Hawkins, personal communications, February 6, 2012).

Certainly, those same educational issues resonated with me. When I joined PEI in 2006, a central issue that PEI focused on was the Fair Share legislation. Fair share “requires that all employees in the particular bargaining unit who are covered by the collective bargaining agreement must pay their ‘fair share’ of dues to the union” (National Education Association, 2012e). Various aspects of No Child Left Behind were also of significant focus to PEI members. Additionally, an issue with much attention paid at the time of this writing in 2012, includes the education reform bills in the legislature.

After talking with PEI members and conducting further research about PEI, I elected to become a member. Several aspects of membership appealed to me. I appreciated PEI's willingness to regularly survey and listen to members about priority issues that would guide PEI advocacy in *Iowa* education, not nationally. The opportunity to belong to an organization that welcomed camaraderie, rather than the division I observed in the teachers' union between teachers and administrators, appealed to me. The ongoing information provided about the issues in Iowa education policy enacted in the Legislature also mattered to me. PEI's core beliefs also resonated with me, especially its focus on students. In addition, I appreciated the focus on professional negotiations and their desire to move away traditional labor tactics. However, there was no single more important issue to me than that of Right-to-Work.

Prior to my PEI membership, my awareness and concern grew about the repeal of Iowa's Right-to-Work (RTW) laws with what was commonly referred to as Fair Share legislation. Through my membership with PEI, I learned far more. Fair Share legislation suggests that collectively bargained union agreements may require all eligible non-member employees to pay their "fair share" of union dues under the notion that all are benefitting from the work of the union. Fair Share advocates believe reasonable fees to cover mandatory union representation or grievances are permissible for those who are in a collective bargaining unit (Holger & LaJeunesse, 2003). Opponents of Fair Share however, believe freedoms are stripped from individuals, with the discretion of union membership and dues held by the legislature and unions.

According to the National Right-to-Work Legal Defense Foundation (2011), a nonprofit organization dedicated to curbing compulsory unionism, RTW laws "secure the right of employees to decide for themselves whether or not to join or financially support a union." Essentially, an employee has the right *not* to belong as a condition of employment. In a RTW state, proponents believe individual freedoms are afforded, with the discretion of union membership held by the employee. Because of RTW, I had the option of deciding whether I wanted to join a union.

The very thought that my freedom to *not* belong to a union could be stripped from me as an American citizen infuriated me. I very much shared the sentiment of a Washington State teacher who said, "This battle is about freedom. Teachers simply want the freedom that all other Americans enjoy- the freedom to associate with people who

share their values, and the freedom to have their hard-earned money support candidates and issues they believe in” (Richards & Harsh, 2004, p. 8).

Undoubtedly, this focus on RTW began to confirm my own core values and drove several personal actions in the coming months and years. First, I became an advocate for RTW, contacting legislators regularly. I had many frank conversations and written communications with state leaders who were determining the fate of the state as the RTW versus Fair Share battle ensued.

Second, as a teacher, stepping up into leadership roles was innate. I completed my Masters in literacy education and intended to take a break from furthering my education. However, I knew I would eventually move into an administrative role after completing an education leadership program. The threat of Fair Share was the impetus I needed to continue my studies with a focus on education leadership. Again, being a school leader was always my intention, but I also saw the value of having a strategic “out” from the teachers union if indeed Fair Share legislation replaced RTW.

Lastly, although the formal communications with union officials had halted, I still had many informal interactions with both union and non-union members alike. These conversations were often positive, informative, and enlightening and ultimately are what spurred my intentional journey of exploration into the teachers’ union.

### New Insights

Throughout my principalship program and my doctoral work, I began researching the teachers’ union. My experiences and the biases that resulted came through clearly to professors at the university. They encouraged me to explore the other side of the issues



about which I had grown passionate. This exploration confirmed my prior conceptions, but also allowed me to get at the heart of why labor unions emerged in the United States and in the field of education— both were issues I had not previously examined.

I became more aware of the early intentions of the labor movement to provide safeguards and improved working conditions for American workers. I also better understood how labor's advocacy transformed education with the intentions of improving public schooling and reducing the mistreatment of school teachers and children. While I concluded there was no doubt that teachers' unions played an integral role in the advancement of public education early on, I still questioned whether the teachers' unions had indeed evolved with the needs of the profession, and more importantly the needs of the American students.

It was not until my principalship that I gained exposure to a positive working relationship between union and administration. I expected more of the "us versus them" mentality from both sides. However, a newly hired superintendent in the district made these kinds of relationships in general a priority and he worked tirelessly to forge common ground with union leadership. Although it took time, open communication, clear intentions, and compromises paved the way for smooth operations and a trusting relationship between the two entities. In contrast to my earlier experiences, exposure to this type of experience shed light for me on the possibility and the need for both administrators and union leaders to embrace a common willingness to work toward betterment together.

Even ten years after starting my journey in the profession of education, I come across educators who I have deep respect for that really do not understand why they belonged. A notable story involved a teacher named Sharon who had been in the field for about 10 years. We had worked together for some time, but I did not know her history in terms of teacher union membership and she did not know about my dissertation focus on the teachers union. When I mentioned my dissertation focus, she in turn mentioned she had previously been the president of her local teachers union. When we dove further into discussion about the political aspects of the teachers union she admitted she had no idea how money was spent by ISEA/NEA on political activities- and she was a leader of the local union. She said, "I'll have to check into that."

I noted in my informal conversations with respected educators and colleagues, that in contrast to the pointed questions I had asked as a prospective recruit, most colleagues seemed to take a laissez-faire approach to understanding the entity representing them. Most of my colleagues belonged to the local, state, and national teachers' union. To me, the disheartening part was not that they belonged, but that many did so while seeming to lack a clear understanding of how those affiliations were representing their personal interests and how their hard-earned money was being spent.

Many of my colleagues admittedly joined the union out of obligation, because "it is just what you do" as a teacher. Others joined for liability coverage and financial incentives, such as cheap Adventureland tickets. Some joined because they did not want to make waves by not joining in a building with a self-reported 100% membership. Notably, some teachers joined because they believed it would help them be a better

teacher. I understand these rationales, and considered them myself during the recruitment period.

Regardless of their reasons for joining, my experiences led me to believe that very few of the rank-and-file members, and even local union leaders, really understood or cared how the union represented the average member politically, or how their dues were allocated within the union hierarchy to advance the platforms of the teachers' union. It became apparent to me that very few educators, apart from union leaders, were informed consumers about the political platform of their teachers' union.

I wondered how many of the teachers researched the teachers' union and how many were merely content to trust the information provided to them. It seemed as though many teachers with whom I had conversations did not know there were partisan and divisive issues endorsed on their behalf that had little direct correlation to public education. This lack of awareness and concern by teachers about the very entity representing them piqued my curiosity.

### Background

The focus of this study relates to ISEA and NEA political activities and significant background about the two entities will be provided. However, because the participants in this study were current Professional Educators of Iowa (PEI) members, it is first important to provide insight into both Iowa's political climate and the PEI organization.

### Iowa's Political Climate

The context for Iowa politics is essential to highlight, given the focus of this study. As such, a brief overview will be provided. Although Iowa has only six electoral votes, much fanfare is paid to the Iowa political scene. This is largely due to Iowa's caucus system, the first of any formal caucus or primary activities leading up to a general presidential election in the nation. The caucus is the system in place to select delegates for the state convention (City Data, 2010; Cohen, 2012; *Des Moines Register*, 2012).

But another reason for the heightened fanfare in Iowa is due to its more recent status as a swing state. Historically Iowa leaned Republican, but since the 1980's has tended to lean Democratic. That said, in 2008, there were a higher percentage of Democratic voters registered, but in 2012 there were a higher percentage of Republican voters registered. Despite the higher percentage of Republican voters more recently, Iowa still leaned to Democratic Presidential Candidate Barack Obama for both his first term in 2008 and second term in 2012. During the 2012 Iowa Caucus, the GOP nominated Rick Santorum, a social conservative, by a slight edge over Mitt Romney, who became the GOP Presidential nominee. There are still a large number of unaffiliated voters, leaving all districts in the state up for grabs, despite political trends suggesting that eastern Iowa leans Democratic, western Iowa leans Republican, and central Iowa is split between the two (City Data, 2010; Cohen, 2012; *Des Moines Register*, 2012).

Iowa Governor, Republican Terry Branstad, who has held the office on two different occasions, is the longest serving governor in Iowa and the second longest serving governor in the United States. Congressionally, Iowa is equally represented by

one Republican and one Democratic Senator, as well as two Republican and two Democratic Congressmen. Interestingly, Iowa is only one of four states that have never sent a woman to Congress (City Data, 2010; Cohen, 2012; *Des Moines Register*, 2012).

With the observation of Iowa as a swing state, the findings above may indicate that Iowa's educators may not be as liberal as once thought. This is particularly relevant because of how ISEA/NEA has historically represented educators politically, which many would argue has been with a largely liberal slant.

### Professional Educators of Iowa

An emerging option for educator professional membership in Iowa is PEI, which is a professional organization comprised of "independent educators," including both teachers and administrators (Professional Educators of Iowa, 2011c). PEI began in 1981 with only 13 members and a focus on education-centered legislation in Iowa (Professional Educators of Iowa, 2011a). PEI considers itself a voice for educators who want an association that "does not get sidetracked by social or other extraneous issues" that are unrelated to education (Professional Educators of Iowa, 2011b, para. 3).

Today, PEI has 3,065 members with trends in membership increasing over the last five years (J. Hawkins, personal communication, February 6, 2012). PEI has great autonomy in their legislative activity related to Iowa education, as they are a sovereign body not tied to a national organization. However, PEI collaborates with other independent associations to "help each other with ideas to grow. It's a cooperative attitude" (J. Hawkins, personal communication, February 20, 2012).

Any PEI legislative advocacy is membership-driven. While PEI does not have a full-time lobbyist, when consensus emerges about education or labor issues among 75% of the members, PEI lobbies on their behalf (Professional Educators of Iowa, 2011b). PEI does not endorse political candidates, have Political Action Committees (PACs), or weigh in on non-education social issues. J. Hawkins, PEI Executive Director (personal communications, February 6, 2012), indicated that many members “talk a lot about ISEA” as a reason for joining PEI. He continued, “It’s serious business when ISEA endorses political candidates that people don’t believe in or the extraneous issues that NEA supports. ISEA has to subscribe to the national resolutions,” which will be highlighted in the upcoming sections. Golden (2004) confirmed that many teachers are drawn to non-union organizations because of their disapproval of the NEA’s politics.

#### Iowa State Education Association

Iowa State Education Association (ISEA) is a teachers’ union and the state affiliate of the National Education Association (NEA). According to ISEA, “Everything we do... is designed to promote and support quality education” (Iowa State Education Association, 2011b). Although specifics on the number of affiliates and members are not exact, ISEA officials provided estimates. There are “around 410 to 420” local affiliates within Iowa, according to D. Gosselink, ISEA Membership Director (personal communication, February 6, 2012). However, it is important to note that there are 359 public school districts in Iowa (Iowa Department of Education, 2012a) and that the remaining locals may be part of the Area Education Agency system.

Gosselink (personal communication, February 6, 2012) went on to suggest that there are “around 30,000 members” and that “roughly 27,000” are active teachers and “about 2,400” are support professionals. However, follow up communication with Coy Marquardt, ISEA Student Program Organizer, indicated that ISEA has “about 28,000 teachers [and] 4,000 support professionals” (personal communication, February 10, 2012). It is important to note that membership to ISEA is accompanied by mandatory membership to the NEA. The unification rule passed in the mid-1970’s prohibited members of a local or state union to opt out of the NEA (Aldridge-Sanford, 2006). When one considers that these 27,000 or 28,000 teachers represent 75% of the 36,000 teachers in Iowa (Iowa Department of Education, 2012b), this confirms the very powerful influence ISEA has in Iowa’s education.

While the majority of Iowa teachers belong to ISEA, membership continues to decline (J. Gosselink, personal communication, February 6, 2012). Gosselink initially attributed the decline to the number of teachers decreasing in the state. He then expanded his rationale for the decline, saying, “It’s all over the board. Some leave because they are joining that other group- PEI. Some leave because of financial reasons like the cost of dues. And some disagree with the beliefs that are promoted by ISEA.” These beliefs promoted by ISEA closely mirror the NEA’s stance on social, political, and legislative issues.

ISEA has its own Political Action Committee (PAC), which endorses political candidates in the state. ISEA-PAC is one of the largest PACs in the state of Iowa (Thornton, 2010). “Through [their] political action arm, ISEA-PAC, union members

interview candidates about their views on education-related issues, issue recommendations on which candidates are most supportive of public education, and work to help get ‘pro-education’ candidates elected” (Iowa State Education Association, 2011c, p.13). According to B. Hudson (personal communications, February 13, 2012), ISEA’s Government Relations Specialist, 60% of ISEA members voluntarily contribute to ISEA-PAC. Notably, the 2014-2015 ISEA/NEA Membership enrollment form reflects the following statement, “Included in your membership total is a \$15 voluntary contribution to ISEA PAC” (para 1). Members who opt not contribute to ISEA PAC must opt out on the enrollment form or they will be contributing automatically to ISEA PAC (Iowa State Education Association, 2014).

ISEA also has a full-time lobbyist at the Iowa Capitol working on education issues (ISEA, 2011d). Additionally, the ISEA plays an influential role in the national political scene, as the NEA Fund PAC, “never recommends or endorses a candidate for federal office without the support of State Association leaders” (Iowa State Education Association, 2011a, para. 3). It is important to distinguish that while ISEA members must also join NEA as condition of ISEA membership, ISEA members optionally contribute to the ISEA-PAC and the NEA-Fund. Although both ISEA-PAC and NEA Fund focus on political activity, they do so at the state and national levels respectively.

To understand the effectiveness of ISEA’s political action activities, it is necessary to examine the amount of revenue generated and spent supporting candidates. During the 2008 election cycle, ISEA PAC spent \$574,000 and supported Democratic candidates 99% of the time, with the other 1% focused on a ballot initiative. While during



the 2010 election cycle, ISEA PAC spent \$503,000 and supported Democratic candidates 100% of the time (Follow the Money, 2012; Iowa Ethics and Campaign Disclosure Board, 2010).

While ISEA reports that political action is funded by voluntary contributions (Iowa State Education Association, 2012), Goal I of the dues allocation specifies that member dues will be used for “lobbying the State Legislature, administrative agencies, and the Congress; collecting and disseminating information on education and candidates for public office” (Iowa State Education Association, 2011c, p. 17; Iowa State Education Association, 2013, p. 17). This implies that many political related activities, such as funding the full-time lobbyist, political candidate information, and endorsements are indeed funded by membership dues.

Another aspect of membership dues expenditures requires further examination. This relates to ISEA UniServ staff. UniServ is short for Unified Service. The UniServ staff “provide a wide range of specialized programs and services for members... They are on call to help with individual contract problems, negotiations, membership development, political action, or training activities” (Iowa State Education Association, 2011c, p.7). ISEA has expressly indicated a priority for UniServ staff to engage in political action, knowing membership dues fund these positions.

The 2008-2009 financial reports indicated that revenue generated by the ISEA from dues was \$12,608,093 (Education Intelligence Agency, 2010; Political Calculations, 2011). Notably, \$9,435,891 of those dues collected were allocated for employee compensation, which is 75% of the total revenue (Political Calculations, 2011). Table 1

provides a synopsis of the budget priorities of the ISEA and represents the use of ISEA dues from one member. The inability to separate the ISEA programmatic activities from the political activities is evident. Both of the above examples counter their claim that all political activities are funded by voluntary contributions to the ISEA-PAC.

Table 1

*How ISEA Allocated 2013-2014 Membership Dues*

Allocation of 2013-2014 ISEA Dues	Dollar Amount	Percentage of Dues
Goal I: Development of education and its professions	\$66.53	13.0
Goal II: Provide program support for members and affiliates	\$296.52	61.0
Goal III: Advocate the interests of members and affiliates	\$37.98	8.0
Goal IV: Involve members in the internal democratic processes of the Association	\$19.80	4.0
Goal V: Provide business administration necessary for the operation of the Association	\$68.17	14.0
<b>Totals</b>	<b>\$489</b>	<b>100%</b>

Source: 2013-2014 ISEA Member Resource Guide

National Education Association

The two predominant teachers' unions at the national level are the American Federation of Teachers (AFT) and National Education Association (NEA). While both

organizations are equally important in education, and the intertwined history of the two are highlighted in Chapter 2, the NEA will be the predominant focus in this study as the parent organization to the Iowa teachers' union, ISEA.

Formally named “The National Education Association of the United States” (National Education Association, 2011e, p.117), NEA considers itself to be the “voice of education professionals,” at the national level (National Education Association, 2012b, para. 1). Core values that the NEA touts include equal opportunity education, just society, democracy, professionalism, partnership, and collective action (National Education Association, 2012b). Outlined in the organization’s Preamble, the NEA intends to,

Advance the cause of public education for all individuals, promote the health and welfare of children and/or students, promote professional excellence among educators, gain recognition of the basic importance of the teacher in the learning process and other employees in the educational effort, protect the rights of educational employees and advance their interests and welfare, secure professional autonomy, unite educational employees for effective citizenship, promote and protect human and civil rights, and obtain for its members the benefits of an independent, united education profession. (National Education Association, 2011e, p. 117)

As evidenced in the Preamble, the NEA has broadened its focus beyond public education. The NEA is the largest labor union in the United States and claims just over 3 million members (National Education Association, 2011d), as compared to the second largest labor union, Service Employees International Union, with 2.1 million members. However, NEA’s membership numbers are in dispute. The NEA 2013-2014 Strategic Plan reflects modified membership at 2,410,200 full-time members and of those, 1,685,000 are “active teaching professionals” (National Education Association, 2013b).

The NEA has amassed a wealth of followers, money, and opinions, as well as vast political clout. As Cameron states, “One of the primary reasons for the existence of teachers’ unions in America is to offset the political nature of the education enterprise... Education is an integral part of the American education political milieu” (2005, p. 143). Cameron goes on to say, “Teachers more than anyone know that almost everything that touches them has a string attached that leads to a school board, legislature, congress, a mayor, a governor, or an American president” (p. 146). The NEA leaders believe there is no way to separate politics from education and as such, have built an arsenal of political power to combat any union and public education critics. From their multi-tiered political structure and political party relationships, to platform resolutions and organizational affiliations, the NEA has an interesting story that paints a portrait of an organization striving to be the nation’s education leader, while promoting a progressive agenda that many believe has nothing to do with education.

A quick glimpse into the political stature of the NEA reflects an organization capable of donating multi-millions to political campaigns, endorsing political candidates, and unprecedented lobbying (Coulson, 2010; Troy 2004). In 2010, the NEA collected dues and fair share fees slated at \$362,480,000 (United States Department of Labor, 2011a). With significant funding and through development of a Campaigns and Elections unit, NEA Fund for Children and Public Education PAC, a Super PAC, and state affiliate political support, the NEA is ranked as the single most powerful interest group in the United States (Moe, 2006; Moe, 2007; Purpel, 1993).

Further reinforcing their political stronghold is the NEA's documented ties with the Democratic Party (Clark, 1980; Federal Observer, 2012; Glenn, 2008; Honawar, 2008; National Education Association Fund, 2012a; Paige, 2006; Pioneer Institute Public Policy Research, 2009; Richards & Harsh, 2004; The Kamber Group, 1997; United States House of Representatives Education and Workforce Committee, 2002). Additionally strengthening their position in education are ties and monetary support to progressive organizations outside of education (Lieberman, 1997; Myers, 2007; National Education Association, 2011e; Paige, 2006; United States Department of Labor, 2011a; *Wall Street Journal*, 2006).

The NEA also has an ambitious and wide-ranging agenda that transcends what goes on in classrooms. Expressed in the *2013-2014 NEA Resolutions*, this agenda reflects the NEA's philosophical opinions, intentions, beliefs, or positions that may call for action or may indicate support for or opposition to federal legislation (National Education Association, 2011e; National Education Association, 2013a). The *2013-2014 NEA Resolutions* lay out 365 resolutions that unarguably focus on educational issues, as well as those that appear to have no direct tie to education.

As a point of clarification for this study, it is recognized that the types of platform or resolution issues reflected by NEA represent a dichotomy. The issues may be categorized or perceived differently by individuals or groups. For the purposes of this research, non-education issues are those issues that are typically not associated with what takes place directly in a classroom or school. It is noted that said issues may have direct

or indirect relation to education in general, classrooms, and students and is up for the interpretation of the reader.

The focus of this study takes aim at the issues and political activities of the NEA that are seemingly removed from students in American schools. Concern however, lies not in their vast political power and expansive views, but in how these political activities represent the attitudes, beliefs, and values of average rank-and-file members. Chapter 2 highlights in detail the complexities and misnomers of these NEA political activities, as well as the potential disconnect for marginalized members who do not agree with the NEA's political course of action.

### Problem Statement

With a diverse membership of 2.4 million educators across the nation, it is permissible to wonder if the progressive ideology espoused in the *2013-2014 NEA Resolutions* and via documented political activity accurately reflects the views and priorities of Iowa educators— especially in the face of NEA's self-scrutiny and revelations of incongruence perceived by its members. It is equally important to wonder if the expansive platform of issues, some arguably not directly tied to what takes place in the classroom, advances the cause of public education.

As recognized by ISEA leaders, a growing number of Iowa teachers are either discontinuing membership with the ISEA/NEA or bypassing membership all together. Many in these two groups are opting to join PEI. By focusing this research on both segments of the PEI population, insights gleaned provided an in-depth perspective about

a declining ISEA/NEA membership population and those looking for alternatives to the teachers' union.

By further exploring and clearly describing the attitudes, beliefs, and values of these Iowa teachers who belong to PEI, this study has shed light on the potential incongruence between the NEA's political activities and the desires of their potential and former members.

### Purpose

The purpose of this mixed-methods study was to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aimed to understand the factors that may have influenced their membership decisions. Lastly, this study further explored the degree to which former ISEA members were aware, involved, and aligned with NEA political activities and how the political activities may have impacted membership choices.

### Methodology

A mixed-methods approach utilizing quantitative and qualitative methodology proved best to meet the goals of this study. With an interest in gathering a statewide perspective about PEI members' previous experiences related to ISEA and NEA, two focus groups, as well as a pilot survey and cross-sectional survey were incorporated.

### Research Questions

Reflecting a focus on two distinct populations, current PEI members who (1) formerly belonged to ISEA and (2) those who bypassed ISEA altogether, the following research questions framed this study:

1. What is the demographic profile of respondents who formerly belonged to ISEA?
2. What is the demographic profile of respondents who bypassed ISEA altogether and joined PEI as an alternative?
3. What were the internal or external factors that played into the decisions of PEI members to bypass ISEA/NEA membership?
4. What were the internal or external factors that led to the decisions of PEI members to previously join ISEA/NEA?
5. What were the internal or external factors that led to those same PEI members who had joined ISEA/NEA to later discontinue ISEA/NEA membership?
6. To what degree were former ISEA/NEA members aware of NEA political activities?
7. To what degree were former ISEA/NEA members involved in the NEA political activities?
8. To what degree did former ISEA members align with the NEA political activities?

### Theoretical Framework

Several theoretical frameworks influenced this study. This research considers theoretical frameworks that reflect the individual level issues of motivation, dissonance, choice, conformity, as well as social norms and organizational level influences. Collected



and analyzed data were compared against the theories listed below for a stronger interpretation.

### Cognitive Dissonance

Cognitive Dissonance Theory, first put forward by Leon Festinger (1956), stemmed from the motivational notion that individuals innately desire harmony between attitudes, beliefs, and behaviors. Dissonance, an internal conflict or a feeling of being psychologically uncomfortable, occurs when a discrepancy emerges between two psychological representations that are inconsistent with each other. Dissonance may occur as a result of logical inconsistencies, cultural clashing of norms, broader opinions influencing specific opinions, and/or past experience (Festinger, 1957).

When discrepancy occurs, it may take the form of emotions such as surprise, dread, guilt, anger, or embarrassment. Cooper (2007) suggests that dissonance has magnitude, suggesting that the more discrepant two cognitions are, the greater the magnitude of dissonance. When confronted with dissonance and these emotions, people are inclined to take action to offset the discrepancy. If they can be “persuaded that the system of belief is correct, then clearly it must, after all, be correct” (Festinger, 1956, p. 28).

McLeod (2008) further suggests that humans seek consistency in our beliefs and attitudes. This theoretical construct has been widely applied to many fields and phenomena and is true of education. For example, if someone feels pressured to do something they are not comfortable doing, such as joining an organization, they may indeed join despite the internal conflict that emerges. As many educators will attest, the

teachers' union is not hesitant to apply pressure to prospective recruits. With that in mind, it is permissible to wonder if cognitive dissonance results when members join teachers' unions.

### Cognitive Evaluation Theory

Cognitive Evaluation Theory (CET) is concerned with what influences choice. Specifically, CET is concerned with the internal and external loci of control, meaning, whether individuals feel they are in control of the choices they make versus having outside influences shape their decisions. Additionally, CET takes into consideration how external factors impact intrinsic motivation. For example, as it relates to the teachers' unions, new teachers and potential members are often encouraged to join the union and may receive a monetary reward for doing so (Deci & Ryan, 1985; ISEA 2011e). CET theorists would take into account the influence of external motivation (e.g., monetary reward) and its impact on a member's internal motivations to be involved with the union.

### Normative Social Influence

Normative Social Influence is a theory related to the notion of conformity, specifically public compliance in conflict with private acceptance of a group's norms. "Norms relate to what is commonly done, that is, what is normal— or to what is commonly approved of— that is, what is socially sanctioned" (Cialdini, Kallgren, & Reno, 1991, p. 202). O'Reilly and Caldwell (1985) suggested that norms serve the function of bringing control and regularity to groups. They believe it is of essence that,

The attitudes and behaviors of members be continually renewed in order to provide assurance that the group exists as a distinct social entity. Thus, groups exert pressure on individuals to conform to central attitudes and behaviors with norms acting as a mechanism to produce homogeneity of values. (p. 195)

Moreover, shifting an individual's attention to a specific source of motivation will change the individual's response in ways that are congruent with a more prominent source, such as an organization (Cialdini et al., 1991). For example, "newcomers to a group are quickly made aware of what is important, how one should feel about certain aspects of the job and what are acceptable standards of behavior... and norms are assumed to operate through socially administered rewards and punishment" (O'Reilly & Caldwell, 1985, p. 195).

This theory incorporates various types of norms. Descriptive norms imply that an attitude or behavior is common among members of a group, regardless of approval. In other words, descriptive norms reflect what *is* done (Cialdini et al., 1991). Furthermore, descriptive norms motivate individuals by promoting the idea "if everyone is doing or thinking or believing it, it must be a sensible thing to do or think or believe" (Cialdini et al., 1991). This kind of presumption often allows for decisional shortcuts when one is making a choice, as possibly in the case of joining the teachers' union.

Injunctive norms encourage conformity by implying that a certain attitude or behavior is approved of or disapproved of by a social group, promoting what *ought to be* done. As Cialdini et al. (1991) suggest, injunctive norms provide the moral rules of the group and motivate action by promising social rewards (e.g., protection and job security) and punishments or informal sanctions (e.g., harassment or being ostracized).

As it relates to this study, normative social influence provides a framework with which to examine the notions of conformity and the complacency of many members who join the teachers' union without a true understanding of the organization.

## Definition of Terms

### Collective Bargaining

Enacted in 1975, the Collective Bargaining Law, Chapter 20, Code of Iowa, is legal and optional for all public schools. Collective bargaining consists of negotiations between an employer and a group of employees that determine the conditions of employment (Iowa Department of Administrative Services, 2007).

### Fair Share

Fair Share suggests that collectively bargained union agreements require all eligible non-member employees to pay their “fair share” of union representation under the notion that all are benefitting from the work and protection offered by the union (American Federation of Teachers, 2008; Herman & Herman, 1998).

### Iowa State Education Association

Iowa State Education Association is a teachers’ union representing public educators with the goal to “promote and support quality education” (Iowa State Education Association, 2011b). ISEA is a state-level affiliate of the National Education Association.

### National Education Association

National Education Association (NEA) is a national level teachers’ union representing public educators with the aim of “advocating for educational professionals and uniting members.” NEA has state-level affiliations across the United States (National Education Association, 2014d).

### Political Action Committee

Political Action Committee is a political offshoot of an organization, business, political party, or labor union dedicated to utilizing solicited contributions and spending money to elect or defeat political candidates (Federal Elections Commission, 2011).

### Professional Educators of Iowa

Professional Educators of Iowa (PEI) is a non-union state association for independent educators with the stated mission of “improving education for both students and teachers.” PEI collaborates with the Coalition of Independent Educators Association (Professional Educators of Iowa, 2011d).

### Right-to-Work

Right-to-Work (RTW) laws advocate that if an employer is unionized, an employee has the right *not* to belong as a condition of employment and cannot be forced to pay tribute to the union to retain employment (Iowa House Republicans, 2010).

### Delimitations

Several aspects about the participants in this study that are worthy of noting:

1. The participants in this study are current PEI members.
2. The study did not include current ISEA/NEA members as participants, as the focus of this study related to why educators opted out of ISEA/NEA.
3. There were 3,065 prospective participants representing PEI. Of the total membership population, 23% completed the survey (N=708).
4. Study participants included 11 focus group participants and 697 survey participants.

5. The participants in this study represented a variety of backgrounds, professional experiences, political affiliations, level of education, and school size. However, 99% of the study participants were from public schools and 99% of the survey respondents were white.
6. The study included PEI members from the 2013-2014 school year only.

### Limitations

This study has several limitations. These limitations include researcher bias, generalizability of the findings, survey validity, survey construction and limitations.

First, with regard to research bias, my experiences shape how I approach this study. I come to the table with preconceived notions about the teachers' union based on my personal experiences. As J. Smith, University of Northern Iowa Educational Psychology emeritus professor (personal communication, 2009) suggested, "Every observation you have is conditioned by who you are and your experiences." Smith and Deemer also suggested, "It is virtually impossible to disentangle the descriptive from the interpretive" (2000, p. 882). Furthermore, Smith indicated "We all make judgments and take stands... The key is take them with care and concern" (1999, p. 3).

As such, I understand the importance of selecting an array of literature resources to provide an overall balanced perspective of the issues at hand. Additionally, I utilized "neutral" readers in addition to the dissertation committee who were objective about the teachers' union and who will further provide guidance with bias depicted in this study.

Second, the findings generated from this sample may not generalize to the overall population of educators or all PEI members for that matter. For example, this study takes

place in Iowa, which is identified as a Right-to-Work state. With the Right-To-Work status, educators have the option not to join the teachers' union, whereas in other states they may be forced to. That said, the results of this study may not be generalizable to those educators in states where they don't have a choice about union membership.

As Smith (personal communication, 2009) stated, "Generalizations have a short half-life," meaning short-term behavior changes ultimately limit the applicability of a generalization. This of course depends on the degree to which the sample contains the same pattern of significant characteristics as the broad population. Statistics procedures utilized may determine the level of confidence with which the findings may be generalized (Murray, 2003).

Third, there are many aspects of the survey that can be considered limitations. Although 697 respondents completed the survey, not all of them completed each question, leaving gaps in data at times. Additionally, position effects may influence how respondents answered questions, meaning if there is a multiple response list, less people may choose options lower in the list. Ballot bias may also be of concern with the survey, meaning that if a choice is provided for a question, someone will likely choose that answer. Ballot bias is to be considered when only 1 to 3% of respondents answer a certain way. Also, because surveys are self-reported forms of data collection, validity of the data is dependent upon participant willingness to respond candidly.

Lastly, validity of the data gathered may be limited to the interpretation of responses to focus group, survey questions, and open-ended responses on the part of the participants, as well as in the interpretation by the researcher.

### Organization of Study

Chapter 1 is entitled “Introduction” and presents a personal account of my background and experience related to the teachers’ union. Also included in Chapter 1 are the problem statement, purpose of the study, research questions, significance of the study, theoretical framework, methodology, assumptions, definitions, and limitations.

Chapter 2 is entitled “Literature Review,” which synthesizes the literature surrounding the labor movement in general and leads into the historical and current day perspectives of the teachers’ unions.

Chapter 3 is entitled “Methodology,” which emphasizes the design of a mixed-methods study, and aspects of both qualitative and quantitative research pertinent to this study. Additionally, this chapter focuses on recruitment of participants, methodology for data collection, instruments, and data analysis.

Chapter 4 is entitled “Findings,” which presents the research data gathered and analyzed from the focus group and surveys. Also included in the chapter, are a description of the results, as well as a breakdown of the themes and findings from the descriptive statistics.

Chapter 5 is entitled “Discussion,” which provides a synthesis of the study, by first revisiting the purpose of the study, as well as the guiding research questions. A Model of Decision Making will be introduced. Additionally, chapter 5 synthesizes the scope of the study and its results into recommendations for further study and future practice.



## CHAPTER 2

### A REVIEW OF LITERATURE

#### A Historical Perspective of Organized Labor

To best understand the evolution of the teachers' union, it is necessary to first examine the history of the labor movement as a whole. As with many events and trends in U.S. history, labor movement developments, membership, and successes ebbed and flowed with the times. This is dependent upon on industry, political ties, leadership, rank-and-file solidarity, and the economy (Masters, 1997). Time after time, union growth inevitably sparked hostility by employers, which in turn led to the dismissal of union activities, solidarity with other companies during strikes, and demands on government to take action against unions (Friedman, 2001). Union strength also fluctuated with the leanings of each new incoming United States President and Congress. Regardless of the season and the make-up of elected officials, the labor movement in the 20<sup>th</sup> and early 21<sup>st</sup> centuries most notably reflects an emergence of the working poor as an economic and political force to be reckoned with.

Labor unions are thought to associate with fields related to industry- steel, machining, textiles, auto, and electrical. However, labor unions transcend many fields, from industry to health care and education. Although the first documented unions in the United States began in the 1840's among artisans, the late 1800's and early 1900's brought about the rights for laborers to organize on a larger scale (Troy, 2004).

### The Age of Industrial Violence

The need to protect American workers on the job promulgated the growth of labor unions. As a nation that tripled its manufacturing, advanced technology, exploited workers, and allowed unregulated work place environments, there was an overt lack of regard for the laborer in the United States (Yates, 2009). When accidents occurred, workers and families were often provided little or no compensation, leaving only the option of suing their employer.

An overwhelming number of collective and individual tragedies occurred that defined the early industrial era. In the first *Annual Report of Massachusetts* in 1870, the authors stated, “There is a peril to life and limb from unguarded machinery, and peril to heal from lack of ventilation, and insufficiency of means of escape in case of fire” (U.S. Department of Labor, 2011b). Between 1870 and 1920 alone, 70,000 coal miners and 86,000 railroad workers died on the job. As a result, laborers were viewed with sympathy because of their atrocious working conditions. With good reason, this period in labor history was known as the “Age of Industrial Violence” (Zieger & Gall, 2002, p. 19).

The iron-works, steel, and chemical industries were considered the most deadly for workers and had the least protection of all industries. Factory buildings were not equipped with the necessary safety and ventilation equipment to protect workers. With repeated exposure to toxins, high temperatures, gasses, corrosive liquids, and explosives, workers literally risked their lives.

A most notable tragedy occurred in 1907 when 354 coal miners in Monongah, West Virginia, perished at the Fairmont Coal Mines after an explosion. The mines,

considered the best in West Virginia, had just passed a safety inspection. However, the lack of safety in the mines should not have been a surprise. As a precursor of what was to come in Monongah, 252 other miners died in seven different West Virginia mining accidents in the preceding year (West Virginia Division of Culture and History, 2011).

Another horrific and prominent labor tragedy occurred in 1911 at the Triangle Shirt Company. The company experienced a legislation-altering fire, in which 146 immigrant women died. The ninth floor exits, illegally blocked by employers, led the women to succumb to the fire or jump to their deaths. This incident was later dubbed the “torch that lighted up the industrial scene” (Roberts, 2011, para. 4). Within days, the Triangle incident inspired 500,000 people to march in New York City. As a result of these demonstrations, the state formed the Factory Investigating Commission. This Commission worked to improve protection for workers in all industries (New York State Archives, 2012).

These violent incidents lingered in the memories of the American laborers. As a result of the abhorrent work conditions, union growth accompanied the restructuring of the industrial era. The American Federation of Labor grew from 300,000 to 4,000,000 in less than 20 years (Richards, 2008).

However, adults were not the only victims of violent and unsafe working conditions. Child labor spread widely during the late 19<sup>th</sup> and early 20<sup>th</sup> centuries in agriculture and industry. Not only did a concern exist of young children working,

overwhelming evidence indicated that children were treated inhumanely, with their welfare and safety neglected. Physical and verbal abuse were commonly experienced by children.

The expansion of public education and technology advancements played its part in minimizing child labor (Needham Public Schools, 2011). Widespread child labor largely disappeared by the 1930's (Whaples, 2004). That said, many attribute the shift away from child labor to union growth, successfully organized social pressure, advocacy, and enacted protection laws.

#### The Progressive Era (1900-1917)

Through the Progressive Era, expansive reforms and labor champions like President Theodore Roosevelt had a substantial effect on work safety. Legislation passed related to workers' compensation and workplace safety measures (Zieger & Gall, 2002). Early attempts to address work conditions included establishing a limit on 12-hour days, banning night work, providing adequate clothing protections, increasing ventilation, fencing off machinery, and decreasing crowded conditions. The movement of worker protection gained steam in individual states and led to an increase in investigations, enforcement, compliance, and reporting. However, without national laws protecting workers, the degree of variability and follow through among states left much to be desired, as the expectations for industry sorely exceeded performance with regard to safety (Friedman, 2001).

### The First Red Scare

The general public had sympathy for laborers and the risks they took to provide for their families. However, concerns of communism, rebellion, and militancy emerged and began to shape the way outsiders looked at laborers. They also worried their comfortable way of life would be threatened by radicals (Richards, 2008).

During the emergence of the first “Red Scare” between 1919 and 1920, a nationwide fear of communism, socialism, and anarchy grabbed the American psyche following a series of anarchist bombings. The masses were afraid unions were heavily influenced by Communism. The U.S. Government also responded to the anti-Communism hysteria under J. Edgar Hoover’s Bureau of Investigation (University of Missouri-Kansas City, 2011). As a result, thousands of innocent people were imprisoned or deported for expressing their views and civil liberties were largely ignored (University of Missouri-Kansas City, 2011). Labor opponents used the fear of Communism to their advantage to quell labor enthusiasts. They deemed those with Communist ties to be vigilantes and violent (Goode, 1996). The extent to which all of this was true however, is debated and presumed to be largely exaggerated.

The Red Scare had significant implications for labor and may have limited the potential success of unions. The overtly political efforts by the Communist Party (CP) created an internal struggle within labor and impacted their ability to grow the unions (Yates, 2009), despite the fact that Communist members largely kept their affiliation a secret (University of Washington, 2011). The CP organizers were able to influence all imaginable industries, including maritime, canning, farm laborers, machinists, and mills

through organizing labor, strikes, and political protests. To this day, the CP is credited with crossing racial, ethnic, and social lines (University of Washington, 2011). Despite CP's avid, dedicated activism for labor, the Communist influence divided the union with secrecy, domineering, and intolerant stances (Friedman, 2001).

### An Inhospitable Climate

Early attempts to achieve harmony between labor and business included the development of the National Civic Federation. Founded in 1900, the National Civic Federation brought hope and good intention that labor and business leaders could come together for the best interest of the worker. The organization favored moderate progressive reform to resolve disputes, but the divide between labor and business continued and the “struggle between the oppressed and the oppressors... the labor and the capitalist” battled on (Zieger & Gall, 2002, p. 25).

During the early years of labor unions, employers worried about losing the freedom to be innovative and largely believed union tactics were irrational and counter-productive in this new era of industry (Zieger & Gall, 2002). With the realization that employers were hostile to unions, labor leaders obtained rights to organize on behalf of workers without the threat of legal repercussion.

The United States government was also inhospitable to unions. Between 1880 and 1930, legislation against unions emerged with 4,300 court orders filed to prevent collective action, such as strikes and boycotts. Despite the unwelcoming environment toward unions, in 1914 the Clayton Act antitrust law was established to protect union activities and humans from being “labor commodities” (Frasier & Freeman, 1997, p.47).

While the effort to protect labor was notable, employers largely ignored the Clayton Act with frivolous injunctions against unions, forbidding picketing, engaging in public disputes, and disallowing the enrollment of new members.

### World War I

During World War I, President Woodrow Wilson's administration endorsed unionization and collective bargaining in exchange for union support. To further counter the anti-union efforts, President Wilson created the National War Labor Board (NWLB) in 1918. The NWLB arbitrated labor disputes between unions and employers. In the end, corporate anti-unionism, unions' lack of political prowess, and a fear of government sponsorship hindered labor's legitimacy and countered the potential impact of the NWLB (Zieger & Gall, 2002).

By the end of World War I in 1918, economic expansion rose and unemployment fell. This brought new urgency to labor's initiatives and activism (Urban, 1982). From 1914 to 1920, union membership doubled to 5 million, resulting in over 3,000 strikes and thousands of work stoppages. The 1920's brought about company ingenuity with attempts to ward off labor union infiltration by offering "American Plans."

American Plans were company campaigns to deter outside unions from penetrating the work place. Employers competed with unions for their allegiance and offered paternalistic welfare programs and systems of employee representation to supplant unions (Friedman, 2001). Businesses took great efforts to build trust and company loyalty through programs that offered pensions, stock-ownership, and recreation opportunities directly to employees who opted not to force the union issue

(Richards, 2008). Labor advocates perceived American Plans as transparent maneuvering to further stifle union growth. By 1935, industry had nearly as many employees covered under American Plans as union members (Friedman, 2001).

### A Season of Legislation

After experiencing higher unemployment and lower union membership during the Depression during the early 1930's, significant labor growth occurred and unions were revived. Labor unions became more conservative as they purged big labor of left-wing unionists during this era (Yates, 2009). As a result, public opinion of unions was on the rise and a higher degree of empathy went out to the working class in response to the perceived power inequities of the industrial era (Richards, 2008; Troy, 2004).

As the 1930's progressed, labor was emboldened by an influx of supportive legislation. The New Deal, from 1932 to 1938, legitimized the labor movement. Because of President Franklin Delano Roosevelt's advocacy and New Deal creations, organized labor was viewed as a benefit to society as a whole. Union leaders began to look more favorably on governmental action and a mutual alliance with the Democrats (Moe, 2011). Four key legislative acts emboldened labor during this decade: The Norris LaGuardia Act, the National Industrial Recovery Act, the National Labor Relations Act, and the Fair Labor Standards Act (Frasier & Freeman, 1997; Richards, 2008; Troy, 2004).

First, Congress enacted the Norris LaGuardia Act in 1932, which limited employers' ability to obtain injunctions in labor disputes. The Act also outlawed "yellow-dog" contracts, agreements between employers and employees in which the employee



agreed as a condition of employment not to be a member of the union (American Federation of Teachers, 2012b; Yates, 2009).

Second, Congress enacted the National Industrial Recovery Act (NIRA) in 1933. NIRA officially declared the right to bargain collectively with self-imposed representation (Zieger & Gall, 2002). With promises of state support, many common laborers joined the labor movement at this time. As a result of NIRA, the government created the National Recovery Administration (NRA). The NRA attempted to revive industry by raising wages and collective bargaining, decreasing work hours, and reigning in unbridled competition (U-S-History, 2011).

Third, the National Labor Relations Act (NLRA) was established in 1935. Also known as the Wagner Act of 1935, the legislation ensured the right to form unions and collectively bargain through a union of choice (U-S-History, 2011). The NLRA was “designed to overcome the collective action problems that had long hobbled the labor movement and thereby to promote unionism, collective bargaining—and the Democratic Party” (Moe, 2011, p. 35). As a result, private sector union membership continued to soar, jumping from 14% in 1935 to 35% in 1949 (Moe, 2011).

The NLRA established the National Labor Relations Board (NLRB), an independent agency of the United States government (Aronwitz, 1998; Troy, 2004; Zieger & Gall, 2002). The NLRB, charged with protecting rights of laborers, investigated and responded to unfair labor practices and resolved disputes (Shostak, 1991; Zieger & Gall, 2002). The establishment of the NLRB spurred union growth and furthered labor protections. The NLRB ultimately bolstered the AFL’s membership and spurred the

creation of the Congress of Industrial Organizations (CIO). The CIO originally formed within the AFL in 1932 and focused on the auto, steel, and electronics industries (Troy, 2004).

Today, the NLRB is very much still in effect, although under significant scrutiny by the Supreme Court of the United States. The Supreme Court ruled in June, 2014 that three NLRB members were unconstitutionally appointed to the NLRB positions in 2012 and were not confirmed by the United States Senate. This left the NLRB unknowingly without a quorum and the need to re-evaluate the hundreds of NLRB decisions made between 2012 and 2014 (Scott & Mehrens, 2014; Supreme Court of the United States, 2014b).

The last of the New Deal legislation included the passing of the Fair Labor Standards Act in 1938. This key legislation honed in on the minimum wage, the 40-hour work week, and overtime pay (U-S-History, 2011; Yates, 2009). From 1932 to 1939, the labor movement grew exponentially, from three to nine million members. With the advent of the New Deal social programs, massive growth in union membership allowed for the government to use unions to stabilize the economy by raising wages and consumer spending (Brinkley, 1995).

President Roosevelt proved himself an ally of the labor movement and his championing of labor was a positive turn for unions. President Roosevelt later re-established the NLRB in 1942, which led to additional improvements in wages through compulsory arbitration, collective bargaining, and mandatory membership to unions (Troy, 2004; Zieger & Gall, 2002). This era of legislation brought about labor successes,

with regard to wages, contracts, work rules, employee benefits, and seniority, as well as provisions to address arbitrary favoritism, pay schedules, irrational discipline, and victimization of workers (Zieger & Gall, 2002).

### World War II

Union prosperity continued to define the later 1940's. War consolidated big labor's alliance with the Democratic Party and further confirmed state support of labor (Yates, 2009). More importantly, World War II (WWII) helped unions by staving off unemployment. Union membership soared to new heights, representing 35% of the workforce and 15 million members. Female membership in unions also grew during this time, from 800,000 to 6 million by the war's end (Goode, 1996). At the conclusion of World War II in 1945, unions expanded and provided political muscle that drove wages up, even for non-union members. The 1940's brought one of the most significant wins for labor unions- employer paid health care. Additionally, contractually mandated grievance procedures to address working conditions became more influential across the nation (Richards, 2008).

### Taft-Hartley

While union membership and principle gains were high, bureaucratic regulation was as well. The mid-1940's brought about the Taft-Hartley Amendment, as the Republican Congress amended the Wagner Act of 1947. Taft-Hartley forbade sympathy strikes, excessive union fees, and boycotts, as well as enabled states to outlaw "closed-shop" agreements. Closed-shop agreements restricted unionized workplaces from requiring that employees become members of the union as a condition of employment.

Under closed-shop agreements, employers could only hire union members and retain those employees who remained part of the union (Teamsters Local 624, 2012). Taft-Hartley also required all union leaders to sign non-Communist affidavits and loyalty oaths as a condition for participating in the NLRB-sponsored elections. By this point, the Communist Party had transitioned from a focus on worker rights to more nationalist endeavors, with efforts to influence society and infiltrate the federal government (University of Missouri-Kansas City, 2011).

During the second “Red Scare” from the late 1940’s to the late 1950’s, fueled by Sen. Joe McCarthy, Congress increased investigations into alleged Communist influences in government, society, education, labor, and Hollywood. Often without cause, accusations of affiliation with Communists ties and anti-Communist rhetoric were common. This left many to debate about the actuality of the Communist concern versus the fear mongering that McCarthy may have promoted. McCarthy was a controversial figure who had little success substantiating his claims, which ultimately led to his censure from the U.S. Senate for behavior “contrary to senatorial traditions” (Biographical Director of the United States Congress, 2012, para. 1).

Taft-Hartley also allowed RTW provisions, later established in 1955. Opponents of RTW held this legislation in contempt, because there was nothing in place to force members to join the union or pay full or partial dues, even though union leaders believed non-members benefitted from collective bargaining (Yates, 2009).

To further serve as a blow to labor, Taft-Hartley allowed the President of the United States to ban strikes in the case of national interests. It also allowed permanent

hiring to replace striking workers (Aronwitz, 1998; Troy, 2004; Zieger & Gall, 2002). This powerful legislation shifted the NLRB from a pro-union stance to one which was more neutral, adversely impacted labor (Zieger & Gall, 2002).

The Condon-Wadlin Act, enacted from 1947-1967, prohibited strikes by all public employees, with a heavy focus on teachers. The Condon-Wadlin Act did not offer any other alternatives for solving labor disputes (Aronwitz, 1998). This led to labor leaders acting as “defacto” lawyers, as they worked to interpret contracts on behalf of union members (Aronwitz, 1998).

Under federal and state laws, unions did have the option to negotiate “members-only” contracts. Federal Law permits unions and employers to engage in non-exclusive collective bargaining for union members only (National Alliance for Worker and Employee Rights, 2005). However, in an effort to obtain sole monopoly bargaining power and exclusive representation of employees, labor leaders typically elected to cover all employees who were part of a bargaining unit (Horowitz, 2004; Ichniowski & Zax, 1990).

In the end, Taft-Hartley and Condon-Wadlin weakened labor growth and the union’s legalistic procedures of the union. As a result of labor’s damaged position, union leaders responded with the formation of political action committees (PACs). PACs led to increased support for liberal social and economic programs, as well as a solidified tie to the Democratic Party (Zieger & Gall, 2002).

### Together As One

After great success, wealth, and political power in the 1940's, unions in the private sector experienced halted growth in the 1950's (Moe, 2011). The general public lost interest in the "function of the union" (Shostak, 1991, p. 253) as a counter-union offensive by business and conservative politicians emerged (Richards, 2008).

However, the 1950's brought about a positive shift for public sector unions. As Moe (2011) indicated, "Governments and parties were no longer rooted in patronage, and Democratic politicians were eager to curry favor with the unions and promote their causes" (p. 35). To counter the anti-union culture, a historical merger unfolded, which led to an extended period of labor unity—the unification of the American Federation of Labor (AFL) and Congress of Industrial Organizations (CIO) in 1955.

The unification of the AFL and CIO in 1955 represented one of the largest and most important partnerships in labor history (American Federation of Labor and Congress of Industrial Organizations, 2011; Yates, 2009; Zieger & Gall, 2002). Prior to their merger, bitter competition and fighting ensued between the two labor giants. Concerns emerged about the CIO having Communist influences, while the AFL purportedly harbored gangsters. Despite the previous ill-will, the combined entity amassed great membership between 1955 and 1975. An additional 4 million public employees joined the union or benefited from collective bargaining (American Federation of Labor and Congress of Industrial Organizations, 2011). Most notably, wages and salaries tripled for public workers during this time (Aronwitz, 1998; Zieger & Gall, 2002). This was also the era when the AFL-affiliated American Federation of State,

County, and Municipal Employees (AFSCME) joined the blue-collar fight “to promote, defend, and enhance the civil service system” (American Federation of State, County, and Municipal Employees, 2011). Despite their growth and successes, organized labor had documented incidents of corruption that brought significant scrutiny from the government.

### Corruption

Documented incidents of racketeering, misappropriation of funds, and other labor misconduct occurred, resulting in locals expelled from unions, arrests, indictments, and convictions of various labor leaders (Horowitz, 2004). The 1959 McClellan Congressional hearings sought to investigate the growing concerns of corruption, criminal infiltration, and illegal activities in unions. The hearings culminated with the advent of the Labor-Management Reporting and Disclosure Act, also known as the Landrum-Griffin Act of 1959. Landrum-Griffin anti-racketeering legislation put in place many measures to monitor labor union’s internal affairs and relationships with the employers (Yates, 2009). Hearings in the 1970’s would reveal continued mafia activities, leading the Justice Department to aggressively pursue unions with evidence of mob ties and ultimately led to arrests and more prosecutions labor leaders tied to corruption (Powell, 2011).

### Civil Rights

The social conflicts and turbulence of the 1960’s brought every American institution under attack, including labor unions. Labor leaders desired to be seen as the advocates of the underprivileged. Much of labor’s agenda was devoted to passage of

legislation to help low income and minorities through public welfare and civil rights that became more apparent in the 1950's and 1960's (Zieger & Gall, 2002). Labor unions inspired other oppressed groups to act, which included African Americans during the Civil Rights era and women during feminist movement growth (Aronowitz, 1998). Through funding, advocacy, principle, and lobbying, the labor movement exponentially influenced the rights of African Americans, women, and other minorities.

Women were a key constituency for unions. By and large, labor unions allowed women to be members, but remained reluctant to endorse women's social programs and issues, including equal rights, job security, equal pay, and seniority. Eventually, greater protections enacted on behalf of women addressed work hours, rest periods, and tasks to which they were assigned. Because of these provisions, male laborers felt antagonized and thought women received special treatment (Jones, 1988).

Naysayers believed greed and self-interest, not altruism and equality, motivated union advocacy (Richards, 2008). Public opinion held mixed views. Unions were thought to be insensitive to the rights of minorities, women, and Vietnam Veterans, despite labor's advocacy for oppressed groups (Friedman, 2001; Zieger & Gall, 2002).

With a common interest in the Civil Rights movement, labor again grew closer to the Democratic Party and were perceived by many to lack an independent political and legislative agenda. Use of membership dues and fees from those non-members forced to pay dues were largely used to support Democratic candidates (Aronowitz, 1998; Troy, 2004; Zieger & Gall, 2002).



### Public Unionism

The 1960's were again times of prosperity for labor. The bulk of government (public) unionism took off in the 1960's. Public sector laborers had the same basic concerns as workers in the private sector. The main goal of the public sector union was to ensure job security, promote occupational interests, and mobilize independent power on their behalf (Moe, 2011). In 1962, President Kennedy issued Executive Order 10988 that allowed bargaining rights to federal employees and formally declared encouragement of unions. This inevitably led to states granting bargaining rights to public employees, thereby strengthening AFSCME (Zieger & Gall, 2002).

During the 1970's, public unions became more powerful in size and influence, which led to a dramatic change in the cost of public services, taxes, economics, and politics. Thus, with each wage and benefit increase, union opponents and tax payers shared concerns of emerging rising cost increases associated with education, health care, and basic public goods (Aronwitz, 1998). Union membership soared and political clout grew (Zieger & Gall, 2002). This union strength positively correlated with increases to fringe benefits, especially in the arena of pensions, health care, insurance, and vacations.

### The Decline

During the 1970's and 1980's, most unions sought protection under the wing of the Democratic Party, who accepted labor's money and campaign assistance. Labor leaders "increased their efforts politically in order to win collective bargaining laws, organize new members, and wield clout on behalf of existing members" (American Federation of State, County, and Municipal Employees, 2011, para. 6). Unfortunately for

the labor union, the Democratic Party moved away from many legislative and political goals that were supported by unions. A shakeup with the Democratic Congress occurred as it began deregulating business, which wreaked havoc on the unions (Aronwitz, 1998). During the Carter administration, a steep decline in labor's legislative and political impact occurred, largely because of the Taft-Hartley amendment restricted the gains and power of labor unions.

The business climate again proved to be inhospitable to unions. Employers blatantly violated the Wagner Act. During the 1970's, an estimated 10,000 workers had been illegally discharged from employment because of union affiliation. Additionally, union avoidance became an "industry," with the advent of anti-union consultants and attorneys to counsel employers.

In 1979, the Civil Service Reform Act focused on re-regulating labor relations and collective bargaining for federal employees (Troy, 2004). After the nation recovered from the recession of the early 1980's, public unions began to emerge as powerhouses. Unions found it easier to organize and prosper in the public sector (Moe, 2011). Growth took place with the boom of government jobs in healthcare, protective services, government offices, and education (Borling, Fullagar, & Kelloway, 1992). This government employment, considered the new unionism, shielded members from traditional marketplace factors (Troy, 2004). The public unions during the 1980's represented the largest part of the AFL-CIO.

President Reagan's infamous run-in with the Professional Air Traffic Controllers Organization (PATCO) in 1981 proved to be a turning point in labor history (Glass,

2008). After talks with the Federal Aviation Administration collapsed, PATCO workers took to a strike. Reagan threatened workers to report back to work within 48 hours or their jobs would be terminated. Calling Reagan's bluff, the workers did not return. In turn, Reagan fired all the striking workers, replaced them, and imposed a lifetime ban on rehiring the striking workers. Reagan also branded strikes illegal and federal judges levied fines of \$1 million per day to the unions. Reagan's actions humbled labor leaders and tamed labor-related activities.

By the early 1980's, 42% of local government workers, 28% of state government workers, and 19% of federal workers identified themselves as union members (Moe, 2011). The public sector unions had become the stable force of organized labor. However, in the 30-year span between 1953 and 1983, the unionization rate fell dramatically in manufacturing, transportation, construction, and mining (Friedman, 2001) and total private union density was down to 17 percent (Moe, 2011). A 1980's poll indicated that 58% of unionized employees believed they would not need unions to get fair treatment by their employer. Unions came to be seen as a "strategy of last resort, rather than a natural or preferred means of improving job conditions" (Richards, 2008 p. 5).

Whereas private unions depend on market fluctuation, the public unions were largely dependent upon political, social, and ideological climates. Complaints about public union growth was accompanied by concerns of overpaid workers, low

productivity, and poor service quality (Aronwitz, 1998). Concern continued over the large union settlements being funded on the backs of tax payers (Aronwitz, 1998; Troy, 2004).

By 1990, unions represented only 15% of the total workforce in the United States and a mere 10% of private sector jobs (Aronwitz, 1998; Friedman, 2001; Masters, 1997). This contrasts starkly to the peak membership in 1954 with 35% of all American workers belonging to unions (Gallup, 2014; Zieger & Gall, 2002). American Federation of State, County, and Municipal Employees (2011) attributed the decline to state legislatures that were “increasingly in the hands of the right wing” (p. 2). Public support again waned with the impression that unions were now a “mere bureaucracy of racket” (Richards, 2008, p.68). As a result, labor organizers worked to diversify their membership and sought white collar jobs such as nurses, doctors, and professors (Zieger & Gall, 2002).

By 2000, labor unions abandoned their traditional opposition to illegal immigrants and wanted broad amnesty for illegal immigrants. The AFL-CIO also adopted a constituency group, Pride At Work, a representative coalition of lesbian, gay, bisexual, and transgender people (American Federation of Labor and Congress of Industrial Organizations, 2011). These political moves helped minority groups become allies of organized labor. In turn, 350,000 new union memberships had been created by the end of 2000, with the ranks of labor proving to be more diverse than ever (Zieger & Gall, 2002).

In 2004, only 13% of the private labor force was unionized (Troy, 2004). Fortunately, for those laborers who were without jobs in the private sector, thousands had

been absorbed by municipalities, health care, and education, all leading to an increase in public sector jobs and union membership.

Union leaders attributed several outside forces to the membership decline. For example, AFSCME leaders believed, “Privatizers, deregulators, tax-cutters, people who want to turn back the clock on racial justice and women’s equality, and selfish people at the help of corporations all seek to undermine and malign” labor (AFSCME, 2011, para.11). However, some observers of business, labor, economic, and politics, saw other reasons for the decline in membership, clout, and impact, such as: (1) employer opposition; (2) a shift in worker attitudes; (3) the struggle to professionalize; (4) traditional union structure; (5) stifling legislation; (6) abuses by labor leaders; and (7) union political affiliation (Aronwitz, 1998; Barone, 2011; Beckel, 2011; Borling et al., 1992; Masters, 1997; Richards, 2008; Shostak, 1991; Yates, 2009; Zieger & Gall, 2002).

First, labor leaders chiefly attribute employer opposition as the major cause of the decline in labor (Aronwitz, 1998; Masters, 1997; Richards, 2008). Indeed, employer opposition stemmed from the frustration labor brought to business and productivity (Richards, 2008). When unions impose additional and seemingly unreasonable wage and benefit demands, along with work rules that make production, governance, and adjustments difficult, businesses were inclined to seek non-union competition with which to do business (Moe, 2011). The North American Free Trade Agreement (NAFTA) established by President Clinton further positioned employers to move plants to Mexico or close down all together (Yates, 2009).

Second, a shift in worker attitudes emerged with regard to the steadfast American values of individualism, independence, and initiative (Aronwitz, 1998). Many prospective members did not join the union because they believed their involvement stifled individual initiative (Harris Poll, 1984, as cited in Troy, 2004). There was a sense that by joining the union, they may become part of a “faceless proletariat” (Richards, 2008). The labor unions started out as small voluntary associations, but have since blossomed into larger formal bureaucracies with fewer individual rights and freedoms (Borling et al., 1992). The pressure to join and remain aligned to the union was, and continues to be high-stakes for workers. In a 1980’s union poll, union workers said they would vote against the union if the votes were secret ballot, but often unions required “card check” or other open and high-pressure forms of voting (Richards, 2008).

Third, unions themselves may have also had a hand in their decline. A growing identity crisis took hold internally as labor attempted a shift away from the working class ideology that had previously spurred them toward peak membership (Yates, 2009). In an effort to counter arguments that unions had become complacent, labor desired to overcome their image as representing a narrow population of the working class. They made attempts at diversifying and re-professionalizing. Initially, unions were of little service to white collar and service oriented workers (Richards, 2008). To accomplish an increase in membership and power, reorganization of labor unions expanded to include a focus on professional and technical employees.

While the labor movement worked to recruit middle class and white collar workers, that demographic largely believed joining a union threatened their middle class

status and values (Richards, 2008). The notions of collectiveness, solidarity and allegiance to one's social class represented by unions conflicted with the professional notions of individual upward mobility, initiative, and independence (Shostak, 1991). It proved to be difficult to organize white-collar professionals because of the stereotypes of labor, rigid job classifications, loss of prestige, and straightjacket work rules (Richards, 2008). As a result, unions began to organize through alliance with community groups whose ideology and values differed from those of traditional union members. Unions began to embrace knowledge producers as a strategy for membership, including a focus on teachers, nurses, and physicians (Richards, 2008).

Fourth, with 1930's union structures still in place, it appeared to those on the outside that little transformation within the labor movement had occurred. Many labor opponents questioned whether unions were capable of change at all. The success of organizing workers with militant tactics had diminished (Masters, 1997). Unionism held that collective action was the fundamental tool of the 'worker'" (Aronwitz, 1998). Al Shanker, former AFT president astutely said, "If we rely on traditional techniques, then we are guaranteeing the labor movement's continued decline" (Shostak, 1991, p. 64).

Between 1978 and 1992, the number of strikes plummeted with the realization that "old-time militancy would not be tolerated" (Zieger & Gall, 2002, p. 259). "Surface bargaining," the stalling tactic of going through the motions of negotiations without an intent to settle, became intolerable (Yates, 2009). In fact, many of the traditional union tactics were seen as "representing a failure of intelligence" (Richards, 2008, p.73).

Additionally, unions were thought to both protect the core of long-time employees and to maintain the status quo with their system of seniority, regardless of performance, capability, and effectiveness of newer members. This ultimately led to the sacrificing of lower senior members for the continued security of longer-term unionists. This traditional union tactics oppressed the young members that the unions were purportedly recruiting and representing (Aronwitz, 1998; Masters, 1997; Richards, 2008).

Fifth, stifling legislation proved to be yet another contributor to labor's decline (Yates, 2009). Taft-Hartley and Right-to-Work legislation both limited union activities and autonomy. Labor sympathizers believed Congress was partly to blame, with even Democrats even seen as hostile to unions. The legal environment was hardly hospitable (Masters, 1997). By 1980, labor leaders believed NLRB had failed to enforce laws that protected the right to unionize (Richards, 2008; Shostak, 1991).

Sixth, the growing abuses at the top of labor's hierarchy may also have contributed to labor's decline. Those astutely paying attention to the union movement believed that union leaders ultimately raked in more than their fair share. The "fat cats" as they were called, operated in self-protection mode and received higher salaries, financial incentives, and pension packages not available to regular members. Richards (2008) indicated that union bosses had arrogantly overindulged and treated themselves generously, as their high salaries led to an unfavorable status. Across all labor unions, the top 100 labor union officers and employees received \$54.8 million in compensation, paid for by union membership dues (Hart, 2014).



Lastly, stiff political affiliations attributed to the decline in labor's membership. Politically, organized labor towed the party line for Democrats and decided to "stay in line with the Democratic Party come hell or high water" (Yates, 2009, p. 196). While unions largely aligned with the Democratic Party, their own members may not have been so taken by the Democrats on an independent level. As PACs supporting Democrats grew, so did concerns about use of funds for political reasons. Representative decisions most often supported Democratic candidates, often without the consent or consensus of members (Richards, 2008). To illustrate the possible disconnect between leadership and membership cited above, during the 2000 election cycle, labor unions accounted for about 40% of all money Democrats collected from PACs (Beckel, 2011). Union leaders endorsed the Democratic presidential candidate in 2004, despite 37% of its membership personally supporting a Republican candidate (Troy, 2004). In 2008, public employee unions were estimated to have donated \$400 million to the Democratic Party, while AFSCME alone donated \$90 million (Barone, 2011).

The history of labor suggests a cyclical pattern, one of cause and effect, where unions were influencing or being influenced by the contextual factors of each era. Although unions have been in decline for decades, they remain an integral part of social and economic fabric in the United States.

### Labor Today

The topic of labor unions is common fodder in present day discussion among politicians, the media, and advocacy groups. Current day news is replete with reports on union political action, bargaining rights stripped at the state level, and continued

corruption. Public opinion suggested that labor's image had suffered dramatically in recent years. At its height in 1957, 75% of Americans approved of labor unions, while in 2009, only 48% of Americans approved of labor unions. Most recently in 2014, a slim majority, 53% of Americans approved of labor unions (Gallup, 2014). Additionally, Gallup (2014) identified a growing level of support for Right-to-Work laws across the country that prohibits forced union membership. Across America, 71% indicated support for Right-to-Work laws and when broken down politically, 65% of Democrats, 77% of Independents, and 74% of Republican's agreed.

Many polls throughout the last decade indicate the rationale for the waning support of labor unions. Consider the following poll findings gathered by Union Facts (2013). In a 2004 Zogby poll, labor union corruption was second only to use of dues toward politics as a factor disapproving of labor unions. In a 2011 Fox News poll, 68% of registered voters believed they were concerned about public employee unions having too much influence over politicians, who when elected, must negotiate with these labor unions. The Word Doctors reported in 2010 that 66% of public and private union employees believe it is unjust for labor unions to spend membership dues on politics without their approval. Along the same lines, 69% of private and public union members believe union officials need to stop spending union dues on partisan politics and invest in creating more jobs and membership. CNN reported that in the 2004 presidential race, 38% of labor union members voted for Republican candidate, George W. Bush, while 95% of union funds went to support Democratic presidential candidate John Kerry.

Today the AFL-CIO comprises the largest union conglomerate, representing 55 smaller labor unions and 12.2 million members. Their commitments have evolved only slightly, with AFL-CIO continuing its efforts to organize and expand legislative impact, as well as respond to the changing economy and needs of workers in their communities (American Federation of Labor and Congress of Industrial Organizations, 2011).

The United States Bureau of Labor Statistics (2014) recently revealed that public union membership has outgrown private union membership, a first in U.S. labor history. Unionization rates for 2013 indicated 11.3% of the working population identify with a labor union, which reflects 14.5 million union members. An additional 1.5 million workers report no union affiliation, but their jobs are covered by a union contract. Interestingly, the public-sector workers had a union membership rate (35.3%) more than five times higher than that of private sector workers (6.7%). The highest rates of unionization are in education, training, library, and protective service occupations. Over half of unionized workers in the nation live in just seven states: California, New York, Illinois, Pennsylvania, Michigan, New Jersey, and Ohio. Males had a higher union membership rate at 11.9%, compared to females at 10.5%. Median earnings reflected that union members had weekly earnings of \$200 more a week than non-members.

Although legislation was enacted to combat corruption in labor, recent history is also replete with complaints of money laundering, embezzlement, illicit check writing, luxury purchases on the backs of union members, retroactive surcharges, wire fraud, and conspiracy (National Right-to-Work Legal Defense Foundation, 2009; United States Senate Committee on Health, Education, Labor, and Pensions, 2003).

For example, in June 2014, the United States Supreme Court weighed in on the forced dues of home health workers by the Service Employees International Union. In this case, the home-health workers were family members caring for loved ones and were not public employees. Mandatory dues were syphoned from the Medicare or Medicaid payments in an unauthorized manner. It is estimated that SEIU reaped nearly \$35 million from the elderly or disabled between 2006 and 2013 (Chiaramonte, 2014; Service Employees International Union, 2014; Supreme Court of the United States, 2014a). Despite these noted concerns, organized labor has made gains in many areas that impact all American workers.

#### Successes of Organized Labor

Unions strove to impact the relationship between labor and management. Labor, a force for transforming our society, gave strength to individuals, solidarity to the masses, and a voice to be heard throughout the nation (Richards, 2008). It could be well-argued that unions have improved working conditions for *all* Americans over the years. Indeed, organized labor's efforts led to wages and benefit improvement for all workers (Yates, 2009). Primary outcomes of collective bargaining include improvements in compensation, job security, benefits, and work conditions. Secondary outcomes include increased productivity and performance, as well lower turnover and absenteeism (Richards, 2008).

There are several notable accomplishments for which the labor movement may not always be given credit. For example, employers offsetting insurance costs and the emergence of co-pays can be attributed to labor advocacy (Aronwitz, 1998). With the

persistence of unions, child labor laws ended. In stark contrast to the 72-hour work week, through union advocacy the 40-hour work week was enacted. The establishment of the Occupational Safety and Health Administration (OSHA) in 1970 also proved to be an instrumental win for workers. To this day, OSHA regulates workplace safety and health conditions for workers and consumers (United States Department of Labor, 2011c). At the urging of the labor movement, President Clinton also established the Family Medical Leave Act (FMLA) in 1993. FMLA required employers to provide unpaid leave for personal medical or family medical emergencies (United States Department of Labor, 2012).

While labor unions amassed great success over the years, the teachers' unions did as well. Like traditional labor entities, teachers' unions experienced great growth, as well as the inertia of sluggish membership and a lack of public support. Despite the ups-and-downs, the teachers' unions also have a strong history that largely influenced both the field of education and our current-day broader political landscape.

### Teachers' Unions

Public perception holds varying views of teachers' unions today. Allies to the unions believe they care deeply about children, promote quality education, and fight for social justices. Union opponents believe they are oligarchic organizations that force unwilling teachers to join and are concerned only for their own special interests (Moe, 2011). Neither characterization is entirely accurate, but what is unarguable is the impact of teachers' unions on all levels of education. Teachers' unions today possess more power and money than any other union or special interest group and as such, have used it

to mold public education into their preferred shape. However, it is first important to note their meager beginnings and slow historical progress made through the years.

### Early History

Although labor unions were a product of industrialization and urbanization, they expanded to include professions such as education. Two major unions evolved in the mid 1800's to represent teachers— the National Education Association (NEA) and the American Federation of Teachers (AFT). Throughout the years, the NEA and AFT often rivaled each other with regard to membership, philosophy, and tactics. But together, they combated a variety of impossible working conditions for public school educators. The history of the teachers' union provides a unique perspective on teachers who worked through the Civil War and Depression, as well as World Wars I and II.

Early on, disgruntled educators set out to make a difference in education. However, labor laws and political power were stacked against them (Moe, 2011). Although some state affiliations had formed, no national camaraderie existed for teachers. Poor conditions in public schools spurred the unions to action on a national level to address exploitation and mistreatment of both teachers and children. Having been subjected to infringement of personal and professional freedoms, the earliest teacher unions strove to create a national identity.

Conditions were so bleak in one-room schools that they lacked the basics needed to teach multi-age groups effectively. Teachers were often assigned up to 60 students in a classroom, scant teaching materials, and little to no additional support. In many cases, salaries were merely in the form of food and lodging. Despite growth in public schooling,

the public lacked support for education, benefits were non-existent, discrimination against women continued, and job security was at a minimum (American Federation of Teachers, 2012a; National Education Association, 2011a; Public Broadcasting Services, 2001).

In 1867, the teacher unions won its first legislative victory with the establishment of the Department of Education. Although short lived, this department intended to collect information to be shared among the states to establish effective schools (United States Department of Education, 2012b). Within two years, the Department of Education was deemed an office and then subsequently a bureau, with no cabinet level status and less power.

By the 1900's the teachers' union focus expanded to employee compensation and addressing teacher shortages. But the NEA and AFT had already begun to differ with regard to membership, resources, governance structure, and leadership personnel (Lieberman, Haar, & Troy, 1994). These differences warrant a closer look at each organization and their history.

#### National Education Association

The NEA began in 1857 as the National Teacher Association with a mission of “crusading for the rights of educators and children” (National Education Association, 2011a). The early NEA did not have “an interest in power politics, but in professional concern with improving education at the local level” (Paige, 2006, p. 27). The NEA concerned itself with educational issues and profession development (Richards & Harsh, 2004). At this time, the NEA provided an opportunity to discuss the application of

pedagogical ideas, theories, and principles to the local level (Discover the Networks, 2008; Waters, 2010; West, 1981), as well as to create professional standards and curricular excellence (Paige, 2006).

Although initially started by superintendents and restricted to males, the professional organization eventually consisted of all levels of educators and chiefly represented suburban and rural areas (National Education Association, 2011a; Urban, 1982). “The NEA held that anyone who dealt with education should share common purposes and interests, regardless of position” (Ota, 1985, p.2). For years, the NEA was depicted as a professional organization with a noble calling, determined to upgrade teaching to a profession (Urban, 1982). Specifically, the NEA had a two-fold mission: (1) To elevate the character and advance the interests of the profession; and (2) To promote the cause of Education in the United States (Ota, 1985). Some school boards required teachers to join the NEA because membership was considered a sign of professional leadership (Ota, 1985; Waters, 2010).

The NEA members in the late 19<sup>th</sup> and early 20<sup>th</sup> centuries felt a professional sense of responsibility to children and the public that often caused them to put student instruction ahead of their own well-being (Paige, 2006). Discussion of salaries and working conditions were perceived as unprofessional (Ota, 1985). For many years, the NEA had nothing in common with a traditional union (Paige, 2006) and members eschewed union tactics and collective bargaining (Richards, 2008; Troy, 2004; Waters, 2010).



However, in the early 1900's with 2,000 members, the NEA broadened its focus and established a national committee focused on increasing salaries, tenure, pension, academic freedoms, rights for female teachers, and to strengthen public school (Moe, 2011; National Education Association, 2011a; Urban, 1982). They became effective at lobbying and were a distinctive and progressive voice for education reform (Aronwitz, 1998). By 1920, the NEA had 53,000 members and grew too large to run on an ad hoc basis. The NEA moved their headquarters to Washington, DC (Moe, 2011) and developed the Representative Assembly, thereby creating state and local affiliations (Lieberman, et al., 1994; National Education Association, 2011a). As a result, the NEA enjoyed massive growth, but also developed a bureaucratic structure that led to the “retooling of the teaching profession and notions of professionalism” (D’Amico, 2010, p.12).

#### American Federation of Teachers

In contrast to the NEA, the American Federation of Teachers (AFT) formed in 1916 as a union with developed ties to organized labor (Waters, 2010). Made up largely of political activists, the AFT had strong links to the AFL, largely as a symbolism of labor strength (Moe, 2011; Richards, 2008; Urban 1982). The AFT grew quickly with 174 locals in the first four years (American Federation of Teachers, 2012a; Aronwitz, 1998). With the early vision of controlling the public schools, the AFT largely represented urban area teachers. The Commission on Educational Reconstruction stated that the AFT had a two-fold mission upon their inception: (1) Obtain teacher rights to

which they were entitled; and (2) Raise standards of teaching profession by securing conditions essential to best professional service (Ota, 1985).

By 1920, AFT growth stopped as school boards pressured and intimidated teachers to resign from the union (American Federation of Teachers, 2012a). Between 1920 and 1930, AFT union membership declined by half. The NEA took the stance that AFT was lowering the teaching profession to that of a common laborer (Waters, 2010). The AFT worked to identify themselves as a professional entity working on behalf of teachers (Aronwitz, 1998, p.77). As a result of this philosophical shift, from 1932 to 1939, AFT membership grew from 7,000 to 32,000 (American Federation of Teachers, 2012a).

#### The Birth of the Progressive Agenda

At the end of World War I, school enrollment exploded. As a result, the NEA and AFT expanded exponentially. At this time, both organizations moved their political energies outside of education with a progressive ideological social agenda. Influenced heavily by John Dewey, this push toward progressivism continued through the Great Depression, with the ideal that education could fix society as a whole. The NEA and AFT focused heavily on making the major function of the school to be social orientation of the individual and the establishment of a new social order (Paige, 2006). This progressive agenda is evident in teachers' union's political platform and legislative activities yet today.

#### War Inspires Growth

Like traditional labor unions, the NEA and AFT played a significant role in World War II. Through efforts like coordinating rationing, promoting Defense Bonds and Savings Stamps, or planting victory gardens, these two unions were as patriotic as the next (American Federation of Teachers, 2012a; National Education Association, 2011a). In the years following World War II, AFT renewed their fight to improve the conditions of America's public schools and their teachers (American Federation of Teachers, 2012a).

### Teachers Unions and Civil Rights

Through the late 1950's and 1960's, a concerted effort to attend to civil rights was in full force. Both the NEA and AFT considered themselves to be at the forefront of the Civil Rights movement, as advocates for individual rights (American Federation of Teachers 2012a; National Education Association, 2011a). Most notably, teachers' unions focused on rights infringements for African Americans, Native Americans, American soldiers, women, and children. Fighting gross inequalities of African American students and teachers, the NEA went so far as to affiliate with 18 African American teacher associations.

However, the NEA remained segregated. Eventually, after a 20-year inter-organization conflict, the NEA fully desegregated and banded with the African American teacher associations in 1966 (Cameron, 2005; Discover the Networks, 2008). This paved the way for other minorities in education (National Education Association, 2011a). The AFT expelled charters that refused to desegregate and ultimately lost thousands of members. Despite the loss of members, the AFT created "Freedom Schools" staffed by

AFT volunteers to offer black students a public education (American Federation of Teachers, 2012a).

### Association or Union?

With a philosophical shift underway among the teachers' unions, they were "painted into a more militant corner" (Cameron, 2005, p. 75). Both the NEA and AFT sought higher esteem for the profession of education and argued they were a professional organization. However, the NEA and AFT purported anti-unionism sentiments, yet both utilized labor tactics. Both organizations knew that teachers wanted to be seen as professionals, but the balance between professionalism and labor-related tactics proved difficult. During this time, many teachers were appalled to be affiliated with union-minded entities, but none-the-less were still dues-paying members (Richards, 2008).

A major shift in organizational philosophy and action ensued for both the NEA and AFT, leaving a divide between leaders and members. NEA and AFT leaders moved toward union ideology, while teachers tried to hold on to the notion of a professional association. Despite the reluctance on the part of teachers, the NEA leadership announced the NEA had been "put on notice that, if it didn't convert itself into a union and compete for teachers, the AFT was going to win over the entire constituency" (Moe, 2011, p. 47). The NEA had "little choice but to embrace collective bargaining in response to dual pressures of changing legal environment and competition from the AFL-CIO affiliated AFT" (Hurd, 2000, p. 22).

In 1961, the first teacher's strike took place in New York City (Moe, 2011; Ota, 1985) and 20,000 teachers walked off the job (Moe, 2011). This paved the way for an aggressive organizational campaign and 300-plus strikes in the following decade. In 1966 alone, 33 teacher walkouts occurred (American Federation of Teachers, 2012a; Moe, 2011).

Along with strikes, unions utilized collective bargaining to address employment rights, benefits, wages, and work conditions (Paige, 2006). At this point in time, there was only one state with labor laws authorizing collective bargaining (Moe, 2011). The tide changed with President Kennedy's 1962 Executive Order 10988, which expanded collective bargaining rights to the public workforce, and included teachers (Moe, 2011; Paige, 2006). As Paige (2006) indicated, no state expressly forbid collective bargaining at this time, however "public opinion and political sentiment" initially blocked its widespread application (p. 31).

In its attempts to compete with the AFT, the NEA represents the most notable case of a public sector professional association transitioning into a union (Hurd, 2000). Although the NEA did not formally declare itself as a union until 1969, it began acting as a union during the early 1960's as soon as the threat to their existence became apparent (Moe, 2011). An identity crisis continued to haunt both NEA and AFT, leaving the public to think of school boards and administration as "corporations" and the teachers as "line workers" (Cameron, 2005). The move toward union ideology also came with massive growth in union membership.

However, not everyone within the teachers' unions was on board with the union mentality. As late as 1966, Dr. William Carr, NEA Executive Secretary, stated that NEA members should continue to:

Abide by the ethics of profession and not be goaded by indifferent or hostile public officials to act in ways that create an unfavorable image in the public mind... and that the use of strikes by the teaching profession for the economic advantage of the teachers will impair, and ultimately destroy the confidence of the public in the teacher. (Cameron, 2005, p. 39)

Carr's sentiments did not last long. Just one year later in 1967, NEA Executive Secretary Sam Lambert said, "[The] NEA will become a political power second to no other special interest group... NEA will organize this profession from top to bottom into logical operational units that can move swiftly and effectively with power unmatched by any other organized group in the nation" (Richards & Harsh, 2004, p. 7).

By the 1970's, funding for public schools became a common theme for the teachers' unions, as well as provisional support to paraprofessionals. The AFT began "organizing the organized" (Richards, 2008). Led by David Seldon, the AFT pioneered the application of industrial union tactics to educational institutions (Aronwitz, 1998). According to Seldon, AFT president during the 1968-1974 era, "AFT is a union first and an educational association second" (Richards, 2008, p. 153). While the AFT continued its partnership with the AFL, growing concerns emerged about their ties to a blue-collar union and fear of domination by union bosses (Richards, 2008).

The 1970's were a time of distinct transition for the teachers' unions. The teachers "discarded the professionalism at all costs" cloak (Cameron, 2005). One example was the

NEA imposition of unified dues on educators, requiring those interested in joining at the local level to also become state and national members with no exception (Association of American Educators, 2013). This approach to membership recruitment increased membership by 18% within one year, allowing for an expansive reach of power and an increase in revenue (Moo, 1999).

Additionally, the NEA began to embrace union ways, leading more strikes than the AFT during this time. Although it was not until 1980 that the NEA registered as a labor organization, it could be argued by opponents that the NEA overcame their hesitant attitude to become an “unabashed and militant trade union” (Richards, 2008, p.162).

Upon the NEA’s adoption of labor union tactics, Cibulka (2000) suggested,

The teachers’ unions, became an institutional player in public education with the advent of mandated collective bargaining... They acquired considerable influence not only over wages, benefits, and conditions of employment, but over the educational program of districts as well. Their financial and organizational resources permitted them to influence the election of sympathetic school board members and members of state legislatures. In some states they gained political influence over the election of the governor or appointment/election of the state superintendent or commissioner of education. At the national level, they became active and influential supporters of Democratic presidential candidates and became an influential voice on education bills being considered by Congress. (p.151)

Contested or not, the labor tactics did not stifle expansion for either unions.

“Rather than redefining the meaning of profession, through the teachers’ union, leaders appealed to traditional constructions as a way to bolster their authority and stature” (D’Amico, 2010, p.9). By 1975, the AFT and NEA combined had 3 million members, which was the largest sect in the labor movement. These 3 million people represented 80% union density among eligible members. Many labor experts partially attributed this

growth to an increase in males within the profession (Richards, 2008), as well as an increased unionization for university faculty (Shostak, 1991).

By the 1980's, the upheaval of the 1960's and 1970's had largely passed (Moe, 2011). The AFT and NEA were the only two labor unions gaining membership, with thirty states possessing collective bargaining laws for teachers (Moe, 2011). The two conglomerates refocused their political efforts toward lobbying and truly became economic and political powers. With this great expansion, doubt emerged that individual workers were truly represented by the expansive unions. The AFT and NEA had become so large and diverse that many outsiders and education insiders believed they could not possibly represent their members adequately and individual members no longer had a say in shaping policies (Richards, 2008).

#### Together at Last

The NEA and AFT rivaled each other through the 1960's, 1970's, and 1980's. During the 1980's, both organizations engaged in a back-and-forth of smear campaigns with "hand-to-hand" campaign combat" (Cameron, 2005, p. 101). The rivalry between the two education giants propagated many feelings of ill-will and negative attitudes toward education in general, and ultimately tarnished the claim of teachers as professionals (Richards, 2008). Both organizations accused the other of acting unprofessionally. Both NEA and AFT leaders drew on anti-union sentiment when it behooved them. For example, the AFT might accuse the NEA of being undemocratic, needing help with negotiations, or being racist (Richards, 2008).



The NEA joined in as well, but worked to minimize union sentiments with creative language. The NEA referred to their collective bargaining as “professional negotiations” and strikes as “professional leave days” (Ota, 1985; Richards, 2008, p. 152; Urban, 1982, p. 45) or “professional sanctions” (Waters, 2010, p. 8). No sudden swing in policy occurred, but rather a “slow shift in emphasis from the more hierarchical educational elite organization to a far more democratic structure that drew more teachers into organizational deliberation” (Murphy, 1990, p. 228). As Cameron contended,

Teachers were continually admonished to be professional, but they had none of the characteristics of other professions: they lacked any ability to make independent professional judgments, they had virtually no influence over their own salaries, and they exercised practically no control over the policies of their profession. Even worse, their opinions, individually and collectively, were neither sought nor valued; they simply weren’t part of the education power structure. For America’s teachers, professionalism was largely a shallow euphemism for indentured servitude. (2005, p. 16)

A historic attempt at a merger between the NEA and AFT took place in 1988, but painfully failed (Cameron, 2005; Richards, 2008). Labor leaders from both parties wanted to unite, but too many conflicts in mission and philosophy existed to allow the merger. However, instead of closing the door completely, the education giants formed the NEA-AFT Partnership. With the unified goal of improving public education, they are now directed by a joint council with shared funding and staffing. This new partnership attempted to bring the education giants together in an impactful way.

The beauty of the NEA-AFT Partnership is that it allowed each organization to have differing opinions and work separately, but brought them together on their common interests related to education and children. Today, they are allies and their jointly stated goals are to nurture and improve public education, fight for family needs and quality of

life issues, such as healthcare, neighborhood safety, and a caring government. Partnership initiatives include a focus on teacher quality, professional development, technology, school safety, and legal and legislative action (National Education Association, 2011g).

### Current Struggles

Teachers today are revered as one of the most highly organized and powerful occupation in the United States (Moe, 2011; Troy, 2004). Much of what teachers have in the way of working conditions, compensation, and job security today, may not have been possible without the vision, commitment, and toil of early unions. Teachers' unions have much success upon which to hang their hats. However, before exploring those successes, it is necessary to examine the challenges and issues of current day teachers' unions.

These challenges include declining membership, the notion of NEA as a reform blocker, the protection of self-interests, and corruption.

### Declining Membership

Recent concern lies in the NEA's self-report of declining membership numbers. The 2010 and 2011 NEA Director Reports both indicated significant membership loss and that the losses were even greater than expected. NEA Leaders anticipated that the membership loss will only increase in coming years (National Education Association, 2010, National Education Association, 2011d). Reaffirming this in a 2012 report, NEA has lost over 100,000 members since 2010. Furthermore, NEA leadership reports they are anticipating a total loss of 308,000 full-time equivalents between 2010 and 2014, which equates to a 16% drop in membership and roughly \$65 million in revenue (Sawchuk, 2012; Toppo, 2012).

The *2013-2014 Modified Strategic Plan and Budget* (National Education Association, 2013b) opens with the recognition of “another year of membership losses driven by economic stresses and political attacks” (p. 3). NEA asserts they are “laser focused on figuring out how to grow membership and plans to do this through research-based campaigns engineered to determine what works. Special attention is placed on young members, developing and supporting the implementation of alternative dues collection options, and developing models for new and nontraditional membership types” (National Education Association, 2013b, p. 26).

Depending on who is asked, there are many theories about why NEA membership is declining. Union leaders in general believe external factors such as job loss, soft labor markets, or anti-union presidential administrations influence union numbers (Labor Research Association, 2003). NEA Secretary-treasurer Becky Pringle most recently indicated that a relentless recession, political attacks, “stupid education reform,” and an explosion of technology are adversely impacting the membership numbers (Sawchuk, 2012, para 4). Within the NEA 2013-2014 Strategic Plan, NEA attributes the losses to “attacks on collective bargaining and the role of union, the nation’s changing demographics, education reform efforts, and an explosion in the use of technology and online learning” (National Education Association, 2013b, p. 3). The NEA goes on to say in this strategic plan that:

NEA’s external environment continues to be a challenge. With anti-union sentiments remaining strong, numerous state legislatures are considering bills that would directly impact payroll deduction, agency fee and/or collective bargaining and most, if passed, would directly affect our economic stability by diminishing our ability to enroll members and collect dues. Public education also remains

under assault, particularly from legislative efforts to implement vouchers and other schemes that transfer public funds to private hands. (p.5)

Union outsiders believe the member losses may be attributed to other reasons.

Decrease in union membership may relate to the influx of young teachers to the profession. Younger teachers may believe unions are of much less significance to them (J. Hawkins, personal communications, 2012) and have “less attachment and deference to the teachers’ unions” (Farkas, Johnson, & Duffett, 2003, p. 19). Today, public schools are more reliant upon young teachers, many of whom quit just after a couple years. They are less likely to join the teachers’ union compared to teachers in previous years (Toppo, 2012). Regardless of why, Rick Hess of the American Enterprise Institute suggested that losing that many members is “the kind of shift in the landscape that can force union leaders to shift their stance on issues” (Toppo, 2012, para. 8).

Tied to this is the idea that many educators see an incongruence between that of a profession and that of a union (Aldridge-Sanford, 2006). Younger and more veteran teachers alike are less inclined to join because of the connotation of a labor union tied to their profession, believing that education has lost collective respect.

Yet another reason for the decline in teachers’ union membership is likely related to membership dues. Several factors related to membership dues are in play. First, the overall amount of dues has many educators, who live on modest budgets, questioning if the high price of membership is worth it. Because of the unified dues, educators are required to pay dues to a local, state, and the NEA, which can range from \$700 to over \$1,000 per year. Tied to the idea of unified dues is that many educators would be supportive of paying dues to a local union, but may not have the desire to join the state

affiliate or NEA. For those educators, it is an all or nothing opportunity, if they are in a Right-to-Work state that does not require mandatory union membership or fair share fees. Thirdly, concern lies in how dues are allocated, meaning how the dues are spent on education and non-education issues, as well as the amount dedicated to seemingly partisan political activity.

Lastly, another concern that may impact current membership again ties to the political activities of the NEA. A chief “complaint of those who could not identify with the NEA is that [NEA] is too liberal. Many of the [members] do not identify with the political left and/or knew other teachers who did not lean to the left [politically]” (Aldridge-Sanford, 2006, p.70).

### Reform Blockers

In attempts to secure teacher rights throughout their turbulent history, the AFT and NEA have also developed divisive reputations. Advocates of the teachers’ union believe they are advancing the profession of education. However, teachers’ unions opponents believe teachers’ unions are obsolete in terms of improving public education—their stated goal— and in actuality are the most reluctant force in American education (Moe, 2011). “The unions have exercised dominance on top of the U.S. educational system by creating and maintain an extremely favorable status quo for teachers” (Waters, 2010, p. 3). Prior to No Child Left Behind, the teachers unions are thought to have blocked or watered down most significant education reform (Waters, 2010). Moe (2003) supported Waters’ contention by saying that,

The teachers unions, now the unchallenged leaders of the education establishment, have amassed formidable power rooted in collective bargaining

and electoral politics. They have fundamental interests that drive them to oppose almost all consequential changes in the educational status quo. And they operate in a political system that, by advantaging groups that seek to block change, make it relatively easy to ensure that genuine reform doesn't happen. (p. 183)

It is important to note that despite their political aptitudes, the teachers' unions do not always get their way in state and national politics when it comes to union-favored laws passing. As a result, teachers' unions often utilize the strategy of blocking new laws or weakening laws they do not want (Moe, 2011). Moe continues, "When all is said and done, the power of the unions to block change is the single most important thing that anyone needs to know about the politics of American education" (p. 277).

### Self-Interests

While the purpose of the education system is arguably to educate children, Moe (2011) asserted that unions are not in the business of educating children. Collectively, teachers have common interests, including job security, salaries, benefits, retirement packages, and time off. These are important job-related interests, but are not necessarily in the best interests of children (Lieberman, 2000; Moe, 2006). What many union opponents have concluded is that teachers' unions are special interest groups and have sacrificed what is good for children time and time again. As Farkas et al. (2003) suggested,

While some may argue that the old-style trade unionism needs to be replaced by a focus on professionalism, it is bread-and-butter issues- securing money and benefits- that have a lot to do with why unions enjoy teacher loyalty. Teachers simply believe their unions protect their interests. (p. 17)

To that end, opponents believe union's tenure laws protect incompetent or ineffective teachers, further diminishing the perception of the teachers' union (Strom &

Baxter, 2001). Moe (2011) reiterated the concern about protecting incompetent teachers, when he shares the startling discovery about the New York City school system in recent years and their attempts to protect poor teachers at the expense of students, parents, communities, and taxpayers.

In 2009, a story broke about 700 plus teachers housed in Temporary Reassignment Centers, dubbed “rubber rooms.” Tenured teachers judged to be unsuitable for classrooms or accused of various infractions were contained in what were known as the “rubber rooms.” The average length of stay in a rubber room was 19 months while investigations were conducted. New York City footed the bill for the 757 teachers’ full salaries, full benefits, substitutes, and security guards for the rubber rooms—an estimated cost of \$35 to \$65 million taxpayer dollars (Brill, 2009; Einhorn, 2008; Moe, 2011; Montefinise & Klein, 2007). As Moe (2011) concluded, “The rise of the teachers unions, then, is a story of triumph for employee interests and employee power. But it is not a story of triumph for American education” (p. 65).

In 2014, Discovery Channel produced a show titled, “Bad Teachers,” a crime series based on true events surrounding public school teachers. However, it never saw air time as the NEA pressured the Discovery Channel to not broadcast the show (Higgins, 2014; National Education Association, 2014a; Walsh, 2014). While NEA celebrated this small victory of concealing poor teachers that are being protected by the unions, many jeered the fact that transparency has again been hindered and teachers whose choices had crossed the line would continue to be protected.

### Corruption

Forms of corruption that haunted big labor historically have not escaped the teachers' unions. Continuing to battle corruption from within, teachers' union leaders have inappropriately accessed millions of dollars in membership dues. In 2001, the Washington Education Association illegally seized member paychecks and in an unrelated case, the California Teachers Association leadership misused forced union dues (National Legal and Policy Center, 2000; 2001).

Other examples include the 2002 case of money laundering in the Washington, DC Teachers Union, as well as the 2003 discovery of the United Teachers of Miami-Dade union leader diverting union funds for political use (Moe, 2011; Paige, 2006). The Massachusetts Teachers Union's finance director stole \$800,000 in dues money in 2003, followed by the Maine Teachers Union scandal in which leaders embezzled dues money in 2006 (National Legal and Policy Center, 2006). More recently, in 2008 the treasurer of Philadelphia Local 3845 teachers union embezzled member dues, while in 2009 the Montana local teachers' union president pled guilty to embezzlement (National Legal and Policy Center, 2009, 2010). In 2011, a Broward Teacher Union leader was investigated for misappropriating hundreds of thousands of dollars in dues money (Sunshine State News, 2011).

### Membership Status

Despite the evidence of corruption, wavering public support and perceptions, and a decline in membership, the two union giants still enjoy a combined 4 million person membership (American Federation of Teachers, 2012a, National Education Association, 2011a). Of the 2.4 million educators represented by the NEA in suburban and rural areas,



1.7 million are practicing K-12 teachers, which equates to roughly 71% of the NEA membership. The remaining 700,000 members are comprised of education support professionals, active members for life, agency fee, retired, subscriber, reserve and staff, and students. The revenue from the active teachers equates to \$301.6 million, while the revenue from all other areas is \$44 million (National Education Association, 2013b).

AFT's membership tells a different story. Of their 1.4 million members in predominantly urban areas, the number of teacher members is actually unknown. Critics of the AFT suggest that a fair number of AFT members are classified workers, including janitors, secretaries, bus drivers, cafeteria workers, and paraprofessionals (Moe, 2011). Moe estimates that the AFT represents about 14% of organized teachers, the NEA represents 78%, and that 8% are shared between the two education giants. When teachers are asked to which union they belong, 17% report they belong to AFT, 74% report they are NEA members, leaving 9% shared between the two (Moe, 2011).

Teachers' unions have grown "from humble organizations to behemoths of education policy" (Waters, 2010, p. 17). Spanning the local, state, and national levels, Moe (2011) attributed two big successes to the unending influence that the NEA has on public education: collective bargaining and political fortitude.

### The Successes

#### Collective Bargaining

At the local level, union movement toward collective bargaining brought about many contractual successes. In fact, Moe (2011) indicated that "collective bargaining is a core function of the teachers' unions and the bedrock of their well-being" (p. 233). ISEA

(2011c) defined collective bargaining as, “negotiations between an employer and a group of employees that determine the conditions of employment” (p. 22). Collective bargaining afforded individuals who did not have time or resources to deal with management an opportunity to have labor leaders speak on behalf of them.

Although the 1990’s redefined collective bargaining as a “fragile right that can be threatened by an unfriendly state legislature and/or government” (Strom & Baxter, 2001, p. 296), many successes have resulted. Attainment of higher salaries, improved benefits, and better working conditions resulted from collective bargaining (Masters, 1997; Moe, 2006). Collective bargaining agreements also focus on hiring and firing, promotions, transfers, teacher assignments, class size, number of minutes teaching, duties, faculty meetings, parent conferences, and policies (Moe, 2006; Waters, 2010). There are highly instituted grievance and due process rights, as well as a seniority and tenure system established at the hands of the teachers’ union collective bargaining (National Education Association, 2012d; Waters, 2010). With successes related to wages, benefits, membership, representativeness in public schools, the teachers’ unions have left their mark in public education (Coulson, 2010).

While collective bargaining has brought about huge wins for the teachers’ unions and their members, it has proven to be detrimental at times to the operations of schools. The collective bargaining agreement has created restrictiveness with regard to administrator decisions, expenditures, educational outputs, and bureaucracy (Moe, 2006). Minter-Hoxby (1996) conducted a study about collective bargaining and concluded that it increases district spending, primarily through increased teacher salaries and decreased

teacher-student ratios. More notably, she reported collective bargaining decreased productivity and the impact on school performance was negative.

The notable aspect to the lists of rules outlined in collective bargaining is that unions say they are committed to professionalizing the occupation of teaching and that the point of collective bargaining and all its rules is to ensure the teachers are treated like professionals (Lieberman, 1997). While union officials believe collective bargaining increases professionalism, union opponents view their tactics and rules as labor-like, blue-collar unionism, and de-professionalizing.

### Politics

Beyond collective bargaining, much of the teachers' union clout and power may be attributed to their organized political activities. In the words of Lieberman (2000), the NEA and AFT together "form a political machine of unparalleled size and sophistication" (p. 69). They both have remarkable PACs that support their ample platforms, hold more political operatives than either political party (Troy, 2004), and are considered one of the most influential lobbying group (Center for Responsive Politics, 2012c; Center for Responsive Politics, 2013; Coulson, 2010). At the national level, the teachers' unions utilize their political strength to give them an "unrivaled influence over the laws and regulations imposed on public education by government" (Moe, 2011, p. 6). Teachers' unions have gone further than any other union with regard to legislative efforts and demanding the right to influence their field.

The Center for Responsive Politics, a Washington, DC based nonpartisan, independent, and nonprofit national research group tracking money in U.S. politics,

reported that from 1990 through 2012, the NEA spent \$38 million on federal campaign contributions and ranks 6<sup>th</sup> in the top all-time donors list (2012a; 2012b). In that same time period, the AFT spent \$32.8 million and is ranked 10<sup>th</sup> in the top all-time donors list. To put into perspective the amount of PAC money teacher unions set aside, the combined \$66 million is equivalent to PAC money expended by Chevron, Exxon Mobil, the National Rifle Association, and Lockheed Martin combined. Additionally, the NEA spent \$13.6 million on lobbying activities in the 2011 and 2012 cycles, ranking 77<sup>th</sup> out of 4,368 profiled organizations with lobbying activities in 2012. The top issues lobbied by NEA in 2012 were taxes; education; federal budget & appropriations; labor, antitrust, and workplace; and health issues (The Center for Responsive Politics, 2014a).

With 4 million members, astounding sums of money for campaigns and lobbying, activists, well-financed public relations, and media campaigns, the NEA and AFT have “supremely well-developed organizational apparatuses that blanket the entire country, allowing them to coordinate all these resources toward their political ends” (Moe, 2011, p. 8).

For the purposes of this study, a closer examination of the NEA political structure and endeavors is needed. With a quest for power, ample membership dues, ties to the Democratic Party, an expansive social platform, and vast organizational affiliations, the NEA has a vast political structure that supports its many political activities.

But before delving into the NEA political structure, it is important to recognize the NEA strategic goals and core functions. Goal I is to have strong affiliates for great public schools: Preserving the voice of education professional is critical to the

advancement of public education in America. Goal II is uniting the nation for great public schools/priority schools: All of America's students deserve to be educated in a great public school, and students at greatest risk must be a priority. NEA core functions include (1) research, policy and practice for great public schools, (2) organizing, (3) advocacy and outreach, (4) communications, (5) business operations, and (6) governance (National Education Association, 2013b).

#### NEA's Political Structure

The NEA possesses a Government Relations department, which supports the union's efforts to strengthen public schools, colleges, and universities through federal and state legislation and policies (National Education Association, 2011e). Government Relations advances the NEA Legislative Program through use of lobbyists at the national and state levels and a focus on the NEA's legislative collaborative agenda with external organizations.

The NEA's Committee on Legislation is "responsible for advancing the policies to expand and protect the quality of education and secure its adequate and equitable funding and to develop and recommend the NEA Legislative Program" (National Education Association, 2011e, p. 35). The 2011 Legislative Program put forth by the NEA includes a focus on high quality public education, supporting student achievement, a voice in the workplace addressing employee issues, and "good public policy related to ongoing concerns of national importance" (National Education Association, 2011e, p.336).

The NEA established a Campaigns and Elections unit, which develops and implements strategies to support pro-public education candidates and advance priorities in political, legislative, and other campaigns (National Education Association, 2011e). The Campaigns and Election unit is divided into five key areas.

The first, the Campaigns Unit, supports political mobilization, grassroots organizing and advocacy, ballot initiative campaigns, legislative crisis efforts, and online organizing, as well as the promotion of positions on public education and workers' rights with candidates, political parties, and other like-minded organizations. Second, the Field Operations Unit provides direct support to state and local affiliates for grassroots mobilization and legislative advocacy. Third, the Independent Campaigns Unit helps state affiliates with independent communications activities related to issue advocacy, independent expenditures, coalitions, ballot measures, and non-partisan voter registration/education/get-out-the-vote activities" (National Education Association, 2011e, p.63). Fourth, the Strategic Federal Initiatives unit focuses on "building institutional relationships with the White House and federal agencies on behalf of NEA, its members and students" (National Education Association, 2011e, p.64).

Additionally, the NEA established the NEA Fund for Children and Public Education (NEA Fund) Political Action Committee (PAC) in 1972, with the intent of providing direct financial support to political candidates (NEA Fund, 2012b; Waters, 2010). The NEA Fund "works to ensure that pro-public education candidates are elected to public office by making direct contributions to candidates who are recommended by

the NEA Fund Council- the NEA Fund's governing body (National Education Association, 2011e, p.63).

Identifying a three-pronged approach to build "sustainable, long-term power," the NEA Fund focuses on (1) community and labor organizing around common issues, interests, and values, (2) progressive public policy, and (3) electoral mobilization (National Education Association Fund, 2011a, p. 7 & p. 12). Moreover, the NEA Fund also established "GO," a new online fundraising website spurring grassroots donations and action (National Education Association Fund, 2012c).

In 2010, NEA established the NEA Advocacy Fund as a Super PAC, with the intention to raise funds in unlimited amounts (Federal Elections Commission, 2010). Super PACs are also known as Independent Expenditure-Only Committees (Federal Elections Commission, 2012). NEA is now considered to have one of the largest Super PACs established in the nation (Center for Responsive Politics, 2013; Ed Week, 2011). Under the eye of the Federal Elections Commission, Super PACs may raise unlimited sums of money and then spend those funds to overtly advocate for or against political candidates. However, Super PACs are prohibited from donating money directly to political candidates, like traditional PACs (Garrett, 2011). During 2010, the NEA Advocacy Fund established itself as the fourth largest Super PAC and expended \$4,199,000 of their \$4,200,000 in campaigns against Republicans (Center for Responsive Politics, 2011).

In the NEA Statement on Campaign 2008 Expenditures, the NEA stated openly that it funds independent campaigns to help defeat candidates who oppose the interests of

educators and public education (National Education Association Fund, 2012b). The NEA self-disclosed that the \$50 million budget for the 2008 election included contributions from the NEA PAC, and that \$20 million was used to address state ballot measures that they believe directly affect NEA members (National Education Association, 2008).

The NEA gives funds to political and ideological organizations, contributes to ballot initiatives, creates mailing and emails lists, employs political staff, and coordinates campaigns with political parties. To further support the political activities of the union, the NEA has established a voter-identification program, voter lists, get-out-the vote efforts, strategic political plans, and has bankrolled campaigns (United States House Committee Sub Committee on Work Force Protections, 2002). Richards and Harsh (2004) reported that the NEA also provides detailed political assessments and reports, politically charged publications, and polling services.

Lastly, in December of 2010, the NEA Directors established the Affiliate Defense Fund under the Ballot Measure Legislative Crisis Fund that allows for “allocations based on targeting legislative threat levels” (National Education Association, 2010). Moe (2007) confirmed this avenue of influence by acknowledging massive memberships, deep financial pockets, and extensive political organization that includes full-time lobbyists, campaign workers, and large campaign contributions. Moe contended that the NEA has the power to “bring their interests to bear in electoral and policymaking arenas at all levels of government” (p. 16).

### Power Player



The NEA has evolved from an entity with a narrow focus that addressed the bleak, paternalistic conditions of one-room schoolhouses into a national powerhouse with a broadened scope of influence. Historically, political action on the part of the teachers' union ensured that "schools [were] adequately equipped and staffed" and addressed whether school employees [were] treated as valued professionals and partners" (National Education Association Representative Assembly, 2012, para. 1). Moe (2011) argued, "By comparison to other interest groups, and certainly to those with a direct stake in public education, parents, taxpayers, even administrators—the teachers unions are unusually well-equipped to wield power" (p.280).

Throughout the history of the NEA, leaders consistently sent the message about acquiring power and utilizing that said power to move the NEA priorities forward. Paige (2006), recounted the following about the NEA,

Education is hardly a one-size-fits-all issue, and there are clear advantages in leaving educational control in the hands of local school boards and parents. However, this was a hindrance for unions and their special interests. Rather than fight the same battle in thousands of school districts, teachers' unions knew it would be much easier to simply have Congress pass laws that compelled all states to comply. So, the teachers' unions simply set out to control education at the source of political power, at the top of the federalist structure. (p. 37)

This quest for power and political reordering is examined in the following quotes. "In 1974, NEA president Helen Wise flatly enunciated a new ideological dictum: 'We must reorder Congressional priorities by reordering Congress. We must defeat those who oppose our goals'" (Paige, 2006, p. 37). Just a few short years later, Former NEA Executive Director Terry Herndon reaffirmed the desire for the NEA to "tap the legal, political and economic powers of the U.S. Congress. We want leaders and staff with

sufficient clout that they may roam the halls of Congress and collect votes and reorder the priorities of the United States of America” (Association of American Educators, 2010).

In 1982, former NEA president Mary Hatwood-Futrell outlined the NEA’s priorities by stating, “The major purpose of our association is not the education of children. It is or ought to be the extension and/or preservation of our members’ rights. We earnestly care about the kids’ learning, but that is secondary to the other goals” (Providence Business News, 2010, para. 7). Later in 1997 at the National Press Club, former NEA President Bob Chase stated, “[NEA has] used [its] power to block uncomfortable changes, to protect the narrow interests of its members, and not to advance the interests of students and schools” (Moe, 2011, p. 247).

This certainly bolsters the perceptions shared by The Kamber Group (1997), a consulting firm hired by the NEA to improve its public image. The Kamber Group found that the general public held the perception that the “NEA is a monolithic union that looks out for number one at everyone else’s- including kids’ – expense” (p. 31). The Kamber Group continued on,

In many political and legislative battles, the NEA has been well-served by this perception- and, of course, the reality behind it. But from a message standpoint, it contributes to the notion of the Association as a gargantuan special interest group - and this is not consistent with the objective of *portraying* the NEA concerned first and foremost with our children. (p. 18)

The Kamber Group then advised the NEA to “shift to a crisis mode of operations” and take action to address the “inside-the-beltway, highly partisan, 800 pound gorilla” (p.39). They recommended that the NEA place less focus on partisan politics (Paige, 2006):

We don't want to mess with success, and so we have no significant substantive suggestions about how the NEA makes its members' voices heard in the political and legislative arenas. But we do think politics and government relations should take a lower media profile for a while, with the sole exceptions of occasions when the NEA endorses Republicans. (p. 39)

In addition to amassing great power and wealth, the NEA regards itself as a champion for teacher rights. That said, Bob Chanin, retired NEA General Counsel, suggested that the means to attaining teacher rights still boils down to power. Chanin stated the following in his 2009 Annual Meeting address:

Despite what some among us would like to believe, it is not because of our creative ideas, it is not because of the merit of our position, it is not because we care about children, and it is not because we have a vision of a great public school for every child. NEA and its affiliates are effective advocates because we have power. And we have power because there are more than 3.2 million people who are willing to pay us hundreds of millions of dollars in dues each year because they believe that we are the union that can most effectively represent them; the union that can protect their rights and advance their interests as education employees. This is not to say that the concern of NEA and its affiliates with closing achievement gaps, reducing drop rate rates, improving teacher quality, and the like are unimportant or inappropriate. To the contrary, these are the goals that guide the work we do. But they need not and must not be achieved at the expense of due process, employee rights, or collective bargaining. (Chanin, 2009)

The power that the NEA leadership sought could not be accomplished without financial strength and the mechanisms to attain and maintain desired influence and control. However, transparency about the finances, especially as it applies to politics, has been argued to be opaque.

### Transparency

With a \$360 million budget in 2010, the NEA has ample financial resources to pursue the activities of its choosing (United States Department of Labor, 2011a). Similar to ISEA, contributions to the NEA Fund PAC are considered voluntary and in addition to the regular membership dues. Paycheck protections have been instituted across states that allow union members to opt out of paying dues designated for political contributions. Coincidentally, as states began adopting paycheck protections, high proportions of members opted out of political contributions (Hoover Institute, 2012).

NEA provides a detailed breakdown of how membership dues are spent. The largest area, Supporting Strong States and Locals focuses on support to the UniServ program and such things as bargaining training. Improving Teaching and Learning, although a minor part of the budget, encompasses efforts related to quality teaching and lowering achievement gaps.

Leadership Development and Constituency Support includes support for conferences, training, and member leadership development. Legal Support is provided through UniServ and other insurance benefits to members. Governance is an area in which funding supports member participation and the NEA governing bodies. Administrative Support includes costs associated with NEA business operations. A small Contingency fund is also set aside for national, state, or local emergencies.

Notably, there are two areas of concern when examining how membership dues are allocated. Ten percent of membership dues are allocated for Partnerships and Public Relations with “diverse supportive organizations” (Iowa State Education Association, 2011c, p.16). When closely examined, the partnerships and affiliations most often have a

liberal or progressive political affiliation. Of further concern is that 8% of membership dues supports Legislative and Ballot Initiative Action, including “bipartisan support for public education that includes lobbying, government relations, state ballot initiatives and legislative crisis fund, cyber lobbyists, members’ education and mobilization on political issues” (Iowa State Education Association, 2011c, p.16). Table 2 provides a synopsis of the budget priorities of the NEA for 2011-2012 as it represents the use of dues from one member.

Table 2

*2011-2012: How NEA Dues Were Allocated*

Allocation	Dollar Amount	Percentage of Dues
Improve Teaching and Learning	\$7.44	4.5
Support Strong States and Locals to Protect Members' Interests	\$57.44	34.6
Partnerships and Public Relations	\$17.18	10.3
Legislative and Ballot Initiative Action	\$13.87	8.4
Leadership Development and Constituency Support	\$5.32	3.2
Legal Support	\$17.83	10.7
Governance	\$6.13	3.7
Administrative Support	\$39.41	23.7
Contingency	\$1.38	0.9
	\$166.00	100.0

Source: 2011-2012 Member Resource Guide

Again, 12% of membership dues are spent under the Strong Affiliates for Great Public Schools category, in which NEA cites use of dues for ballot measures and legislative initiatives. Also worth noting, 3% of the membership dues are applied to “Research, Policy, and Practice” with a focus to “expand, improve, and enhance pro-public education policy,” presumably with political activities (Iowa State Education Association, 2013, p. 16). It is now unclear where the allocations for organizational partnerships that were formerly under Partnership and Public Relations are being funded from. Table 3 provides the updated fee schedule with the 2013-2014 membership dues and the categories for the expenditures.

Regardless of how NEA indicates dues are spent year after year, there is much evidence to suggest that membership dues may be utilized for political activities. This is of significant concern because of the assurance the NEA provides that member dues are not utilized for political activity. The NEA Statement on Campaign 2008 Expenditures (National Education Association, 2008), expressly states, “NEA is prohibited from using dues money for candidate contributions or expenditures,” meaning that only voluntary contributions set aside for political activity may be legally used toward campaigns, candidate endorsements, or other political expenditures. However, former NEA General Counsel Robert Chanin acknowledged that it was difficult to “separate the NEA’s collective bargaining from politics – you just can’t... It’s all politics” (Richards, Harsh, & Miller, 2004, para. 12).

In his 2002 testimony Congress, former NEA leader Robert Williams “discussed the political power of the National Education Association (NEA) and the illegal and illegitimate methods the union uses to build and maintain its power, including the unauthorized use of dues taken from unwilling teachers.” Williams went on to say, “What the teacher union does to its members may be the last institutionalized civil rights violation remaining in our nation” (United States House Committee Sub Committee on Work Force Protections, 2002, para. 4).

Table 3

*2013-2014: How NEA Dues Were Allocated (Modified)*

Allocation	Dollar Amount	Percentage of Dues
Strong Affiliates for Great Schools	\$22.20	12.4
Uniting the Nation for Great Public Schools	\$6.73	3.8
Research, Policy, and Practice	\$4.99	2.8
Organizing and Operational Support to Affiliates	\$51.16	28.6
Member Advocacy and Outreach	\$9.87	5.5
Legal and Insurance Support	\$21.34	11.9
Communications	\$17.27	9.6
Business Operations	\$37.36	20.9
Governance	\$6.53	3.6
Contingency	1.55	0.9
	\$179.00	100.0

Source: *NEA 2013-2014 Modified Strategic Plan and Budget*

Paige (2006) suggested the NEA has expressly advised PAC fundraisers to blur the distinctions between political action and membership drives when suggesting that they should:

Combine PAC fundraising and the Association's membership drive, [to] avoid separate drives by asking people to join the Association and give to the PAC at the same time. Building a unified commitment to political action means giving each Association member the *opportunity to contribute his/her fair share* to PAC. (p. 115).

Margasak and Solomon (2002) asserted that UniServ staff funded by the NEA membership dues are really political operatives involved in developing and/or executing local association political action. In the 2000 IRS Complaint v. NEA, the Landmark Legal Foundation further clarified that:

UniServ directors are on the ground working at developing and/or executing local association political action, community development, community/public relations, legislative support and professional development activities and program... and coordinating and advocating national and state association programs and priorities with local associations and members. (As cited in Paige, 2006, p. 117)

In summer of 2014, the NEA Representative Assembly recognized the need for growing transparency. Several new business items were referred to committee. One particular item addressed the transparency of engaging with corporate sponsors, leading to a proposed list of corporate sponsors being available to NEA members. Additionally, another new business item was sent to committee, centering on NEA's disclosure of actual sources of operational revenue not generated by membership dues, including funds from non-profits, sponsors, corporations, foundations, philanthropists, and other organizations who have partnered with NEA. Lastly, the one business item indicated that



NEA will inform members about money directly received by third parties before doing anything with it (National Education Association, 2014b).

### Democratic Friends

The NEA makes no secret of their political activism and strength and claim they befriend politicians from either major political party. According to NEA Fund PAC, they collect “voluntary contributions from Association members which are used for political purposes, including, but not limited to making contributions on behalf of friends of public education who are candidates for federal office” (National Education Association Fund, 2011b). As part of PAC fund expenditures, “NEA provides direct financial support to recommended candidates for President, the U.S. House, and the U.S. Senate, [as well as] pro-public education candidates in gubernatorial and other important state races” (National Education Association Fund, 2011b). The NEA former president, Keith Geiger stated, “As one of the most democratic organizations in the world, NEA policy reflects the different perspectives of the association’s vast and diverse membership” (Richards & Harsh, 2004). The NEA states they do not consider a candidate’s political party when making these recommendations (Jordan Education Association, 2011).

However, the record shows that the NEA has historically aligned with the Democratic Party. Of the \$36.1 million spent on federal campaign contributions between 1990 and 2014, 93% was allocated to Democratic candidates or the Democratic Party (Center for Responsive Politics, 2014b). NEA has evolved into a large, influential organization in education and has even been characterized as a “big, powerful arm of the Democratic Party... a special interest group... that is not consistent with the objective of

portraying the NEA [as] concerned first and foremost with our children” (The Kamber Group, 1997, p. 18). In fact, the NEA has only endorsed Democratic candidates for president since its first endorsement of Jimmy Carter in 1976 (Richards & Harsh, 2004).

Democratic Senator Bob Graham provided NEA a framed quote for the NEA’s Washington headquarters that stated, “No presidential candidate who wants to win in November ignores the National Education Association anymore” (as cited in Paige, 2006, p. 110). Former Vice President Walter Mondale said in 1980, “I’ve learned that if you want to go somewhere in national politics these days, you better get the NEA behind you” (Clark, 1980, para 41).

Paige (2006) also indicates that the NEA has veto power over activities of the Democratic Party. Historically, the NEA has also been a key constituent in the National Coordinated Campaign Steering Committee, whose main function was to coordinate Democratic political campaigns (United States House of Representatives Education and Workforce Committee, 2002). *Wall Street Journal* writer, William McGurn (2001) stated, “Those of us who have long dismissed the National Education Association as a tool of the Democratic Party have been badly mistaken. Apparently, it’s just the opposite... it’s the Democratic Party that is the tool of the NEA” (as cited in Federal Observer, 2012). To further illustrate the partnership between the NEA and Democratic Party, in a 1986 publication, *NEA Series in Practical Politics*, the following was expressed:

The Democratic Party does bestow a considerable amount of power to its larger financial contributors, but the Democrats depend more heavily on the organizational strength of large membership organizations, like NEA, for the ‘people power’ they bestow. The Democratic Party has traditionally been more receptive to NEA, in part because the Democrats cannot pay for the time and

services provided for free by hundreds of [National Education] Association members. (Richards & Harsh, 2004, p. 7)

NEA most often endorses liberal leaning political candidates and organizations with whom many NEA base members do not align (Glenn, 2008; Honawar, 2008; National Education Association, 2006; Pioneer Institute Public Policy Research, 2009). Between 1990 and 2012, 81% of donations made by National Education Association political action committees went to Democrats, while 6% went to Republicans (Center for Responsive Politics, 2012b). As of February 2012, 37 political candidates whom the NEA supported were listed on the NEA website. Of the candidates listed, 97%, or 36 were Democrats and 3% or one was an Independent (National Education Association Fund, 2012d).

Interestingly, former NEA president, Bob Chase stated that NEA members were “not majority Democratic.” He went on to say that NEA “membership breaks down very similar to the general public as far as percentage being Democratic, Republican, and Independent” (Hoover Institute, 2012, para. 2). Furthermore, in the *2006 Status of the American Public School Teacher* survey by the NEA, 55% of teachers considered themselves “conservative or tends to be conservative” and have reported themselves as politically conservative over politically liberal in every survey since 1971. Additionally, 41% reported themselves as Democrats, 29% as Republican, 2 as “other,” and 29% had no affiliation (National Education Association, 2006). This gives pause when one considers that a large percentage of NEA expenditures went to Democrats or the Democratic Party (Center for Union Facts, 2014; Richards & Harsh, 2004).

These statistics clearly depict the disconnect between NEA political spending and members' personal politics persuasions. While the NEA leadership touts bipartisanship, their actions speak volumes about their allegiance politically and provide an incongruent message about their political leanings (Hoover Institute, 2012). In addition to their strong ties with the Democratic Party, the NEA also expends a great deal of its political capital on its progressive agenda.

Most recently, the NEA Representative Assembly adopted a business item which calls for the resignation of U.S. Education Secretary Arne Duncan as part of President Obama's team. This is considered an atypical action on the part of NEA given that a Democratic administration is at the helm. The request for resignation came after the NEA criticized the Department of Education's failed education agenda and policies and decisions the NEA believes undermines public schools, teachers, and educational unions (National Education Association, 2014b).

#### A Platform to Stand On

The NEA's ambitious and wide-ranging agenda is expressed in resolutions, "which the NEA has had since their founding in 1856 as a way for the NEA to make unified statements regarding specific issues" (Association of American Educators, 2010, p. 10). The resolutions are some of the NEA's basic philosophical opinions, intentions, beliefs, or positions that may call for action or may indicate support for or opposition to federal legislation (National Education Association, 2011e). These resolutions are to be "consistent with the goals of the Association as stated in the Preamble" (National Education Association, 2011e, p.173).

On their Legislative Action Center webpage, the NEA expresses they are in support of common issues and public education (National Education Association, 2012a). This list of “common issues” appears in the 108 pages of the *2011-2012 NEA Resolutions* (National Education Association, 2011b) and represents a “progressive public policy agenda” (National Education Association Fund, 2011a, p. 7). The Resolutions Committee is dedicated to steering the course of the resolutions toward adoption (National Education Association, 2011e). Through the Resolutions, the NEA and its state affiliates are influencing not only public education, but also other contested social and political issues.

The updated *2013-2014 NEA Resolutions* put forth 10 broad categories, 32 specific categories, and 365 resolutions. Of course, many relate directly to education and include such things as early childhood education, reading skills, attendance, dropout prevention, higher education, alternative learning programs, special education, English Language Learners, multicultural education, fine arts education, and physical education. Additionally, many resolutions are labor-related. Some examples of labor-related resolutions include collective bargaining, contracts, salaries, benefits, reduction in force, and workplace bullying (National Education Association, 2013a).

However, within the *2013-2014 Resolutions*, the NEA weighed in on issues that many believe are removed from the classroom. These included capital punishment, nuclear facilities, tax reform, reproductive freedom, extremist groups, social security, torture, gun regulation, genocide, Medicare, covert operations and counter intelligence, international court justice, world hunger, consumer protections, trade sanctioning, traffic

safety, redress for slave descendants, and climate change (National Education Association, 2013a).

Other issues and activities that may not be considered a direct tie to the classroom have been approved and/or referred for Representative Assembly business in the 2011 NEA Handbook (National Educational Association, 2011e). Some of these issues include Human Papillomavirus, wreath at the Tomb of the Unknown Soldier, indoor air quality training, cell phone use while driving, breast cancer screening, gender neutral restrooms, a tribute to President Jimmy Carter, and postal delivery. Additional measures promoted in the Legislative Program's "Good Public Policy" section relate to affordable housing, energy, environment, health care, jobs/economy, senior citizens, stalking, racial profiling, Italian-born immigrants, the U.S. Institute of Peace, prison funding, Hawaiian land ownership, credit unions, war-profiteering, nuclear attack evacuations, and immigration and visa restrictions (National Educational Association, 2011e).

There appears to be a dichotomy with how these platform issues may be categorized and that categorization is certainly dependent upon the lens with which one examines them. To some, many of these issues may be characterized as having nothing to do directly with education and they serve more as a detractor than enhancer to public education. However, to others, the social issues identified may indeed be inherently tied to education and are vital to progressive mission laid out by NEA. So perhaps the issue to contend with may not be the exhaustive list of platform topics or whether they can be categorized as educational or non-educational, but whether the NEA leadership stances on the identified issues reflect the values and beliefs of the NEA members.

Aldridge-Sanford (2006) reported that “NEA members and others communicate their frustration with NEA for taking on issues that seemingly have nothing to do with education” (p. 101). Only 19% of teachers’ union members believe that at the national level their union’s policies “almost always reflect their values and preferences, while 47% say this is sometimes the case” (Farkas et al., 2003, p. 18). Based on this statistic, it appears as though a disconnect may exist between the national level policies and how they represent individual members.

A senior policy analyst was quoted as saying that “Many teachers would probably be concerned by the unions’ far left agenda” (Honawar, 2008, para 19). Honawar also suggested that teachers may also be surprised to learn of the use of their money to fund individuals and groups with which they do not personally align. As suggested by the Richards and Harsh (2004), “The union’s lobbying efforts have very little to do with ensuring that excellent teachers are recruited and well compensated and that students are literate and ready for the world of work and citizenship” (p.3). This is reiterated by the Association of American Educators (2010), who stated that many of the NEA resolutions “serve neither the NEA’s mission of ‘advocating for professionals’ and ‘preparing every student to succeed,’ nor teachers’ number one goal of helping students learn” (p. 10).

### In Good Company

As part of their political prowess, NEA expends a great deal of money to support organizations and causes outside of education that may or may not align with members desires. Supporting their progressive underpinnings, the NEA states a core service area is to “develop partnerships that engage the ethnic minority, labor, faith-based,

environmental, philanthropic, educational, civil and human rights, and business communities to enhance our ability to achieve great public schools for every student” (National Education Association, 2011e, p. 39).

Additionally, NEA specifies they will “conduct political, legislative, and issue campaigns” with one aspect being to partner with “non-traditional allies, third party validators, key legislators and committees” at the tune of \$37.5 million. This equates to 87% of the allotted budget for Strategic Goal I: Strong Affiliates for Great Public Schools and 11% of the modified revenue for 2013-2014 (National Education Association, 2013b, p. 12). Additionally, NEA identified they will spend \$1.3 million to “build and maintain partnerships and relationships with educational, social and community organizations that will meaningfully and measurably advance NEA’s Great Public Schools criteria and local, state, and federal policy agenda” (National Education Association, 2013b, p. 24).

Organizations receiving NEA funds in recent years include a number of entities associated with the Democratic Party or a progressive platform. To support this core service area of partnerships, according to the NEA’s form 990’s, the NEA expended \$78 million in grants and gifts to organizations between 2003 and 2009 (Foundation Center, 2012). New disclosure rules creating transparency about union expenditures prompted the *Wall Street Journal* (2006) to label the union as a “honey pot for left-wing political causes that have nothing to do with teachers, much less students.” Supporting this sentiment, Lieberman (1997) argued that the NEA indeed prioritizes non-educational issues over educational issues. Some of the non-education, partisan groups receiving funds in recent years are included in Table 4.



Table 4

*Organizations Receiving NEA Funds*

Organization	Organization Purpose/Focus
America Votes (2014)	Advance progressive policies
American Constitution Society (2014)	Nurture the next generation of progressive professionals
Association of Community Organizations for Reform Now (ACORN) (2014)	Provided advocacy for low and moderate income families (now disbanded)
Ballot Initiative Strategy Center (2014)	Provide research and capacity building for progressive ballot initiatives
Campaign for America's Future (2014)	Provide policy research for progressives
Catalist (2014)	Provide communications for progressive mobilization
Committee On States (2014)	Strengthen state progressive political networks
Democratic GAIN (2014)	An association for progressive organizations
Democratic Leadership Council (2014)	Modernizing progressive political traditions
Netroots Nation (2014)	Amplify progressive voices through technology
People for the American Way (2014)	Equip communities to promote progressive policies and programs
Planned Parenthood	Provide sexual and reproductive healthcare
US Action (2014)	Provide civic education and mobilization to elect progressive champions

Notes. The list of organizations provided at Foundation Center (2012). Each organization's description was retrieved from their respective websites, which are highlighted in the References.

Additionally, the “Labor-Management Reporting and Disclosure Act , which is enforced by the Office of Labor-Management Standards, requires labor unions to file annual reports detailing their operations. Contained in those reports are breakdowns of each union's spending, income and other financial information” (Union Facts, 2014, para 1). As it relates to contributions, gifts, and grants, the amount provided in 2012 is much higher than previous years combined. The NEA reported providing \$85.6 million for contributions, gifts, and grants (Union Facts, 2014).

### The Disconnect

The NEA has internally conveyed its awareness of a potential great divide among members and leadership. In *Building A PAC Program That Works* (2011a), NEA Fund leadership reflects back on how they may not be representing their member’s attitudes, beliefs, and values. Leaders suggested,

Too often, our communications with members are one-sided. We frequently ask members to take action— send an e-mail, support an issue, vote for a candidate. How often do we ask members what they think or what they care about? Do we really listen when they respond? If we don’t value members’ opinions, we risk them becoming cynical or tuning out. (National Education Association Fund, 2011a, p. 15)

However, to understand this potential divide, it is first important to understand the NEA governance process in place that may be contributing to the divide. Nine thousand members constitute NEA’s Representative Assembly (RA), the primary legislative and policy-making body of the union. “It derives its powers from and is responsible to the membership” (National Education Association, 2011e, p. 15). The RA delegates are charged with representing the average rank-and-file member (Jordan Education

Association, 2011). When advocating for the NEA, the leadership takes direction from the RA's recommendations (Jordan Education Associations, 2011).

The NEA believes the RA provides members an opportunity to be heard. The NEA stated, "Educators belong to the unified Association because they get a substantial say in policies and activities at the local, state, and national levels through a democratic structure" (Vermont National Education Association, 2012). However, 51% of union members polled indicated that "most union decisions are made by a small group of deeply engaged veteran teachers and staff" and only 46% believe the teachers' unions are "absolutely essential" to the betterment of education (Farkas et al., 2003, p. 18).

As Hurd (2000) suggested, "Although the most effective organizing strategies are those carefully tailored to the concerns and inclinations of the workers in the unit, the differences between those being organized and those doing the organizing can sometimes complicate matters" (p. 9). Hurd continued, "Typically, those workers who are most adamantly pro-union take the lead in organizing campaign, and they may well want to push their co-workers to activism" (p. 9). This may reflect the need of NEA leadership to want something politically more so than their members may desire.

In addition, some NEA leaders have identified a frustration with an incongruence in member word and action. As suggested in *Building a PAC Program That Works*, "In a recent poll, two-thirds of NEA members responded that they wanted their association to be involved in politics. Still, most members will still have little or no history making political donations" (National Education Association Fund, 2011a, p. 18). Additionally, only 12% report involvement in political activity (National Education Association, 2006).

Confirming this notion, 66% of teachers' union members reported that "other than receiving mailings and notices, they aren't involved with their local union" (Farkas et al., 2003, p. 18). Brimelow (2003) claimed that the apathy of NEA members is so great that most of them don't even know which of the two major unions they belong to.

Recognizing this disinterest or lack of involvement, NEA Fund leaders have looked within for answers that leaves them asking,

We ask for help, and get 'no' or silence for our answer. Sometimes we call this 'apathy' and even blame members for not caring about what we care about. But have we ever had a genuine conversation with members about their concerns, hopes, fears, and what they want to see their collective power achieve? (National Education Association Fund, 2011a, p. 16)

Beyond disappointment with members' lack of involvement in the Association, NEA leaders also struggled with members' unwillingness to donate extra money for political activities. As best summed up by the NEA's former General Counsel Robert Chanin in 1978 U.S. District Court hearings,

"It is well-recognized that if you take away the mechanism of payroll deduction you won't collect a penny from *these people*, and it has nothing to do with voluntary or involuntary. I think it has to do with the nature of the beast, and the *beasts who are our teachers*...They simply don't come up with the money regardless of the purpose." (Lieberman, et al., 1994, p.57)

Chanin's comments did not stop there. Later in 2000, he also stated, "Getting permission from teachers for the union's political activity each year is a 'royal pain in the ass'" (Richards & Harsh, 2004, p. 10).

Many of their own members and non-members who are forced to pay dues, would like the teachers' union to concentrate on educational issues and stay out of partisan politics (Association of American Educators, 2010). A list of common objections

NEA leaders hear from state affiliate members includes the suggestion that, “The affiliate should focus on contracts and stay out of politics. Politics only divides members from one another. Too much of our money is going to politics when it should be going to taking care of our issues” (National Education Association Fund, 2011a p. 88). Along the same lines, “The association is divorced from the concerns of rank-and-file members. The association hasn’t done anything for me. The association is out of touch” (National Education Association Fund, 2011a p. 88).

Paige (2006) stated “As unions become increasingly large and political, they are less able to address the needs of individual workers. Everyone is either benefited or harmed collectively” (p. 30). In line with these sentiments, an NEA member expressed the following comments in February 2012, on the online NEA’s Reader Comments:

Each of us should have a strong conviction; the total dedication and education of our students. That is something we can strive to achieve without worrying about what each of us do in a voting booth. I think our PAC has taken our ability to think and reason on our own for granted and have championed candidates based on weak principles...I think the PAC needs broader guidelines to follow if they are going out-on-a-limb to tell the membership to think one way. After all, we are educators. Tell us how to teach better. Not how to vote. (National Education Association, 2012c)

A December 2011 NEA Member Survey conducted compared the political beliefs and preferences of rank-and-file members and activist members (e.g., elected leaders, Obama volunteers, NEA fund Contributors, and Legislative Action Center activists). Throughout the findings, a disconnect became evident with activist members portraying a more progressive or liberal stance by an average margin of 10 percentage points on most questions. For example, 44% of members indicated they are “not currently supporting” President Obama, while 30% of activists responded the same way. Another example

includes the disapproval rating of President Obama- 37% of members disapprove, while 25% of activists disapprove of his performance.

Ultimately, the findings led to the following conclusions: (1) “We need to educate *persuadable* members about Obama’s record and his strong advocacy for children and the middle class;” (2) “We need to raise the stakes in the election, emphasizing that the loss of a goalie at the federal level could be disastrous to our members;” and (3) “We need to energize and mobilize members to support Obama, even if it means concentrating on educating them about *how bad the alternative is*” (National Education Association, 2011f, p. 13).

Teachers may agree or disagree with the union’s social and political agenda. But many NEA members believe it is wrong for union officials to charge for workplace representation, then use the money to promote their own, unrelated agenda (Richards & Harsh, 2004). An NEA member stated, “I am so tired of the NEA and the [Washington Education Association] telling us how to vote and taking my dues to support issues I do not endorse. Use my money to help the professional needs of being a teacher, not [the] leftist political machine” (National Education Association, 2012c). Yet another NEA member identified, “There are many things that go into deciding for whom to vote. A candidate’s opinion on educational issues should be one item and not the only one as [Virginia Education Association] and NEA are saying” (National Education Association, 2012c).

Despite the incongruence, the NEA’s asserts, “When education employees vote to be represented by an NEA affiliate and become a member of the Association, they

understand they are supporting an organization that will advocate for *their* interest in the legislative and political arenas” (National Education Association, 2008). As Salvato (2004) suggested, there is no recourse for educators who are not aligned with NEA’s liberal policies other than to become disenfranchised.

### Those Who “Get It”

In *Building A PAC Program That Works* (2011), the NEA Fund leadership refers to a base of members who “get it” (National Education Association Fund, 2011a p. 31). This categorization is defined as the “the members who love their association and who are on board with its legislative and political program fully, regardless of the issue” (National Education Association Fund, 2011a, p. 31). Other categories of those that “get it” are the “politicos” and “those who identify as progressives” (National Education Association Fund, 2011a p. 31).

When exploring the NEA from these various aspects, it could be implied that the base of the largest and most influential union in the nation is comprised of members who “get it” merely because of their willingness to go along with the progressive agenda, “regardless of the issue” (National Education Association Fund, 2011a p. 31). This may suggest that the NEA is largely a political entity that does the talking for individuals without regard to their stance on the issues, thus minimizing the opportunity for free expression and affiliation.

### The Profession of Education

Many NEA members refer to their organization as an association or “professional union” (National Education Association, 2012d). Recognizing the stigma that some

associate with the labor union label, it has sought to portray a more professional tone.

Aside from the labels however, the NEA is classified by the Internal Revenue Service as a union (2012a). While the thought of a “professional union” may resonate with teachers’ union members, by outsiders, the two terms together are often considered contradictory.

In the following section, the definitions of a profession and the differences between unions and associations are explored.

### Profession Defined

The term profession used to be reserved for members of the clergy, doctors, lawyers, and teachers (Woodward, 1998). Today, Oxford English Dictionary (2012a) defined a profession as: (1) An occupation in which a professed knowledge of some subject, field, or science is applied or (2) a vocation or career, especially one that involves prolonged training and a formal qualification. D’Amico (2010) suggested that “Professional stature is sustained by a series of boundaries regulating who may come in and, even more importantly, who must stay out of the profession” (p. 5).

There is much to a profession than cannot be posited in a short definition. Rutledge (2011) suggested that a profession is characterized by the following: (1) great responsibility, (2) accountability, (3) specialized, theoretical knowledge, (4) institutional preparation, (5) autonomy, (6) direct working relationships, (7) ethical constraints, and (8) based on merit. Interestingly, when providing further clarification about the quality of merit, Rutledge stated that “Members achieve employment and success based on merit and corresponding voluntary relationships, rather than on corrupted ideals such as social principle, mandated support, or extortion.” Rutledge continued, “A professional must



hold with and operate according to the inviolate principles of his moral foundation— and be free to do so” (p.4-5). To further distinguish professionals and non-professionals, Rutledge also expressed that “Professionals make deliberate choices where others have choices made for them or they simply react to what comes their way” (p. 9).

### Education as a Profession

Educators have sought to be considered professionals for decades. However, a notable push for increased professionalism in education came at the hands of the policy makers during the mid-1980’s in their attempts to increase the number of quality teachers. Woodward (1998) suggested, “Teachers have almost always been viewed either as conservative and preservers of tradition, or as radical and inciting society’s youth to engage in subversive thought” and goes on to say that many educators “neither look nor act professional” (p.3). Not unlike their labor union counterparts, public educators are often considered an impediment to municipalities and are recognized as the largest consumer of public funds. With that in mind, the view of teachers as indentured public servants continues to trivialize their professional standing (Cameron, 2005). Scholars have traditionally placed teachers outside the bounds of profession, regarding them as a highly regulated, majority female group without possession of exclusive knowledge (D’Amico, 2010).

U. S. Education Secretary, Arne Duncan, declared in 2009, that “Teaching is still not treated as a profession.” D’Amico (2010) stated “The ways in which administrators, teacher educators, and teachers, through their unions, contest the terms of professional stature represents a fundamental struggle for power that transcends schools” (p. 4).

Rather than redefining the meanings of profession, D'Amico (2010) suggested that through their union, teachers appealed to traditional constructions as a way to bolster their authority and stature in, and especially out of, the schools.

### Associations and Unions

An association is defined as “The action of combining together for a common purpose,” or “A body of persons who have combined to execute a common purpose or advance a common cause” (Oxford English Dictionary, 2012b). Professional associations understand the concerns of the workers they aim to attract, actively promote the profession they represent, and provide a base of information for members (Hurd, 2000). Professional associations are integral to establishing, maintaining, and enhancing professional identity. Additionally, associations set educational criteria for membership, adopt a codes of ethics, and engage in political activity related to licensing and continuing education (Ritzer & Walczak, 1986). Hurd (2000) suggested that higher status professions have stronger associations, while lower status professions tend to have weaker associations.

As identified by the United States Department of Education (2012a), public education is comprised of many state and national associations. These associations express their interests related to subject matter (e.g., Iowa Council of Teachers of Mathematics or International Reading Association), role (e.g., School Administrators of Iowa or American Association of School Librarians), grade level (e.g., National Middle School Association), or research (e.g., American Education Research Association).

There are some distinct similarities between professional associations and labor unions. Both entities may provide legal and liability coverage, as well as a host of incidental benefits (e.g., discounts). Unions and professional associations may monitor relevant legislation and promote regulations that uphold quality standards for the profession (Hurd, 2000). They may both charge fees or dues for membership. However, dues for professional association membership are typically significantly less than union dues (Hurd, 2000; Iowa State Education Association, 2011c; Professional Educators of Iowa, 2014b).

Similarities aside, it is important to provide a distinction between a professional association and a labor union. In the State of Iowa for example, ISEA is classified as a 501(c)(5), which the Internal Revenue Service identifies as a labor organization that is “An association of workers who have combined to protect and promote the interests of the members by bargaining collectively with their employers to secure better working conditions” (Internal Revenue Service, 2012a, para 1). Conversely, PEI is classified as a 501(c)(6), which the IRS classifies as a business league. Business leagues are defined as “an association of persons having some common business interest, the purpose of which is to promote that common interest and not to engage in a regular business of a kind ordinarily carried on for profit” (Internal Revenue Service, 2012b, para 2).

Both unions and professional associations have reported democratic governance structures. However, professional association leadership at the national level often serves without compensation. This is not typical of national level leadership in labor unions, who are often paid in six-figure salaries. The NEA had 437 staffers in 2010 making over

\$100,000 (United States Department of Labor, 2011a). Membership to professional associations is voluntary. However, depending on a state's collective bargaining laws, educators may or may not have a choice in union membership and/or paying fair share dues to the union as a non-member.

Philosophically, professional associations focus their energies on meeting the needs of individuals and providing information, professional development, and networking. Unions typically focus on relationships with the employers, job security, and terms of employment. As such, professional association members join most often for information and camaraderie, while union members are inclined to join more for job security reasons (Hurd, 2000).

### Identity Crisis

There are many similarities between a labor union and a professional association. However, it is as a result of the differences and distinctions that the teachers' union must maneuver. In an attempt to continue involvement with organized labor but also appease onlookers and members who desire a more professional association, the NEA suffers from an identity crisis. "Teacher unions are very much grappling with the challenge of how to perform the functions of a profession while simultaneously embracing unionism" (Hurd, 2000, p. 22). Undeniably, the industrial model of teacher unionism served a useful purpose by improving pay and working conditions at the onset of public education and ending arbitrary and discriminatory practices (Simon & Baden, 2008). But, many are left to wonder if the NEA is a union, an association, or both? The general public may wonder

if modern-day teachers' unions, by holding on to traditional labor tactics, have become obsolete. As Peter Shrag (1998) lamented,

Teacher unionism has always been an uncomfortable fit, producing no end of ambivalence among the rank-and-file... Are they teachers that are just another collection of blue-collar working stiff or are they professionals whose responsibilities transcend the limitations of negotiated hours, working conditions, and seniority rules? If they insist on the prerogatives and status of professionals, can they also behave like assembly line unionists hitting the bricks and trying to shut down the enterprise, even as they claim to have only the 'children's interest at heart?' (as cited in Richards, 2008, p.173)

Rabban (1991) conducted a study about the impact of collective bargaining on professionalism, with findings suggesting that collective bargaining has had a mixed impact on professional values. Hurd (2000) supports this notion of ambivalence by saying,

Today's professional workers' attitudes toward unions are ambivalent. On one hand, professionals stake great pride in their own abilities, intelligence, and accomplishments, and tend to seek gratification individually. On the other hand, professional workers who feel that they are not given the respect that they deserve are self-confident enough to stand up and demand redress... Professional workers struggle with the question of how to reconcile unionism with professionalism. (p.3)

It is this very notion of identity ambivalence that feeds the need to further explore how and if the unions are representing the interests of the NEA members.

#### Contributions to the Body of Research

The existing body of literature is replete with research and tales about the labor movement, the teachers' unions, and more specifically, the NEA. Preliminary review of the research indicates that little formal study examining teacher's attitudes, beliefs, and values related to the NEA's political and legislative activity has been completed and/or made public. This is despite the acknowledgement internally by NEA that a disconnect

may exist between how they are representing teachers and member's wishes. Moe (2011) confirms this notion by stating that despite the "Teachers' unions [having] tremendous influence over the nation's schools, they have been very poorly studied" (p. 18). He goes on to suggest that studies focused on the teachers' unions do not explore the "connection between teachers and their unions" (p. 68).

Successful advocacy for the profession of education is predicated on the notion that the political attitudes, behaviors, and values held by teachers are indeed supported by the collective interests of the teachers' unions. The intention of this research, then, is to offer a contribution to the fundamental knowledge base about the extent to which the NEA political activities represented previous ISEA members' personal attitudes, beliefs, and values. This study bears great relevance because of the political powerhouse that the NEA has become at the national level, in coalition with the ISEA at the state level.

## CHAPTER 3

### RESEARCH DESIGN

The purpose of this study was to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aimed to understand the factors that may have influenced their membership decisions. Lastly, this study further explored the degree to which former ISEA members were aware, involved, and aligned with NEA political activities and how the political activities shaped their membership choices.

To accomplish these goals, a mixed methods study, employing qualitative and quantitative methodology was used. By integrating qualitative and quantitative data, this mixed methods approach allowed for both a large scale collection of statewide data, as well as in-depth understanding about individual experiences that may shape how that data is interpreted.

To obtain a statewide perspective on these issues, pilot survey and survey instruments were utilized. These quantitative tools allow for the explanation of phenomena through use of descriptive research; that is, collection of numerical data that is analyzed using mathematically based methods (Muijs, 2004). Descriptive research allows the researcher to “collect data in order to answer questions about the current status of the subject” (Jacobs, 2011, p.4).

To obtain a more in-depth understanding of PEI member experiences, focus group methodology and narrative feedback on the survey were analyzed. These qualitative tools first allowed for the gathering of data and then to build understandings, concepts, and

potentially, hypotheses. To reach a clearer understanding and develop rich description, this study is phenomenological in nature and focused on a construct that we are aware of, but do not fully understand (Hancock, 2002; Merriam, 2009). As Marshall and Rossman (1980) described, researchers cannot understand human behavior without understanding the context within which participants interpret their thoughts, feelings, and actions. Merriam (2009) concurred, when saying that qualitative research allowed for the understanding of how people interpret their experiences, construct their understandings, and ascribe meaning to their experiences.

This mixed-methods approach taken allowed the opportunity to explore the topic at hand through two different lenses. First, through use of a focus group and surveys, I was able to not only describe the phenomenon, but also depict my understanding of the phenomenon. This *emic* perspective encourages insights into a phenomenon from an insider, or members' perspective (Merriam, 2009).

Conversely, by highlighting my own personal experiences related to the teachers' union in Chapter 1, I have captured the *etic* perspective, that is, the view of the researcher. Smith and Deemer (2000) suggested, "That it is virtually impossible to disentangle the descriptive from the interpretive" (p. 882).

Creswell and Plano-Clark (2007) described mixed methods research in the following manner:



Mixed methods research is a research design with philosophical assumptions as well as methods of inquiry. As a methodology, it involves philosophical assumptions that guide the direction of the collection and analysis of data and the mixture of qualitative and quantitative approaches in many phases in the research process. As a method, it focuses on collecting, analyzing, and mixing both quantitative and qualitative data in a single study or series of studies. Its central premise is that the use of quantitative and qualitative approaches in combination provides a better understanding of research problems than either approach alone. (p. 5)

## Methodology

### Data Collection

Data gathered from current PEI members included a mix of quantitative and qualitative data collection methods. Sources included data gathered from focus groups, a pilot survey, and a survey.

Focus group. Through the focus groups, PEI members' perspectives about their former experiences with ISEA and NEA were gathered. Two focus groups with seven and six participants were conducted. Research indicates that between six and fifteen participants is common and acceptable practice for a focus group (Greenbaum, 1998; Johnson & Christensen, 2004; Krueger, 2000; Merton, Fiske, & Kendall, 1990).

Two focus groups were conducted at a neutral meeting place and both focus groups lasted approximately 90 minutes. An independent moderator led the focus group, while the researcher assisted the moderator and participants, ensuring the audio recording worked correctly and also took anecdotal notes. The moderator chosen had background in education, but had no past or current ties to ISEA/NEA or PEI. The moderator was knowledgeable about the topic at hand and skillful in facilitating a group conversation.

The goal of the focus group moderator was to engage all participants, while at the same time maintain a free flowing conversation that addresses the desired questions.

As suggested by Merriam (2009), during the introduction to the focus group, the following were addressed: (a) a neutral description of the focus group agenda; (b) the motives for the study; (c) the protection of respondents; and (d) final determination of the content use.

A semi-structured interview guide was utilized with a predetermined set of questions that allows for latitude in the introduction of content that furthers the goals of the research (Freebody, 2003). In addition to introductory questions, inquiries were made that tie back to the research questions and focused on: (a) experience and behavior; (b) opinion and values; (c) feelings; (d) knowledge; and (e) background/demographic information (see Appendix F). A line of ad-hoc follow-up questions occurred as a logical extension of statements made by participants to ensure understanding. With permission of the participants, the focus group was audio recorded for transcription and analysis, to aid in the development of survey and interview protocols, and to ensure accuracy of responses. Audio recordings will be destroyed within one year of completion of the research. Additionally, the researcher took field notes immediately following the focus group.

The focus group was not designed to be statistically representative of the entire PEI population. Instead, a non-probability sample was chosen, with criterion-based selection guiding the process for recruitment that identifies the essential attributes for participants (Merriam, 2009). Criterion for selection in the focus group included: (1)

educators within the county the researcher resides, (2) homogenous group, (3) belonged to PEI for at least one year, (4) worked in a district where PEI and ISEA were both represented, (5) potential focus group candidates provided permissions to PEI Executive Director to be contacted, (6) willingness and availability to participate in the focus group, (7) previous ISEA/NEA membership not required. Both criterion one and six are also reflective of convenience sampling (Merriam, 2009). The homogeneity of the focus group did not preclude diversity in beliefs and opinions, but merely allowed for potential similarities in terms of PEI and ISEA/NEA membership and experiences.

A list of 46 potential focus group participants and contact information were provided to the researcher by the PEI Executive Director. After receiving the list of names and contact information for potential focus group participants, recruitment was initiated. Because the researcher was only provided names and contact information, other contextual information was not available, including demographic information, school district information, previous ISEA membership, or length of PEI membership. In two cases, finding a suitable number of participants became problematic, and a snowball sample was used by having existing participants recommend other potential participants (Clayson, 2002; Merriam, 2009). Personal judgment was applied in the selection process (Clayson, 2002).

Potential participants were contacted via phone and then followed up with via email. During the initial contact, a recruitment script will be read to participants (See Appendix C). Two dates for focus groups were established and participants chose which

worked best for them. Prior to conducting the focus group, a hard copy consent form (See Appendix D) and Demographic Information sheet were completed by all participants (See Appendix E).

Additionally, it is important to capture not only perspectives about their lived experiences, but also to gain insight into the vocabulary used among their cohort to describe certain phenomena that may be assumed. Group interviews give “rise synergistically to insights and solutions that would not come about without them... [they] added depth, detail, and meaning at a very personal level of experience” (Patton, 1990, p. 17). Merriam (2009) indicated that focus groups allow participants to hear and respond to each other’s comments and provided the opportunity to consider their own views in the context of the views of others.

Pilot survey instrument. A goal of this study was to gain large scale understanding of perceptions held statewide by PEI members. The first step was to prepare a pilot survey tool. In addition to garnering the participants’ viewpoints, the intent of this pilot survey was to gather data about the deficits and suggestions for improvement of the survey tool (Jacobs, 2011). At the end of the survey, participants shared their suggestions for improvement related to the survey design, ease of navigation, content, formatting, wording, and utility of the survey. The changes were made to reflect a better survey experience for the larger population.

The pilot survey was conducted with 22 participants who were current PEI members. Research indicates that a pilot survey sample should be large enough to provide useful information and that between 12 and 30 participants are acceptable for a

pilot survey (Browne, 1995; Julious, 2005; Thebane, 2010). The participants were recruited from a list of 46 PEI members provided by the PEI Executive Director. Those who had not participated in the focus group were invited first, which resulted in 16 pilot survey participants. In an effort to increase the sample, six additional pilot survey participants were recruited from those who had participated in the focus group.

The questions asked on the pilot survey were derived from the knowledge desired in each of the research questions, but were also influenced by the focus group discussion. Appendix G highlights the survey tool utilized. Appendix I highlights the path that users would take during the survey depending on how they answered question three about previous ISEA/NEA membership.

Types of survey questions centered on target variables, such as member awareness of political activity, as well as their involvement and agreement with said political activity. In addition to introductory questions, the question content also included a focus on: (a) experience and behavior, (b) opinion and values, (c) feelings, (d) knowledge, and (e) background/demographic information. The survey will include the following question formats: (a) rating scales, (b) mark all that apply, and (c) multiple choice. The majority of questions also had comment boxes that participants had the option of leaving additional remarks about the given question.

The pilot survey participants were contacted via phone to determine their interest in completing the survey and followed up with through email. During the initial contact, a recruitment script was read to participants (See Appendix C). Prior to conducting the survey, an electronic consent form was signed (See Appendix D). A link to the online

survey was distributed through email to participants. It is estimated that the survey took participants about 5 to 10 minutes to complete. Participants completed the survey at the time of their choosing within a specified one-week window.

Survey instrument. A goal of this study was to gain large scale understanding of perceptions held statewide by PEI members. Analysis of the pilot survey data and participant feedback further guided development of the survey intended for the entire PEI population.

A link to the online survey was distributed electronically through the PEI organization to all members via PEI regular email communications from the PEI Executive Director. The electronic survey was housed on a secured website for PEI members for a three-week time-period in January 2014. Participants complete the survey at a time of their choosing within that designated time period. One reminder email was sent to all PEI participants through PEI regular communications prior to the close of the survey period. All current PEI members were eligible to participate in the survey, including those who participated in the focus group or pilot survey.

Due to the political nature of this research, a larger sample of survey participants is desired, with research suggesting that a larger sample size has potential to be more persuasive (Clayson, 2002). Research indicated it is reasonable to expect between 20 and 30% response rate (Instructional Assessment Resources, 2012; Kittleson, 1997; Nulty, 2008). For the purposes of this population with 3,065 potential participants, it was expected that between 613 and 920 participants would complete the online survey. In fact, 697 PEI members completed the survey, which is a response rate of 23%.

To increase participation, a randomized drawing for two \$100 Visa gift cards was offered for those who both completed the survey and were willing to give their contact information in a separate and secured survey data base. A separate survey was linked to the end of the primary survey, which collected the contact information for those interested in participating in the drawing in a separate database (See Appendix H). Of the 697 survey respondents, 606 provided their names to participate in the drawing.

The two winners were chosen at random with use of True Random Number Generator. All participants who provided their names were assigned a random number between 386 and 992. The True Random Number Generator chose the two winners who had been assigned the numbers 420 and 793. The two winners were contacted immediately by email and the Visa gift cards were sent to the address provided. Both participants confirmed receipt of the gift cards. The names of the gift card winners were announced in PEI regular communications following confirmation that the two winners had received their gift cards.

As suggested by Gorard (2001), an introduction letter to participants accompanied the survey. This information took the form of a recruitment script and outlined the purpose of the research, the value in conducting the research, the rationale for participant selection, and how the results will be utilized (See Appendix C). Prior to participating in the surveys, all participants completed and agreed to the survey procedures in an online consent form (See Appendix D).

### Data Analysis

Data collected through use of a focus group, a pilot survey, and survey, led to a stronger understanding of PEI member perceptions about ISEA and NEA membership decisions and political activities. This research involved various modes of analysis, to best represent both the quantitative and qualitative data sources represented.

Quantitative data was analyzed using descriptive statistics, through use of the Statistical Package for the Social Sciences (SPSS). Such descriptive statistics included frequencies, percentages, averages, and measures of variability. Specifically, measures of central tendency focused on the density of the data and included analysis of the mean, median, and mode. Additionally, analysis also focused on how data is dispersed, including variance and standard deviation. Specifically, degrees of association were measured using Chi Square. One-Way Analysis of Variance (ANOVA) was used to determine statistical differences between the means.

Qualitative data was analyzed through inductive analysis (Patton, 1990) and the use of the constant comparative method (Lincoln & Guba, 1985). Transcribed data was analyzed for patterns, themes, and categories. Key words and phrases were identified as critical and relevant if they were repeated by the majority of the participants. Common words and phrases were subsequently grouped into conceptual categories. The conceptual categories were further used to identify patterns and themes repeated across the transcripts of the focus groups and the optional comments in the survey. These patterns and themes were then refined based on properties or dimensions that provide insight into the research questions posed (Strauss & Corbin, 1990).



What emerged from the focus groups and survey comments was compared to quantitative data gathered from the surveys, as well as demographic information. Additionally, the data was analyzed against the three theoretical frameworks of Cognitive Dissonance, Cognitive Evaluation Theory, and Normative Social Influence. As Bogden and Biklen (1998) stated, “[Data analysis] involves working with data, organizing them, breaking them into manageable units, synthesizing them, searching for patterns, discovering what is important and what is to be learned, and deciding what you will tell others” (p.175).

For both quantitative and qualitative measures, analyzed demographic data included longevity related to PEI membership, ISEA/NEA membership, as well as roles and experiences in education. Additional analyzed demographic data included those who represented urban and rural districts and various building levels (e.g., elementary, middle school, high school). Lastly, analyzed demographic data also considered gender, race/ethnicity, levels of education, and political orientation and party affiliation. All data collected and reported was de-identified, allowing for complete anonymity of all individuals, communities, and school districts referenced in this study.

#### Institutional Review Board

The protocols from the Institutional Review Board (IRB) at the University of Northern Iowa (2012) guided this study and ensured the collection of informed consents from all participants. No risks to participants resulted from involvement in this research. Prior to conducting research, the following were submitted to IRB for approved use in

this study: recruitment scripts, informed consents, focus group script and questions, as well as survey protocols.

The informed consents provided to participants included a statement that the study involved research, an explanation of the purpose of the research, the expected duration of the participant's participation, a description of the procedures to be followed, and where the procedures were done. Also addressed were foreseeable risks, benefits, confidentiality, the right to refuse or withdraw, and researcher contact information.

Analysis of the collected data will be highlighted in Chapter 4, with the recommendations and conclusions highlighted in Chapter 5.

## CHAPTER 4

### RESULTS

The purpose of this mixed-methods study was to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aimed to understand the factors that may have influenced their membership decisions. Lastly, this study further explored the degree to which former ISEA members were aware, involved, and aligned with NEA political activities and how that political activity may have influenced membership choices. To accomplish the goals of the study, mixed methodology was employed. The collection and analysis of both qualitative and quantitative data were of equal importance to the findings of this research.

#### Findings

Chapter 4 explains the findings within three broad areas that are made up of individual research questions. Research questions 1 and 2 focused on the demographics of study participants, specifically of those who were formerly members of ISEA/NEA and discontinued membership, as well as those that opted not to join ISEA/NEA at all. Data from demographic profile sheets and demographic questions on the survey were examined.

Research questions 3, 4, and 5 centered on factors that influenced membership choices with respect to bypassing ISEA/NEA membership, joining ISEA/NEA, and discontinuing ISEA/NEA. Focus group and survey data was examined to address these questions. Lastly, research questions 6, 7, and 8 focused on the degree to which former

ISEA/NEA members were aware, involved, and aligned with ISEA/NEA political activities, respectively.

Focus group and survey data was examined to address these questions. The findings from the focus groups and survey for each research question will be addressed within the appropriate section, along with the tie to the theoretical foundation. A number of statistical methods were used to analyze the quantitative data. Descriptive statistics were gathered reflecting frequencies and percentages. Degrees of association were measured using Chi Square. One-Way Analysis of Variance (ANOVA) was used to determine the statistical differences between the means. Qualitative data was analyzed utilizing the constant comparative method and inductive analysis.

#### Demographic Profiles of Focus Group Respondents

The demographic profile of focus group respondents is provided in the following narrative. Many of the demographic categories are further broken down into subgroups for a more detailed explanation of study participants. Data is also reflected in demographic tables, which shows a total population profile in a number of demographic categories (See Appendix A). The focus groups were conducted with 11 participants during October 2013.

#### Personal Demographic Data

All focus group participants identified themselves as white and all identified their professional role as a teacher. While one focus group participant was between ages 51 and 60, 10 were between ages 20 and 40. The focus group consisted of seven females (64%) and four males (36%). This is slightly different than the entire PEI population in

which 71% of members are female and 29% are male. When considering previous ISEA/NEA experience, one of the four males previously belonged to ISEA, while three of the seven females belonged.

Of the participants in the focus group, 55% reported holding a bachelor's degree, while 45% reflected they had achieved a master's degree. No one in the focus group population held a specialist or doctoral degree. When considering previous ISEA/NEA experience, of those who had not joined ISEA/NEA previously, four held a bachelor's degree and three held a master's degree. Of those that previously joined ISEA, two held a bachelor's degree and two held a master's degree. Table A1 highlights personal demographic data for all participants in the focus groups (see Appendix A).

#### Longevity in Education and ISEA/NEA

Nine of the 11 focus group participants had been teaching 1-15 years, while two had been teaching between 16-30 years. Seven participants opted not to join ISEA previously, but of the four participants who had previously joined ISEA, all of them belonged to ISEA for five years or less. Table A2 reflects the length of time that focus group participants have been educators, as well as their membership patterns with ISEA/NEA (see Appendix A).

#### Political Data

Three different measures were utilized to ascertain political leanings of the focus group participants- political orientation, political party affiliation, and political engagement. No specific descriptions were provided for the labels of liberal, moderate, conservative and Democrat, Independent, and Republican. Respondents self-determined

which political orientation and political party affiliation they aligned with based on their experience and knowledge. Table A3 reflects the political leanings and political involvement for the focus group population (see Appendix A).

Political orientation. The first measure, political orientation, represents the ideological leanings of participants. Participants could choose from liberal, moderate, conservative or no political ideology. Notably, 64% of the focus group population identified themselves as holding a conservative ideology, while 27% held a moderate view, and only 9% identified themselves as liberal.

When the political orientation was analyzed by gender, no males self-reported as liberal, while one reported moderate, and three conservative. While one female self-identified as liberal, two self-identified as moderate and four conservative. A higher percentage of males leaned conservative at 75%, while a higher percentage of females reported holding more liberal or moderate political viewpoints at 43 percent combined.

Of participants who had not been part of ISEA/NEA previously, one identified as liberal, none as moderate, and six as conservative. Comparatively, of previous ISEA/NEA members, none identified themselves as liberal, three as moderate, and one as conservative. Former ISEA/NEA members were more inclined to be middle of the road with three quarters reporting a moderate ideology, while zero non-members indicated the same. Conversely, non-ISEA/NEA members were more inclined to lean conservatively 86% of the time as compared to 25% for previous ISEA/NEA members.

Political party affiliation. The second measure, political party affiliation, represents the political party the participants reported most likely voting for in a typical

election year. Noteworthy is that 64% of participants in the focus group population identified they voted for candidates from the Republican Party, while 18% voted on an Independent ticket, and 9% typically voted for Democratic candidates. When analyzing the political vote by gender, no males reported voting Democrat, while 25% voted Independent and 75% voted Republican. While fourteen percent of females voted Democrat, 14% voted Independent and 57% voted Republican.

When political party affiliation was analyzed against previous ISEA/NEA experience, no previous ISEA/NEA members reported voting on the Democrat ticket, as compared to one participant who was not previously part of ISEA/NEA and voted Democrat. Previous ISEA members were more inclined to vote Independent than those who had not previously been part of ISEA. A notable difference existed among those voting Republican, with 86% of those who did not belong to ISEA voting Republican, while 25% of previous ISEA members voted Republican. Notably, only one person in the focus group indicated they voted for a non-mainstream party, such as the Libertarian, Constitution, or Green party.

Political engagement. The third measure of political engagement assessed the degree to which focus group participants were active with their political interests. While 54% of the total population indicated they were uninvolved politically, 46% indicated they were moderately involved in politics in general.

When considering previous ISEA/NEA involvement, notable differences emerged with 25% of previous ISEA members reporting moderate involvement in their political party, as compared to 57% of those who did not previously join ISEA/NEA. While, 43%

of non-ISEA/NEA members indicated they were uninvolved politically, 75% of previous ISEA/NEA members reported they were uninvolved politically.

When broken down by party affiliation, no Democrats reported being actively or moderately involved with their political party, while one reported being uninvolved. No Independents reported being active politically. While five Republicans reported being moderately or actively involved in the party, two indicated they were uninvolved.

When the intersection of political orientation and political engagement of participants is analyzed, zero liberals reported being moderately or actively involved with their political party, while one reported being uninvolved. No moderates reported being active with their political party, while three indicated a lack of involvement. While five conservatives reported being moderately involved in their political party, two indicated they were uninvolved.

Also of importance to consider is the intersection of participant's political orientation against their political party voting patterns. Table A4 indicates the cross section of these two important variables in the focus group population (see Appendix A).

#### Building and District Data

A moderate spread existed between three building levels for focus group participants. Five focus group participants reported they were in Pre-K/Pre-K/elementary schools, four were in middle school, and two worked in high schools. Of those that had not previously joined ISEA/NEA, three worked in in Pre-K/elementary, three in middle school, and one in high school. Of former ISEA/NEA members, two worked in Pre-



K/elementary, one in middle school, and one in high school. Lastly, Table A5 showcases a breakdown of participants by district and building information (see Appendix A).

Of importance to consider is political ideology by building level. At the Pre-K/elementary level, one teacher identified themselves as liberal, one as moderate, and three as conservative. At the middle school level, zero teachers identified themselves as liberal, one as moderate, and three as conservative. At the high school level, zero teachers identified themselves as liberal, one as moderate and one as conservative.

Two respondents indicated they were educators in rural districts, while two were in suburban school districts, and seven were in urban districts. While two participants reported working in suburban Pre-K/elementary schools, three were in urban Pre-K/elementary schools, four were in urban middle schools, and two were in rural high schools. Table A6 reflects the breakdown of participants by size of district and level of building (see Appendix A).

#### Focus Group Demographics Summary

In summary, the focus group consisted of 11 educators, all who identified themselves as white. The focus group participants consisted of seven females and four males, largely between ages 20 and 40. With regard to education, six focus group participants had earned their bachelor's degree, while the remaining held a master's degree. The majority had been teaching between one and 15 years and only four belonged to ISEA/NEA previously. Politically, the majority identified themselves as conservative or moderate with one participant identifying herself/himself as liberal. The majority align with the Republican Party, while three identified with the Democrats or Independents.

### Demographic Profiles of Survey Respondents

The demographic profile of survey respondents is provided in the following narrative. Many of the demographic categories are further broken down into subgroups for a more detailed explanation of study participants. The tables in Appendix B provide an additional profile of survey respondents in a number of demographic categories. The survey was conducted in January 2014.

#### Longevity in Education

Of the total survey population, 21% were those who had taught ten years or less, 30% had taught for 11 to 20 years, and 38% had been in the field for 21 year or more. Table B1 highlights survey respondent's longevity in the education field, as well as how long they have been a member of PEI (see Appendix B).

Gender. When considering gender and longevity in education, 35% of males had been in education for 10 years or less, 28% were in education for 11 to 20 years, and 37% were in education for 21 years or more. Thirty percent of females were in education for 10 years or less, 31% for 11 to 20 years, and 38% of females for 21 years or more.

Political party affiliation. When considering longevity in education of the survey population, this data can be broken down by how people voted politically. While 36% of Democrats had been in education 10 years or less, 31% had been in education for 11 to 20 years, and 33% for 21 years or more. Additionally, 24% of Independents had been in education 10 years or less, while 36% had been for 11 to 20 years and 40% had been for 21 years or more. Lastly, 29% of Republicans had been in education 10 years or less,

while 30% had been in education for 11 to 20 years and 41% of had been for 21 years or more.

Political orientation. Longevity data can also be broken down by political orientation. While 46% of liberals had been in education 10 years or less, 32% had been in education for 11 to 20 years and 22% for 21 years or more. Additionally, 31% of moderates had been in education 10 years or less, while 32% had been for 11 to 20 years and 36% had been for 21 years or more. Lastly, 29% of conservatives had been in education 10 years or less, while 29% had been for 11 to 20 years, and 42% of had been in education for 21 years or more.

#### PEI Membership Length

Of the total survey population, 72% of PEI members had been PEI members less than 10 years, while 22% had been members for 11 to 20 years and 6% had been PEI members for 21 years or more. This trend reflects the increase in membership trends with PEI in the last decade.

Gender. When considering gender and longevity within PEI, 69% of males belonged for 10 years or less, 22% for 11 to 20 years, and 9% for 21 years or more. While 73% of females belonged to PEI for 10 years or less, 22% belonged for 11 to 20 years, and 5% of females for 21 years or more.

Political party affiliation. PEI length of membership was also be analyzed by political party affiliation. While 81% of Democrats had been PEI members for less than 10 years, 17% had been members for 11 to 20 years, and 2% had been members 21 years or more. Additionally, 70% of Independents had been PEI members for ten years or less,

while 20% had been members for 11 to 20 years, and 10% had been members 21 years or more. Lastly, 68% of Republicans had been PEI members for ten years or less, while 24% had been members for 11 to 20 years, and 8% of had been members 21 years or more.

Political orientation. When considering PEI length of membership, it is also necessary to explore the political orientation of respondents. While 92% of liberals had been PEI members for less than 10 years, 8% had been members for 11 to 20 years, and zero have been members 21 years or more. Additionally, 74% of moderates had been PEI members for ten years or less, while 20% had been members for 11 to 20 years, and 6% had been members 21 years or more. Lastly, 68% of conservatives had been PEI members for ten years or less, while 25% had been members for 11 to 20 years, and 7% of had been members 21 years or more.

#### Length in ISEA/NEA

Fifty-four percent of survey participants who were previous ISEA/NEA members belonged to ISEA/NEA for five years or less, 36% belonged between six and 15 years, and 10% belonged for 16 years or more. Table B2 reflects the length and involvement with ISEA/NEA of survey participants (see Appendix B).

Gender. When analyzed by gender, 84% of men belonged to ISEA/NEA for 10 years or less, while 74% of females belonged for the same period. Worth mentioning is that 5% males and 2% of females who were previous members of ISEA/NEA, were long-time ISEA/NEA members for 21 years or more before switching to PEI. Of those

belonging for 11 to 20 years, 11% were males and 24% of females belonged to ISEA/NEA.

Political party affiliation. Length of ISEA membership can be further analyzed by political party affiliation. While 69% of Democrats were ISEA/NEA members for 10 years or less, 23% had been members for 11 to 20 years, and 8% were members 21 years or more. Additionally, 72% of Independents were ISEA/NEA members 10 years or less, while 26% were members for 11 to 20 years, and 2% were members 21 years or more. Lastly, 79% of Republicans were ISEA/NEA members for 10 years or less, while 19% had been members for 11 to 20 years, and 2% of had been members 21 years or more.

Political orientation. When analyzed by political orientation, 65% of liberals belonged to ISEA/NEA for 10 years or less, while 35% belonged for 11 to 20 years. While 73% of moderates belonged to ISEA/NEA for 10 years or less, 19% belonged for 11 to 20 years, and 7% for 21 years or more. Lastly, 78% of conservatives belonged for 10 years or less, 20% belonged for 11 to 20 years, and 2% belonged for 21 years or more.

#### Involvement with ISEA/NEA

Activity level of former ISEA/NEA members within the organization is also important to report. Of previous ISEA/NEA members, 61% indicated they were not actively involved with ISEA/NEA, while 31% reported they were an average member in terms of involvement. Only 8% reported being involved at an activist or leadership level. Table B2 reflects the level of involvement of former ISEA/NEA members (See Appendix B).

Gender. When analyzing involvement with ISEA/NEA by gender, 55% of males reported being uninvolved with ISEA/NEA, while 34% considered themselves average members and 11% were in activist or leadership roles. Sixty-four percent of females reported being uninvolved with ISEA/NEA, while 29% considered themselves average members and 7% were in activist or leadership roles.

Political party affiliation. When analyzing ISEA/NEA involvement by political party affiliation, 60% of Democrats reported being uninvolved, while 33% considered themselves average members and 7% were in activist or leadership roles. While 61% of Independents reported they were uninvolved as ISEA/NEA members, 30% considered themselves average members and 9% were activists or in leadership roles. Also, 61% of Republicans were uninvolved with ISEA/NEA as members, while 31% considered themselves average members and 8% were in activist or leadership roles. Participants provided a consistent outlook on the lack of involvement as members with 60% of Democrats being uninvolved and 61% of Independents and Republicans being uninvolved. Independents had a slightly higher propensity to be involved as activists or leaders of ISEA/NEA at 9%, compared to 8% of Republicans and 7% of Democrats.

Political orientation. When considering level of involvement of previous ISEA/NEA members, it is also important to note the political orientation. While 65% of liberals reported being uninvolved as a former ISEA/NEA member, 30% identified themselves as an average member and 4% were activists or leaders. Comparatively, 56% of moderates reported being uninvolved as a former ISEA/NEA member, while 37% identified themselves as an average member and 7% were activists or leaders. While 60%

of conservatives indicated they were uninvolved as former ISEA/NEA members, 30% were average members and 10% identified themselves as activists or leaders. To recapitulate, conservatives had a slightly higher propensity to be involved as activists or leaders of ISEA/NEA at 10%, compared to 7% of moderates and 4% of liberals.

### Personal Demographics

The survey participants were very homogenous in terms of race and ethnicity, in that 99% identify themselves as white and non-Hispanic. PEI does not collect this particular demographic on its membership, so it is difficult know if this is representative of their overall membership. Additionally, 99% of those surveyed represented public school districts, while 1% represented private and parochial schools combined. Table B3 highlights personal demographic data for all survey participants (See Appendix B).

Gender. Seventy-two percent of survey respondents were female and 28% were male. This is indicative of the entire PEI membership in which 71% of members are females. When considering previous ISEA/NEA experience, 29% of those with no previous ISEA/NEA experience were males and 71% females. Similarly, 27% of those who were previous ISEA/NEA members were male and 73% were female.

Education attainment. Of the participants in the study, 44% reported holding a bachelor's degree, while 53% reflected they had achieved a master's degree. Thirteen participants (2%) self-reported they held a specialist or doctoral degree. When considering previous ISEA experience, those who had not joined ISEA previously were more inclined to hold a bachelor's degree at 51%, as compared to 41% of previous ISEA

members. Also worth noting, those who had been part of ISEA previously were more inclined to hold a master's degree at 56%, compared to those who did not previously join ISEA at 47%.

When analyzed by gender, 46% of males hold bachelor's degrees, 51% held master's degrees, and 2% held specialist or doctoral degrees, while 44% of females held bachelor's degrees, 54% held master's degrees, and 2% also held specialist or doctoral degrees.

When considering political party against level of education attained, 45% of Democrats have their bachelor's degree, while 51% have their master's and 4% have their specialist or doctoral degrees. Of Independents, 39% hold a bachelor's degree and 61% hold a master's degree. Of Republicans, 45% hold a bachelor's degree, 53% hold a master's degree, and 2% hold a specialist or doctoral degree.

Political ideology analyzed against level of education reflects similar demographics. While 57% of liberals have their bachelor's degree, 35% have their master's and 8% have a specialist or doctoral degree. Of moderates, 43% hold a bachelor's degree, 56% hold a master's and 1% holds a specialist or doctoral degree. Also 44% of conservatives hold a bachelor's degree, while 54% of conservatives have a master's and 2% have a specialist or doctoral degree.

### Political Data

Three different measures were utilized to ascertain political leanings of survey respondents- political orientation, political party affiliation, and political engagement. No specific descriptions were provided for the labels of liberal, moderate, conservative and



Democrat, Independent, and Republican. Respondents self-determined which political orientation and political party affiliation they aligned with based on their experience and knowledge. Table B4 reflects the political leanings and political involvement for the focus group population (See Appendix B).

Political orientation. The first measure, political orientation, represents the ideological leanings of participants. Participants could choose from liberal, moderate, conservative or no political ideology. While 60% of the entire survey population identified themselves as holding a conservative ideology, 23% held a moderate view, and only 6% identified themselves as liberal.

When the total survey population is analyzed by gender and political orientation, 5% of males identified as liberal, while 19% identified as moderate, 68% identified as conservative and 8% had no political orientation. While 8% of females identified as liberal, 25% identified as moderate, and 56% identified as conservative. A higher percentage of males leaned conservative, while a higher percentage of females report holding a more moderate political viewpoint.

Table B5 analyzes political orientation against previous ISEA/NEA experience (see Appendix B). Of participants who had not been part of ISEA/NEA previously, 6% identified themselves as liberal, 22% as moderate, and 64% as conservative, with 8% having no political orientation. Comparatively, of previous ISEA/NEA members, 6% also identified themselves as liberal, 24% as moderate, and 58% as conservative, with 12% having no political orientation. Conversely, 35% of liberals did not previously belong to

ISEA/NEA, while 65% did belong. Thirty-four percent of moderates did not belong to ISEA/NEA, while 66% did. Lastly, 38% of conservatives did not belong to ISEA/NEA while 62% did belong.

Political party affiliation. The second measure, political party affiliation, represents the political party the participants reported most likely voting for in a typical election year. Noteworthy is that 66% of participants in the entire population identified they voted for candidates from the Republican Party, while 13% voted on an Independent ticket, and 18% typically voted for Democratic candidates. When analyzing the political voted by gender, 12% of males voted Democrat, 15% Independent, and 64% voted Republican. While 19% of females voted Democrat, 13% voted Independent, and 66% Republican.

When political party affiliation is analyzed against previous ISEA/NEA experience, 19% of previous ISEA/NEA members reported voting on the Democrat ticket, as compared to 14% of participants who were not previously part of ISEA/NEA and voted Democrat. While 15% of previous ISEA/NEA members voted Independent, 10% of those who had not previously been part of ISEA/NEA voted Independent. A small difference exists among those voting Republican, with 68% of those who did not belong to ISEA/NEA voting, while 65% of previous ISEA/NEA members voted Republican. Notably, 9% of participants with no ISEA/NEA experience were more inclined to vote for a non-mainstream party such as the Libertarian, Constitution, or Green party, as compared with 1% of previous ISEA/NEA members.

Political engagement. The third measure, political engagement, reflects the degree to which participants were active with their political interests. While 44% of the total survey population indicated they were uninvolved politically, 24% said it was dependent upon the year. Also, 32% of the total population self-reported they were actively or moderately involved with their political interests.

When considering previous ISEA/NEA involvement only slight differences emerged with 33% of previous ISEA/NEA members reporting moderate or active involvement in their political party, as compared to 31% of those who did not previously join ISEA/NEA. While 45% of non-ISEA/NEA members indicated they were uninvolved politically, 44% of previous ISEA/NEA members reported they were uninvolved.

When considering political party affiliation, 39% of Republicans self-reported being more moderately or actively involved, as compared to 24% of Democrat and 18% of Independent counterparts. While 57% of Democrats self-reported being the least involved with their political party affiliation, 52% of Independents and 39% of Republicans said the same. Also, 30% of Independents were more likely to report their involvement was dependent on the election year, while 19% of Democrat and 22% of Republicans indicated it depended on the year.

When considering political orientation of members, 27% of liberals reported being actively or moderately involved with their political party, while 51% reported being uninvolved. While 23% of moderates reported being active with their political party, 51% indicated a lack of involvement. Also, 40% of Republicans reported being moderately or actively involved in a political party, while 37% indicated they were

uninvolved. Moderates were more likely to report their involvement was dependent on the election year at 26%, while liberals and conservatives indicated it depended 22% and 23% of the time, respectively.

Political orientation and political party affiliation. Also of importance to consider is the intersection of participant's political orientation against their political party voting patterns. Several observations are worth mentioning. While 91% of those identified as liberal typically voted for Democrats, 89% who identified as conservative typically voted for Republicans. Moderates have a different voting pattern, with 34% voting Democrat, 23% voting Independent, and 42% voting Republican. Of those who did not identify with a political ideology, 34% reported voting Democrat, while 39% voted Independent, 18% voted Republican, and 10% voted for another party. Table B6 indicates the cross section of these two important variables in the participant population (see Appendix B).

Conversely, of those who typically voted Democrat, 31% reported holding a liberal ideology, 44% held a moderate ideology, 4% held a conservative ideology, and 21% did not express a political leaning. Of Independents, 1% held a liberal ideology, 39% held a moderate ideology, 29% held a conservative ideology, 31% did not express a political leaning. Less than 1% of those who voted Republican reported a liberal ideology, while 14% held a moderate ideology, 83% held a conservative ideology, and 3% did not express a political leaning.

### Building Data

Lastly, a moderate spread existed between three building levels, with participants reporting that 41% were in pre-K/elementary schools, 25% were in middle schools and

34% worked in high schools. When considering previous ISEA experience, a higher percentage of previous ISEA/NEA members were middle school teachers at 27%, compared to 21% of non-ISEA/NEA members. Conversely, a higher percentage of those with no previous ISEA/NEA membership were high school teachers at 40%, compared to 32% of previous ISEA/NEA members. Table B7 showcases a breakdown of participants by building information (see Appendix B).

Gender. When analyzed by gender, 17% of males were in pre-K/elementary buildings, as compared to 28% in middle schools and 55% in high schools. Conversely, 50% of females were in Pre-K-Pre-K/elementary buildings, as compared to 24% in middle schools and 26% in high schools.

Political orientation. Of importance to consider is political orientation by building level. At the pre-K/elementary level, 6% of teachers identified themselves as liberal, 24% as moderate, 58% as conservative and 13% held no political leanings. At the middle school level, 1% of teachers identified themselves as liberal, 23% as moderate, and 62% as conservative, while 16% held no political leanings. At the high school level, 9% of teachers identified themselves as liberal, 23% as moderate and 61% as conservative, while 7% held no political leanings.

Conversely, when broken down by political ideology first, a stark contrast among liberals emerged. While 40% of liberals were in pre-K/elementary buildings, 6% were in middle school, and 54% were at high schools. Also, 42% of moderates were in pre-K/elementary buildings, while 24% were in middle schools and 34% in high schools.

While 39% of conservatives reported being in a pre-K/elementary building, 26% were in middle schools and 35% were in high schools.

Political party affiliation. When political party affiliation is analyzed against the level of school building survey participants worked in, 44% of Democrats were in Pre-K/elementary buildings, while 18% are in middle schools and 38% were in high schools. While 48% of Independents are in Pre-K/elementary buildings, 19% were in middle schools and 33% were in high schools. Also, 40% of Republicans were in pre-K/elementary buildings and 32% were in high schools, but also had the highest percentage of any political affiliation in the middle school at 25%.

Conversely, analyzing building data indicated that 18% of Pre-K/elementary teachers in this survey voted Democrat, 16% voted Independent, 64% voted Republican, and 2% voted for another political party. While 12% of middle school participants voted Democrat, 10% voted Independent, 73% voted Republican. Lastly, 19% of high school participants voted Democrat, 13% voted Independent, 64% voted Republican, and 5% voted for another political party.

#### District Data

Notably, 59% of respondents indicated they were educators in rural districts, while 25% self-reported affiliation with suburban school districts, and 15% with urban districts. When considering previous ISEA/NEA experience, of former members, 61% worked in rural district, 26% worked in suburban districts, and 13% worked in urban districts. Conversely, of those educators who did not previously join ISEA/NEA, 56%

worked in rural district, 24% worked in suburban districts, and 20% worked in urban districts. Table B7 showcases a breakdown of participants by district information (see Appendix B).

When analyzed by gender, 58% of males were in rural schools, while 24% were in suburban schools and 18% in urban schools. Similarly, 59% of females were in rural schools, while 27% were in suburban schools and 14% were in urban schools.

When analyzed by political party vote, 64% of Democrats were in rural schools, 24% were in suburban schools, and 12% were in urban schools. While 58% of those who identified as Independents were in rural schools, 29% were in suburban schools, and 13% were in urban schools. Also, 58% of those who identified as Republicans were in rural schools, 26% were in suburban schools, and 16% were in urban schools.

Also of importance to consider is political ideology by district size. Liberals were more prevalent in rural settings, with 64%, as compared to 22% in suburban schools, and 14% in urban schools. While 57% of moderates were in rural schools, 29% were in suburban and 14% in urban schools. Also, 58% of conservatives were in rural schools, while 25% were in suburban settings, and 17% were in urban schools. This data reflected a higher percentage of PEI members coming from rural schools.

#### Survey Demographics Summary

In summary, the survey consisted of 697 educators, all who identified themselves as white. The survey respondents consisted of 72% females and 28% males. With regard to education, 44% of respondents had earned their bachelor's degree, while 53% held a master's degree and 2% attained a specialist or doctoral degree. Length as an educator

represented a balanced dispersion, from those who ranged one year in education to those who were educators for 30 plus years. The majority of survey respondents had also been PEI members for fifteen years or less, while about a quarter had been long-time PEI members. Additionally, two thirds of the survey respondents had belonged to ISEA/NEA previously. Politically, nearly two-thirds of survey respondents identified themselves as conservative, while one quarter indicated they were moderate and the remaining did not identify their political orientation. The majority of survey respondents aligned with the Republican Party, while just over a quarter of respondents aligned with the Democrats or Independents.

#### Factors for Membership Decisions

The following three sections reflect data gathered regarding bypassing ISEA/NEA membership, joining ISEA/NEA, and discontinuing ISEA/NEA. Within each section, an overview of the top five factors influencing the respective membership choices will be presented. This will be followed by more in-depth analysis of the findings, which reflects both quantitative and qualitative data collected. The purpose in sharing the qualitative data is not to reflect the positive or negative perspective of a particular issue studied, but rather is intended to corroborate the findings of the quantitative data and is intended to further explain and personalize the experiences educators had related to ISEA/NEA.

#### Bypassing ISEA/NEA Membership

Research question three sought to address the factors that played into the decisions of PEI members to bypass ISEA/NEA membership altogether. The top five factors for bypassing ISEA/NEA membership will be briefly explored. This will be



followed up by a more in-depth analysis of the factors, which will reflect the findings from both quantitative and qualitative data gathered. The quantitative data reflects the findings from the survey utilized in this study. The qualitative data incorporates the use of quotes derived from both the focus group participants and the narrative provided by respondents in the survey comment boxes.

#### All Factors for Bypassing ISEA/NEA Membership

Survey respondents were asked to identify all of the factors that led to them bypassing ISEA/NEA membership. Respondents could choose as many factors as applicable to bypassing ISEA/NEA membership of 14 options. Table 5 reflects the reasons PEI members did not join ISEA/NEA at all.

#### Overview of the Top 5 Factors for Bypassing ISEA/NEA Membership

First, 82% of respondents indicated cost of membership dues was the primary reason for discontinuing membership. Second, the political activities of ISEA/NEA ranked as the next key factor for bypassing ISEA/NEA membership for 71% of respondents. The third factor for bypassing ISEA/NEA membership, with 70% expressing this, was how membership dues were allocated by ISEA/NEA. The fourth factor related to desiring an alternative association, which reflected that 55% of former members desired a choice with whom they professionally associate. Lastly, ISEA/NEA's non-education platform was the fifth primary factor for bypassing ISEA/NEA membership, indicated by 38% of those who bypassed ISEA/NEA. Statistically significant relationships will be reported within each factor. The following section will

break down the top 5 factors, as well as provide insight into statistically significant relationships which emerged among the factors.

Table 5

*Factors for Bypassing ISEA/NEA Membership*

Reasons for Bypassing ISEA/NEA Membership		N	Percent
		(N = 237)	
1	Cost of dues too high	194	81.9
2	ISEA/NEA political activity	169	71.3
3	Allocation of dues	166	70.0
4	Alternative organization preferred	131	55.3
5	Focus on non-education related issues	91	38.4
6	Connotation of ISEA/NEA as union	90	38.0
7	Pressure to join	88	37.1
8	Traditional union tactics	76	32.1
9	ISEA/NEA supports poor teachers	62	26.2
10	ISEA/NEA supports status quo	57	24.1
11	ISEA/NEA disconnect from local needs	53	22.4
12	Adversarial relationships promoted	41	17.3
13	Simply not interested in being a member	39	16.5
14	Lack of professional resources	5	2.1

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respondents. The third factor for bypassing ISEA/NEA membership, with 70% expressing this, was how membership dues were allocated by ISEA/NEA. The fourth factor related to desiring an alternative association, which reflected that 55% of former members desired a choice with whom they professionally associate. Lastly, ISEA/NEA's non-education platform was the fifth primary factor for bypassing ISEA/NEA membership, indicated by 38% of those who bypassed ISEA/NEA. Statistically significant relationships will be reported within each factor. The following section will break down the top 5 factors, as well as provide insight into statistically significant relationships which emerged among the factors.

#### Cost of Membership Dues

Cost of membership dues was the most prominent factor for 82% of those who opted not to join ISEA/NEA. Table 6 reflects both the number of those who identified cost of membership dues as a factor for bypassing ISEA/NEA, as well as those who did not. Cost of membership dues created statistically significant differences related to political orientation, political party affiliation, length in education, building level, and level of education attained.

Political orientation. When analyzed against political orientation, 94% of moderates indicated cost as the primary factor for not joining ISEA/NEA, while 92% of liberals and 77% of conservatives indicated the cost of dues was a primary factor for bypassing ISEA/NEA membership ( $\chi^2 = 9.59$ ,  $df = 3$ ,  $p = .022$ ).

Table 6

*Cost of Membership Dues as a Factor for Bypassing Membership*

Number 1 Factor for Bypassing ISEA/NEA Cost of Membership Dues	(N=237)	Percent
Yes, high dues was a factor for bypassing membership	194	81.9
No, high dues was not a factor	43	18.1

Political party affiliation. While 93% of Democrats indicated cost of membership dues as a factor for not joining, 90% of Independents concurred. Comparatively, 77% of Republicans cited cost of dues as a factor for not joining ISEA/NEA ( $\chi^2 = 25.68$ ,  $df = 4$ ,  $p < .000$ ).

Longevity in education. While 82% of those teaching 10 years or less cited cost as a factor for not joining, 83% of those teaching 11 to 20 years, and 81% of those teaching 21 years or more indicated the same ( $\chi^2 = 28.95$   $df = 3$ ,  $p < .000$ ).

Building level. The building level where people taught had a strong relationship related to cost of membership. While 86% of high school teachers said cost was a factor, 82% of middle school teachers and 80% of pre-K/elementary teachers cited cost as a factor for not joining ISEA/NEA ( $\chi^2 = 27.55$ ,  $df = 3$ ,  $p < .000$ ).

Attained education. Lastly, 100% of those with specialist or doctoral degrees cited cost as a factor to not joining ISEA/NEA. Comparatively, 85% of those with master's

degrees and 80% of those with bachelor's degrees indicated cost was a factor for not joining ISEA/NEA ( $\chi^2 = 34.35$ ,  $df = 3$ ,  $p < .000$ ).

As shared by an educator who opted not to join, "Cost was the big issue for me. I looked into NEA and it is very expensive. When I first became a teacher, I financially could not afford it." But for others, cost was the initial primary factor preventing them from joining, only later to have this choice reaffirmed by concern of other ISEA/NEA activity. One teacher said, "A co-worker had mentioned the union and the cost comparison so that's why I originally [did not join ISEA/NEA]. I found out other things about the union after the fact that has kept me from ever changing organizations."

Another teacher said,

At first I didn't join because of cost. But then in my first year, I saw how it was completely ineffective in protecting its membership in a poorly negotiated clause in the contract. The union's action actually cost me \$250 in salary for my second year of teaching and in 1980 that was a lot of money. That was more than a month's rent. Never considered union membership after that.

#### ISEA/NEA Political Alignment

ISEA/NEA political activity was the number two factor that influenced would-be members to bypass ISEA/NEA membership, with 71% citing this as a concern. In the case of ISEA/NEA political activities, many former members did not align with or support the ISEA/NEA political activities. This lack of alignment between the political activities was cited as a key reason for bypassing ISEA/NEA membership. Table 7 highlights the differences among those who indicated ISEA/NEA political alignment as a concern and those that did not. ISEA/NEA political activities created a statistically

significant difference among longevity in education, building level, level of education attained, political orientation, political orientation, and political party affiliation.

Table 7

*ISEA/NEA Political Activities as a Factor for Bypassing Membership*

Number 2 Factor for Bypassing ISEA/NEA Political Activity of ISEA/NEA	(N=237)	Percent
Yes, political activity was a factor for bypassing membership	169	71.3
No, political activity was not a factor	68	28.7

Longevity in education. While 88% of educators teaching 11 to 20 years indicated ISEA/NEA politics was a factor in not joining, 81% of veteran teachers teaching 21 years or more agreed. Comparatively, 61% of educators teaching ten years or less cited ISEA/NEA political activity as a factor ( $\chi^2 = 45.27$ ,  $df = 3$ ,  $p < .000$ ).

Building level. Additionally, middle school educators were more inclined than their counterparts to cite ISEA/NEA politics as a reason not to join ISEA/NEA. While 85% of middle school educators indicated this as a factor, 74% of high school and 65% of Pre-K/elementary educators concurred ( $\chi^2 = 26.15$ ,  $df = 3$ ,  $p < .000$ ).

Attained education. Level of education also reflected statistical significance related to ISEA/NEA political activity. While 78% of those with master's degrees indicated politics was a factor in not joining ISEA/NEA, 69% of those with bachelor's degrees, and 50% of those with specialist or doctoral degrees agreed ( $\chi^2 = 30.47$ ,  $df = 3$ ,  $p < .000$ ).

Political orientation. It is no surprise that when analyzed by political orientation and political party affiliation, a statistically significant relationship emerged. While 86% of conservatives cited ISEA/NEA political activity as a primary reason to not join ISEA/NEA, 59% of moderates agreed. Notably, only 8% of liberals cited ISEA/NEA politics as a factor in bypassing ISEA/NEA membership ( $\chi^2 = 47.76$ ,  $df = 3$ ,  $p < .000$ ).

Political party affiliation. Similarly, 83% of Republicans and 75% of Independents cited ISEA/NEA political activity as a primary reason not to join ISEA/NEA. Comparatively, only 17% of Democrats cited ISEA/NEA political activity as a factor bypassing membership ( $\chi^2 = 79.03$ ,  $df = 4$ ,  $p < .000$ ).

Degree to which political activity influenced bypassing membership. Table 8 highlights the level of influence ISEA/NEA political activity had on potential members bypassing ISEA/NEA, as well as a break down by political orientation and political party affiliation.

Table 8

*Degree to Which Political Activity Influenced Bypassing Membership*

Degree of Influence		No/Little		Mod/High	
Political Party Affiliation		(N)	Percent	(N)	Percent
Democrat	(N= 7)	2	28.6	5	71.4
Independent	(N = 15)	1	6.7	14	93.3
Republican	(N = 122)	3	2.5	119	97.5
Other	(N = 17)	0	0.0	17	100.0

Degree of Influence		No/Little		Mod/High	
Political Orientation		(N)	Percent	(N)	Percent
Liberal	(N = 1)	1	100.0	0	0
Moderate	(N = 28)	3	10.7	25	89.3
Conservative	(N = 120)	1	0.8	119	99.2
None	(N = 11)	1	9.1	10	90.9

*Note.* No/Little represents “No or little influence that ISEA/NEA political activity had on bypassing ISEA/NEA membership.” Mod/High represents “Moderate or high degree of influence that ISEA/NEA political activity had on bypassing ISEA/NEA membership.”

*Note.* The sample size for the “No or little influence” was so small that further statistical analysis was not conducted.

ISEA/NEA Political Activity That Concerned Educators

There were six specific areas of concern related to ISEA/NEA political activity that influenced would-be members to bypass ISEA/NEA. Of the 169 would-be members that indicated political activity as a primary factor for not joining ISEA/NEA, the findings can be found in Table 9. Additionally, demographic subgroups that reflected a statistically significant relationship are identified. A breakdown of trends within each area of political activity for all respondents who did not join ISEA/NEA follows.



Table 9

*ISEA/NEA Political Activity Related to Bypassing Membership*

	(N = 169)	Percent
<b>Political Activities Related to Bypassing ISEA Membership</b>		
Use of membership dues toward politics	157	92.9
Social issues supported by ISEA/NEA	119	70.4
ISEA/NEA political candidate endorsements	116	68.6
ISEA/NEA political party affiliation	120	71.0
ISEA/NEA resolutions/platform	75	44.4
ISEA/NEA organizational affiliations	83	49.1

The following analysis reflects the responses from all who bypassed ISEA/NEA membership, whether they cited politics as a primary factor for discontinuing or not. All respondents identified the ISEA/NEA political activities of most concern to them.

Use of membership dues toward politics. The primary political factor that influenced bypassing ISEA/NEA membership related to the perception of membership dues being used for political purposes. Use of membership dues for political purposes created a statistically significant difference related to longevity in education, building level, attained education, political orientation, and political party affiliation.

*Longevity in education.* While 91% of veteran teachers with 21 years or more teaching indicated how dues were allocated politically was a concern, 81% of those teaching 11 to 20 years and 64% of those teaching ten years or less agreed ( $\chi^2 = 45.18$ ,  $df = 3$ ,  $p < .000$ ).

*Building level.* While 86% of middle school educators cited dues used for political purposes as a concern, 78% of high school educators and 63% of pre-K/elementary educators also cited this as a concern ( $\chi^2 = 32.04$ ,  $df = 3$ ,  $p < .000$ ).

*Attained education.* Lastly, 81% of those with master's degrees and 69% of those with bachelor's degrees cited use of dues toward political activities as a concern. Twenty-five percent of those with specialist or doctoral degrees concurred ( $\chi^2 = 33.06$ ,  $df = 3$ ,  $p < .000$ ).

*Political orientation.* Politically, 85% of conservatives cited the allocation of dues toward political activities as a concern, while 63% of moderates and 15% of liberals concurred ( $\chi^2 = 37.28$ ,  $df = 3$ ,  $p < .000$ ).

*Political party alignment.* In terms of party affiliation, 80% of Republicans and Independents cited dues allocation for political purposes as a significant factor, while only 33% of Democrats agreed ( $\chi^2 = 59.91$ ,  $df = 4$ ,  $p < .000$ ).

Many respondents shared additional thoughts on political activity supported by membership dues. One teacher said, "I guess I don't consider myself a Republican or Democrat. [Either way], I don't feel right knowing that my dues are going to support a specific political party that I may or may not agree with their stance on things. I think the

dues could be cheaper if they didn't give money to these political [activities]." One teacher who opted not to join ISEA/NEA simply said, "[ISEA/NEA] spends way too much money on politics."

Moreover, it was not just concern about dues being spent politically, but that local union leaders could not or did not articulate where they money was going. One teacher said, "They would say things like, 'It goes to ISEA and NEA', but they weren't educated to give me an answer like that. I found out on my own. No one [from the union] is ever able to specify where the money goes." Another teacher said, "When I started asking questions [about where money goes], I really got the door slammed in my face." Another teacher said, "As I recall, they would say something like 'x percent stays here, x percent goes to the [ISEA], and x percent goes to the [NEA]. I don't remember what those figures were, but the vast majority went to the NEA and another big piece went to the ISEA. And then [the locals] get the crumbs and I don't know what they do with that. So the question I have for the two big chunks is what are they using this money for?"

ISEA/NEA political candidate endorsements. The second concern among political activities for those who bypassed ISEA/NEA membership related to the political candidate endorsements made by ISEA/NEA. Candidate endorsements created a statistically significant difference related to longevity in education, building level, attained education, political orientation, and political party affiliation.

*Longevity in education.* While 62% of veteran teachers with 21 years or more teaching indicated political candidate endorsements were a concern, 59% of those teaching 11 to 20 years and 47% of those teaching ten years or less agreed ( $\chi^2 = 18.44$ ,  $df = 3$ ,  $p < .000$ ).

*Building level.* Also, 64% of middle school educators cited political candidate endorsements a concern, while 58% of high school educators and 43% of pre-K/elementary educators saw this as a concern ( $\chi^2 = 15.28$ ,  $df = 3$ ,  $p = .002$ ).

*Attained education.* Lastly, 56% of those with master's degrees cited political candidate endorsements to be a concern, while 52% of those with bachelor's degrees and 25% of those with specialist or doctoral degrees concurred ( $\chi^2 = 10.69$ ,  $df = 3$ ,  $p = .014$ ).

*Political orientation.* Politically, 66% of conservatives cited political candidate endorsements as a concern, while 35% of moderates and 15% of liberals concurred that political candidate endorsements were indeed a concern ( $\chi^2 = 26.71$ ,  $df = 3$ ,  $p < .000$ ).

*Political party affiliation.* Also, 60% of Republicans and 55% of Independents cited political candidate endorsements as a significant factor. Only 20% of Democrats indicated concern for political candidate endorsements by ISEA/NEA ( $\chi^2 = 29.80$ ,  $df = 4$ ,  $p < .000$ ).

One teacher cited that he did not join ISEA/NEA because, “[ISEA/NEA] supported political candidates that didn’t match my views.” Another teacher who was put off by political candidate endorsements said, “I figure I can express my own opinion. I don’t want any organization professing to speak for me or professing to know what I

want or what is best for me, any more than I want to be labeled or grouped as female or native Iowan or middle –aged or any other characteristics.”

Social issues supported by ISEA/NEA. The third concern among political activities for those who bypassed ISEA/NEA membership related to the social issues supported by ISEA/NEA. Social issues may directly or indirectly relate to education. A few examples of the many social issues in which ISEA/NEA takes a stance on includes health care, climate change, immigration, and family planning. Concern of social issues created a statistically significant difference related to longevity in education, building level, attained education, political orientation, and political party affiliation.

*Longevity in education.* While 74% of veteran teachers indicated social issues promoted by ISEA/NEA were a concern, 58% of those teaching 11 to 20 years and 45% of those teaching ten years or less agreed ( $\chi^2 = 23.05$ ,  $df = 3$ ,  $p < .000$ ).

*Building level.* Also, 66% of middle school educators cited social issues promoted by ISEA/NEA as a concern, while 54% of high school educators and 47% of pre-K/elementary educators saw this as a concern ( $\chi^2 = 11.86$ ,  $df = 3$ ,  $p = .008$ ).

*Attained education.* Lastly, 62% of those with master’s degrees cited social issues to be a concern, while 48% of those with bachelor’s degrees and 25% of those with specialist or doctoral degrees concurred ( $\chi^2 = 14.81$ ,  $df = 3$ ,  $p = .002$ ).

*Political orientation.* Politically, 70% of conservatives cited the social issues ISEA/NEA promotes as a concern, while 28% of moderates and zero liberals concurred ( $\chi^2 = 46.39$ ,  $df = 3$ ,  $p < .000$ ).

*Political party affiliation.* Lastly, 65% of Republicans and 40% of Independents cited social issues as a significant concern, while only 10% of Democrats agree ( $\chi^2 = 43.23$ ,  $df = 4$ ,  $p < .000$ ).

Again, would-be members shared additional comments about the social agenda of the ISEA/NEA. One teacher who opted not to join ISEA/NEA simply said, “I do not agree with the many social agendas promoted by the ISEA/NEA.” Yet another said, “ISEA and NEA are involved in too many issues that have no real relevance to education. As a Christian, I will not support something that is oppositional to my values and beliefs.” One more said, “My values and voting do not align with ISEA/NEA,” while another reiterated, “I don’t want to support the liberal [social] agenda.”

ISEA/NEA political party affiliation. The fourth political activity of ISEA/NEA of concern to some would-be members related ISEA/NEA’s tie to the Democratic Party. Political party affiliation created a statistically significant difference related to gender, longevity in education, building level, attained education, political orientation, and political party affiliation.

*Gender.* A significance among gender occurred with 71% of males citing political party affiliation as a concern, while 50% of females cited that same concern ( $\chi^2 = 8.573$ ,  $df = 1$ ,  $p = .003$ ).

*Longevity in education.* While 71% percent of veteran teachers indicated political party affiliation was a concern, 58% of those teaching 11 to 20 years and 49% of those teaching ten years or less agreed ( $\chi^2 = 19.60$ ,  $df = 3$ ,  $p < .000$ ).

*Building level.* Also, 66% of middle school educators cited political party affiliation as a concern, while 55% of high school educators and 51% of pre-K/elementary educators cited political party affiliation as a concern ( $\chi^2 = 11.58$ ,  $df = 3$ ,  $p = .009$ ).

*Attained education.* Lastly, 63% of those with master's degrees cited political party affiliation to be a concern, while 49% of those with bachelor's degrees and 50% of those with specialist or doctoral degrees concurred ( $\chi^2 = 12.21$ ,  $df = 3$ ,  $p = .007$ ).

*Political orientation.* Politically, 70% of conservatives cited political party affiliation as a concern related to ISEA/NEA political activity, while 39% of moderates and 8% of liberals concurred ( $\chi^2 = 36.73$ ,  $df = 3$ ,  $p < .000$ ).

*Political party affiliation.* Both 65% of both Republicans and Independents cited party affiliation as a significant factor. Notably, only 10% of Democrats expressed concern about ISEA/NEA's political party affiliation ( $\chi^2 = 46.31$ ,  $df = 4$ ,  $p < .000$ ).

One teacher recalled about, "My dad was a member of NEA in the 1970s and I remember my parent's frustration with the amount of one-side political advertising in the national newsletter. It has gotten worse since then." Another said, "NEA politically didn't match what I would give money to, candidates or organizations."

*ISEA/NEA organizational affiliations.* The concern of organizational affiliations is centered on the partnerships, associations, and collaboration with and among many organizations that appear to have a particular political bent. The ISEA/NEA organizational affiliations created statistically significant differences related to longevity

in education, building level, attained education, political orientation, and political party affiliation.

*Longevity in education.* While 57% of veteran teachers indicated ISEA/NEA organizational affiliations were a concern, 36% of those teaching 11 to 20 years and 32% of those teaching ten years or less agreed ( $\chi^2 = 14.81$ ,  $df = 3$ ,  $p = .002$ ).

*Building level.* Also, 43% of high school teachers and 41% of middle school teachers cited ISEA/NEA organizational affiliations a concern, while 33% of pre-K/elementary teachers identified this as a concern ( $\chi^2 = 9.58$ ,  $df = 3$ ,  $p = .023$ ).

*Attained education.* Lastly, with regard to the level of education attained, 43% of those with master's degrees cited ISEA/NEA organizational affiliations to be a concern, while 35% of those with bachelor's degrees and 25% of those with specialist or doctoral degrees concurred ( $\chi^2 = 9.98$ ,  $df = 3$ ,  $p = .019$ ).

*Political orientation.* Politically, 50% of conservatives cited ISEA/NEA organizational affiliations as a concern, while 26% of moderates and 8% of liberals concurred ( $\chi^2 = 23.97$ ,  $df = 3$ ,  $p < .000$ ).

*Political party affiliation.* Lastly, 45% of Republicans and 30% of Independents cited ISEA/NEA organizational affiliations as a significant factor, while only 7% of Democrats indicated ISEA/NEA organizational affiliations were a concern to them ( $\chi^2 = 22.91$ ,  $df = 4$ ,  $p < .000$ ).

Respondent's anecdotal stories conveyed concerns of the ISEA/NEA organizational affiliations. As one teacher who opted not to join ISEA/NEA said, "I don't



like any of the organizations that the NEA chooses to support with money they have no business spending.” Another said, “If I strongly believe in one of these organizations, I would give my own money to them. I wouldn’t expect my professional organization to give them money for me. That is not their place.” Another teacher said, “It’s deceptive. You think you are giving your money to education and to advance your student’s education. It is going to things that look to advance the Democratic Party. It is just deceptive to a lot of people who are members.” Lastly one described ISEA/NEA like this by saying, “They are a rogue organization that people think [does] one thing for education, but does other things.”

ISEA/NEA resolutions/platform. Tied closely to social issues are the resolutions and platform stances held by ISEA/NEA. Some of these may indeed be related to social issues, while others may be tied to politics, labor unions, or public education. ISEA/NEA resolutions and platforms created a statistically significant difference related to gender, longevity in education, political orientation, and political party affiliation.

*Gender.* A significance among gender occurred as 48% of males cited resolutions and platform as a concern, while 27% of females cited that same concern ( $\chi^2 = 8.77$ ,  $df = 1$ ,  $p = .003$ ).

*Longevity in education.* While 43% of veteran teachers indicated resolutions and platform were a concern, 34% of those teaching 11 to 20 years and 28% of those teaching ten years or less agreed ( $\chi^2 = 9.34$ ,  $df = 3$ ,  $p = .025$ ).

*Political orientation.* Politically, 39% of conservatives cited resolutions and platform as a concern, while 30% of moderates and zero liberals concurred ( $\chi^2 = 12.58$  df = 3,  $p = .006$ ).

*Political party affiliation.* Lastly, 40% of Independents and 37% of Republicans cited resolutions and platform as a significant concern. Conversely, only 3% of Democrats expressed concern about the ISEA/NEA resolutions and platform issues ( $\chi^2 = 20.21$ , df = 4,  $p < .000$ ).

#### Allocation of Membership Dues

The third factor influencing educator's decisions not to join ISEA/NEA related to how membership dues were allocated. Notably, 70% of respondents indicated how dues were allocated was a primary factor for not joining ISEA/NEA. Table 10 reflects both the number of would-be members who indicated allocation of membership dues was a factor in bypassing ISEA/NEA, as well as those who did not. Allocation of membership dues created statistically significant relationships related to longevity in education, building level, political orientation, and political party affiliation.

Longevity in education. While 84% of those teaching 11 to 20 years reported allocation of dues as a factor in not joining ISEA/NEA, 79% of those teaching 21 years or more concurred. Comparatively, 60% of those teaching ten years or less cited allocation of dues as a factor in not joining ISEA/NEA ( $\chi^2 = 32.44$ , df = 3,  $p < .000$ ).

Table 10

*Allocation of Membership Dues as a Factor for Bypassing Membership*

Number 3 Factor for Bypassing ISEA/NEA Allocation of Dues	(N=237)	Percent
Yes, allocation of dues was a factor for bypassing membership	166	70.0
No, allocation of dues was not a factor	71	30.0

Building level. Eighty-one percent of middle school educators cited allocation of dues as a factor for not joining. Comparatively, 75% of high school educators and 61% of those in Pre-K/elementary buildings cited allocation of dues as a factor for bypassing ISEA/NEA membership ( $\chi^2 = 18.73$ ,  $df = 3$ ,  $p < .000$ ).

Political orientation. Additionally, 81% of conservatives cited allocation of membership dues as a factor for not joining ISEA/NEA. Comparatively, 61% of moderates and 46% of liberals cited allocation of dues as a factor for bypassing membership ( $\chi^2 = 21.02$ ,  $df = 3$ ,  $p < .000$ ).

Political party affiliation. While 88% of Independents cited allocation of membership dues as a factor for not joining, 78% of Republicans agreed. Notably, 40% of Democrats concurred ( $\chi^2 = 42.63$ ,  $df = 4$ ,  $p < .000$ ).

Reassignment of dues. Of the 166 survey respondents who selected dues allocation as a factor in not joining ISEA/NEA, many had strong opinions about how their dues should be spent had they become a member. Table 11 highlights how they believed dues should and should not be spent, followed by more detail about each of the

six areas. Of specific interest to this study, national level issues and politics were the last on the list for reassignment of dues.

Would-be members shared sentiments that further validated the concerns related to cost and allocation of the dues. One educator posed the idea of having the opposite pay structure for local, state, and national unions. For example, “If at the top of the pyramid, the smallest amount of money goes to the local, I’d be curious to see what happens if we flip that around and have the highest percentage of dues to local schools and local representatives.” Another said of more money staying local, “You would have more buy-in with teachers if they knew a large percentage of money went into their own school district. It would help support people who are helping with negotiations or whatever.”

Table 11

*How ISEA/NEA Dues Should be Allocated*

How Dues Should Be Allocated	Non- ISEA (N = 166)	Percent
Local level issues	126	76.0
State level issues	111	67.0
Professional development	100	60.0
Students/Families	66	40.0
National level issues	45	27.0
Politics	16	10.0

### An Alternative Association

The fourth factor in educator's choice to bypass ISEA/NEA related to the desire to have an alternative professional association with which to belong. Of educators opting not to join ISEA/NEA, 55% of those previously indicated they desired an alternative professional association. Table 12 reflects the number of both those who indicated an alternative association was desired, as well as those who did not. This reflected the fourth factor influencing the membership decisions of would-be members who did not join ISEA/NEA. The desire for an alternative association created a statistically significant difference related to longevity in education, building level, and attained education.

Table 12

#### *An Alternative Association as a Factor for Bypassing Membership*

Number 4 Factor for Bypassing ISEA/NEA Alternative Association Desired	(N=237)	Percent
Yes, an alternative association was a factor for bypassing membership	131	55.3
No, an alternatives association was not a factor	106	44.7

Longevity in education. While 64% of educators in the field for 10 years or less indicated an alternative association was a factor in their choice not to join ISEA/NEA, 47% of those teaching 11 to 20 years and 50% of veteran teachers agreed ( $\chi^2 = 18.71$ ,  $df = 3$ ,  $p < .000$ ).

Building level. While 61% of middle school educators and 63% of high school educators were more likely to desire an alternative association, 46% of those in pre-K/elementary schools indicated that having an alternative influenced their membership choice to bypass ISEA/NEA ( $\chi^2 = 14.31$ ,  $df = 3$ ,  $p = .003$ ).

Attained education. Those with specialists or doctorates were least inclined to favor an alternative association with 25% indicating this was a factor for not joining ISEA/NEA. Comparatively, 56% of those with master's degrees and 58% of those with bachelor's degrees agreed ( $\chi^2 = 15.48$ ,  $df = 3$ ,  $p = .001$ ).

As a reflection on the importance of choice to educators, additional respondent comments reflected the findings above. Many educators, who opted not to join ISEA/NEA, cited their support of the Right-to-Work legislation, which gives educators an option to not join the union. One teacher recalled, "I was forced to be in a union in Illinois and I did not like what they stood for and that we did not have a choice about whether or not to join." Another said, "I would never have joined the union, and if I was ever forced to join or pay [fair share dues], I would immediately quit teaching so that I would not have to give my money to their causes." Lastly, another said, "I was chastised regarding how I benefit directly through the local union negotiations with one person stating I was 'freeloading'. My response was that Iowa was a Right-to-Work state."

One teacher said, “By choosing PEI, I avoided the negative aspect of ISEA/NEA, and I still get the insurance and negotiating benefits that I need as a teacher.” Another teacher said, “PEI reflect similar standards, philosophies, and student centered issues. It was a no brainer. Our local does not have a solid reputation historically in serving employee needs.”

One teacher who opted not to join ISEA/NEA did a lot of digging before she made her membership decisions between PEI and ISEA/NEA. She says, “My husband is a business owner and has a lawyer that we have retained and handles his liability [insurance]. I actually went to him about a [private liability insurance policy] and he actually recommended that I join PEI. To have that kind of recommendation from a lawyer was huge. That was pretty profound for me.”

#### A Focus on Non-Education Issues

The fifth most common factor influencing educator’s choices to bypass ISEA/NEA was the perception of ISEA/NEA’s focus on issues unrelated to education, with 38% indicating the focus on what was perceived as “non-education” issues was a factor in not joining. Table 13 reflects the number of respondents who indicated the focus on non-education issues was a factor in bypassing ISEA/NEA membership, as well for those that it was not a factor. The focus on non-education issues created statistically significant differences related to gender, longevity in education, building level, attained education, political orientation, and political party affiliation.

Table 13

*Issues Unrelated to Education as a Factor for Bypassing Membership*

Number 5 Factor for Bypassing ISEA/NEA Non-education Issue Focus	(N=237)	Percent
Yes, non-education issue focus was a factor for bypassing membership	91	38.4
No, non-education issue focus was not a factor	146	61.6

Gender. While 56% of males cited ISEA/NEA's focus on non-education issues as a factor in not joining ISEA/NEA, 32% of females indicated the focus on non-education issues was a factor in bypassing ISEA/NEA membership ( $\chi^2 = 10.40$ ,  $df = 1$ ,  $p = .001$ ).

Longevity in education. While 55% of veteran teachers indicated the non-education issue focus was a factor in bypassing ISEA/NEA membership, 36% of those teaching 11 to 20 years and 35% of those teaching ten years or less concurred ( $\chi^2 = 17.16$ ,  $df = 3$ ,  $p = .001$ ).

Building level. While 55% of middle school educators were more inclined to cite non-education issues as a factor for bypassing ISEA/NEA, 46% of high school educators and 24% of Pre-K/elementary educators cited this as a factor ( $\chi^2 = 24.06$ ,  $df = 3$ ,  $p < .000$ ).



Attained education. Forty-two percent of those with master's degrees and 36% of those with bachelor's degrees indicated a focus on non-education issues was a factor in bypassing ISEA/NEA membership. Comparatively, 25% of those with specialist or doctoral degrees concurred ( $\chi^2 = 11.62$ ,  $df = 3$ ,  $p = .009$ ).

Political orientation. Politically, 49% of conservatives were more inclined to cite a non-education issue focus as a factor in not joining. Comparatively, 22% of moderates and 15% of liberals agreed ( $\chi^2 = 16.88$ ,  $df = 3$ ,  $p = .001$ ).

Political party affiliation. Similarly, 46% of Republicans and 40% of Independents cited the focus on non-education issues by ISEA/NEA as a factor for not joining ISEA/NEA. Notably, 10% of Democrats cited this as a factor as well ( $\chi^2 = 27.70$ ,  $df = 4$ ,  $p < .000$ ).

#### Top Factors for Bypassing ISEA/NEA Membership by Demographic

The top four factors for bypassing ISEA/NEA membership are highlighted for three of the demographic subgroups in Table 14.

#### Additional Factors Influencing the Choice to Bypass ISEA/NEA Membership

Although the following factors were not the top five factors that influenced educators' choices to bypass ISEA/NEA membership, the qualitative and quantitative data combined suggested the following factors were worthy of discussion. These factors include: (1) labor union connotation, (2) pressure, (3), labor union activities, (4) protection of poor teachers, (5) maintenance of the status quo, and (6) joining the local only.

Table 14

*Top Four Factors for Bypassing Membership by Demographic*

Top 4 Factors by Demographic			
Gender	Male	(N= 63)	
		Cost of dues	54 85.7
		ISEA/NEA politics	51 81.0
		Allocation of dues	47 74.6
	Female	Alternative organization	36 57.1
		(N=153)	
		Cost of dues	123 80.4
		Allocation of dues	106 69.3
Political Orientation	Liberals	(N=13)	
		Cost of dues	12 92.3
		Alternative organization	9 69.2
		Allocation of dues	6 46.2
	Moderates	Pressure	6 46.2
		(N=46)	
		Cost of dues	43 93.5
		Allocation of dues	28 60.9
	Conservatives	ISEA/NEA politics	27 58.7
		Alternative organization	26 56.5
		(N=134)	
		ISEA/NEA politics	115 85.8
Political Party Vote	Democrats	Allocation of dues	108 80.6
		Cost of dues	103 76.9
		Alternative organization	70 52.2
		(N=30)	
	Independents	Cost of dues	28 93.3
		Alternative organization	15 50.0
		Allocation of dues	12 40.0
		Pressure	11 36.7
Republicans	(N=20)		
	Cost of dues	18 90.0	
	Allocation of dues	16 80.0	
	ISEA/NEA politics	15 75.0	
	Alternative organization	9 40.0	
	(N=141)		
	ISEA/NEA politics	117 83.0	
	Allocation of dues	110 78.0	
	Cost of dues	109 77.3	
	Alternative organization	80 56.7	

*Note.* No statistically significant differences emerged between factors.

### Labor Union connotation

The connotation of ISEA/NEA as a labor union, as opposed to a professional association, was a factor for 38% of would-be members who opted not to join ISEA/NEA. Of the 90 survey respondents who indicated connotation as a labor union was a factor in not joining, 96% identified ISEA/NEA as a labor union, while 4% identified ISEA/NEA as a professional association ( $\chi^2 = 3.53$ ,  $df = 1$ ,  $p = .060$ ).

Table 15 highlights the number of respondents who indicated the connotation of a labor union influenced their choice to bypass ISEA/NEA membership. Union connotation created statistically significant differences related to longevity in education, building level, attained education, political orientation, and political party affiliation.

Longevity in education. While 52% of veteran teachers indicated concern for the connotation of a labor union, 34% of those teaching 11 to 20 years and 38% of those teaching ten years or less cited union connotation as a factor for not joining ( $\chi^2 = 15.69$ ,  $df = 3$ ,  $p = .001$ ).

Table 15

*Labor Union Connotation as a Factor for Bypassing Membership*

Number 6 Factor for Bypassing ISEA/NEA Labor Union Connotation	(N=237)	Percent
Yes, union connotation was a factor for bypassing membership	90	38.0
No, union connotation was not a factor	147	62.0

Building level. Over half of middle school educators at 52% were more inclined to consider connotation of a labor union in their decision not join. Comparatively, 41% of high school educators and 31% of pre-K/elementary educators cited this as a factor ( $\chi^2 = 13.38$ ,  $df = 3$ ,  $p = .004$ ).

Attained education. Additionally, 41% of those with bachelor's degrees and 39% of those with master's degrees shared connotation of a labor union as a factor for not joining ISEA/NEA. Comparatively, 25% of those with specialist or doctoral degrees concurred ( $\chi^2 = 11.40$ ,  $df = 3$ ,  $p = .010$ ).

Political orientation. Politically, 49% of conservatives and 35% of moderates indicated the connotation of a labor union as a factor for not joining ISEA/NEA. Conversely, 8% of liberals cited union connotation as a factor in not joining ( $\chi^2 = 16.50$ ,  $df = 3$ ,  $p = .001$ ).

Political party affiliation. Similarly, 49% of Republicans and 30% of Independents indicated labor union connotation as a factor for bypassing ISEA/NEA, while only 10% of Democrats agreed ( $\chi^2 = 28.64$ ,  $df = 4$ ,  $p < .000$ ).

Many anecdotal stories emerged that authenticated the data above, but also reflected the opinions of would-be members. Some believe ISEA/NEA is a professional association, or at least think their members believe that. One teacher described ISEA/NEA like this by saying, “[ISEA/NEA] views themselves as and are proud to be a union.” Another teacher said, “I work with wonderful teachers and they clearly make statements that being in the union shows professionalism.”

However, others voiced strong opinions that ISEA/NEA is a labor union disguised as a professional association. One vocal teacher said, “Professions do not have unions. There is no doctor union, dental union, engineer union, architecture union. I’m not against unions...workers in a plant need that. But for me if you don’t like what I’m doing or I don’t like what you are doing, I’ll go find another job.” Another said, “We call [ISEA/NEA] a professional organization, yet we keep describing it like a union- like the UAW. The NEA would disagree with that, but everything that keeps coming up is reflective of a union, [including] negotiations, protections. Not how are we advancing the cause of education.” Another said, “I see my role as a teacher as professional, one that required education that I paid dearly for. I do not see teachers as being the equal of plumbers or electricians- not that I believe there is anything wrong in those careers. I respect their knowledge and particular skill set. We certainly need their expertise. I just do not view them as a profession.” Another goes on to say,

I come from a family of long-time carpenters, all in the union. I see their blue collar labor as having the right to strike. But as servants of taxpayers, we have no right and should never think about exercising the right to strike for something we want as teachers. The students come first and that's why we became teachers.

### Pressure to Join

Pressure to join was a factor for 37% of those who had not previously joined ISEA/NEA. Despite the pressure exerted by ISEA/NEA to join, those would-be ISEA/NEA members chose not to join. Table 16 reflects the number of respondents indicating the pressure to join actually turned them away from ISEA/NEA. Pressure to join created statistically significant differences related to longevity in education and attained education.

Table 16

#### *Pressure to Join as a Factor for Bypassing Membership*

Number 7 Factor for Bypassing ISEA/NEA Pressure to Join	(N=237)	Percent
Yes, pressure to join was a factor for bypassing membership	88	37.1
No, pressure to join was not a factor	149	62.9

Longevity in education. Length in the field proved to be a pivotal factor, with 45% of those teaching 10 years or less describing pressure as a factor in not joining. Comparatively, 36% of those teaching 21 years or more and 30% of those teaching 11 to 20 years indicated pressure was a factor in bypassing ISEA/NEA membership ( $\chi^2 = 10.37$ ,  $df = 3$ ,  $p = .016$ ).

Attained education. Lastly, 42% of those with bachelor's degrees and 37% of those with master's degrees reported pressure as a factor for not joining. Notably, none of those with a specialist or doctoral degrees indicated this as a factor for bypassing ISEA/NEA membership ( $\chi^2 = 11.23$ ,  $df = 3$ ,  $p = .011$ ).

Level of pressure. Respondents were also asked to rank the level of pressure they felt from ISEA/NEA with regard to membership. Politically, moderates were more inclined to say the pressure was moderate or significant at 22%, compared to 15% of conservatives and 8% of liberals ( $\chi^2 = 17.39$ ,  $df = 9$ ,  $p = .043$ ). Also, 19% of Democrats, 13% of Independents, and 14% of Republicans expressed they felt moderate or significant pressure, while 37% of those who identify with another party indicated they felt moderate or significant pressure. Lastly, of the respondents who reported some degree of pressure by ISEA/NEA to join, 23% indicated they would characterize the pressure as bullying or harassment ( $\chi^2 = 20.67$ ,  $df = 3$ ,  $p < .000$ ).

Anecdotal stories reflect the findings of the previously shared data related to pressure. One teacher shared, "I felt like PEI was not as judgmental as the [union] folks approaching me at my school about the union. There were no phone calls from PEI about why I wasn't a member that I felt that from people at my school who were part of the

union. I felt pressured to join even if it wasn't the right for me." Another said, "I didn't want to join because that is what everyone was telling me to do. It didn't follow my beliefs." Another teacher described it like this by saying, "I felt ISEA/NEA were very aggressive in pursuing my membership. It made me uncomfortable."

A few teachers said they no longer receive the pressure they once did. One teacher said while there is no longer pressure to join, "The opinions of the union are blatantly stated, political prejudices are flaunted, and they belittle [non-members]." One teacher said, "I felt significant pressure when I first started teaching in my district. For the next several years, I received items in my school mailbox at the beginning of each school year. After that, I did not receive pressure or notifications."

Yet another educator shared, "The members of the union all know how I feel about joining and no longer confront me over issues or encourage me to join." Another teacher recalled, "The first year I did not join, the rep met with me and I set her straight with my feelings toward ISEA/NEA. I do not receive any pressure now." Lastly, another shared, "But in the past, I was the recipient of strong pressure. I had ISEA applications with my name and information already filled in thrust upon me."

One teacher made an interesting point and compared the level of pressure to the bullying schools are contending with between students. She says, "Yes. [The pressure to join ISEA/NEA] would not be tolerated and would be labeled as bullying if it was happening in the student population at school."



Teacher education programs. Pressure does not just occur within the school district where educators work. Many educators reported that the pressure to join starts at the pre-service level when they are in college. One teacher recalled, “We attended a large meeting as students at the university where all education majors were pressured to join ISEA/NEA. No other alternatives were discussed, but I had heard there were other options. I found the ‘cattle call’ and assumption that we had to sign up if we were going to be teachers distasteful and looked for other alternatives.” Another teacher said, “In college, the PEI representatives who visited my orientation class were much nicer than the ISEA representatives, who bashed PEI up and down. But PEI was positive.”

#### Labor Union Activities

Tied to the notion of pressure, lies the concern of other labor union activities that have made their way into education. Educators within this study identified such activities as contract negotiations, grievances, cronyism, and promotion of antagonistic relationships with organizational leaders. For those who had taught in other states prior to their time in Iowa, labor strikes also were a concern that emerged, despite being prohibited in Iowa. Many educators reported they believed these types of labor union activities are counter to the appropriate actions needed for a professional education association and today’s educational climate.

Of those citing labor union activities as a factor, 32% of non-ISEA/NEA members indicated labor union activities employed by ISEA/NEA were a deterrent to joining. Table 17 reflects the numbers of respondents who indicated labor union activities as a

factor for bypassing ISEA/NEA membership. Labor union activities created statistically significant differences related to building level, level of education, and political party affiliation.

Table 17

*Labor Union Activities as a Factor for Bypassing Membership*

Number 8 Factor for Bypassing ISEA/NEA Traditional Union Tactics	(N=237)	Percent
Yes, union tactics were a factor for bypassing membership	76	32.1
No, union tactics were not a factor	161	67.9

Building level. While 39% of middle school educators cited labor union activities as a deterrent to joining ISEA/NEA, 36% of high school educators agreed.

Comparatively, while 28% of pre-K/elementary educators agreed that labor union activities were a hindrance to joining ISEA/NEA ( $\chi^2 = 8.89$ ,  $df = 3$ ,  $p = .031$ ).

Attained education. Also, 50% of those with specialist and doctoral degrees indicated labor union activities as a factor to bypass ISEA/NEA membership. Comparatively, 35% of those with bachelor's and 32% of those with master's degrees concurred ( $\chi^2 = 10.88$ ,  $df = 3$ ,  $p = .012$ ).

Political party affiliation. Lastly, 45% of Independents and 36% of Republicans cited labor union activities as a factor for not joining ISEA/NEA. Comparatively, 13% of Democrats shared the same sentiments ( $\chi^2 = 17.37$ ,  $df = 4$ ,  $p = .002$ ).

Respondents expressed thoughts on the labor union activities employed by today's teachers' unions. The approach to contract negotiations is one union activity that non-members struggled with. One teacher said, "When our local union was with ISEA/NEA, only four to six [educators] were members and [they] represented the whole school. They started the bargaining process the last year with an outrageously high pay request, when the rest of us knew the economy would never support it. It just lengthened the whole contract process and we didn't have contracts until July." Another commented, "The union is providing policies and procedures that are working against trying to help kids and increase test scores."

Many non-members are concerned about the perception the union created in education. One teacher said, "I think teachers are less and less perceived as professionals. I think it has to do with our attitude and our willingness to do what needs to be done." For example, one teacher said, "We all want to be paid- that is part of the job. But I can think of the number of times where we have training and [union teachers] ask, 'Are we going to get paid for that' or 'how much are we going to get paid?'"

Related to the contractual piece are the concerns about grievances, thought by many non-union educators, to deter progress. As one teacher said, "I think too many teachers rely on the union for everything. Every single time something goes a little wrong, they go to the union, union, union. Grievance, yes. It is not about education

anymore. It is about what is in it for me. Don't screw me over. I hear it all the time. 'Go to the union, go to the union.'" Another teacher said, "It's all about the teachers- that is my biggest gripe. I said, 'show me a union for kids and I'll join that.'"

Another teacher described the concern of "cronyism" within the higher union ranks by saying, "The union teachers in our building are more interested in protecting themselves than advocating for students." Another reiterated that she wouldn't join under any circumstance because, "My money would still be paying people at the top and people who do not promote teamwork among school administrators and teachers." Yet another said the union is filled with "power hungry bureaucrats." Another said she would have joined, but "prefers an organization that isn't as power hungry."

For some, the antagonistic relationships and an "us versus them" mentality encouraged by ISEA/NEA weighed heavily. One teacher strongly shared, "[Union leaders] are also aware of my feelings of how they have divided our staff and caused a lot of internal strife." Another said, "In my previous district, members were very antagonistic once they discovered that I wasn't and didn't plan to be part of the union, which made my choice not to join even more grounded. I refused to be part of an organization that is that rude."

### Support of Poor Teachers

Just over one quarter, 26%, of those opting out of ISEA/NEA cited the perception of supporting poor teachers as a factor in not joining ISEA/NEA. Table 18 reflects the numbers of those who indicated the support of poor teachers was a factor in bypassing ISEA/NEA, as well as those who did not indicate this as a factor. The support of poor

teachers created a statistically significant difference related to gender, longevity in education, building level, attained education, and political party affiliation.

Gender. Gender differences were significant with 43% of males citing the support of poor teachers as a factor in bypassing ISEA/NEA membership and 21% percent of females agreeing ( $\chi^2 = 10.82$ ,  $df = 1$ ,  $p = .001$ ).

Longevity in education. Length in the field reflected a statistical significance related to the support of poor teachers. Of those teaching ten years or less, 31% indicated concern for the protection of poor teachers, while 23% of those teaching 11 to 20 years, and 24% of veteran teachers in the field for 21 years or longer concurred ( $\chi^2 = 10.26$ ,  $df = 3$ ,  $p = .017$ ).

Table 18

*Support of Poor Teachers as a Factor for Bypassing Membership*

Number 9 Factor for Bypassing ISEA/NEA Support of Poor Teachers	(N=237)	Percent
Yes, support of poor teachers was a factor for bypassing membership	62	26.2
No, support of poor teachers was not a factor	175	73.8

Building level. Middle school educators were more inclined to perceive ISEA/NEA as protecting poor teachers with 41% indicating as such. Comparatively, 28% of high school educators and 21% of pre-K/elementary educators indicated the protection of poor teachers impeded their willingness to join ISEA/NEA ( $\chi^2 = 14.82$ ,  $df = 3$ ,  $p = .002$ ).

Attained education. Lastly, 50% of those with specialist or doctoral degrees indicated concern about the support of poor teachers. Comparatively, 28% of those with master's degrees and 26% of those with bachelor's degrees concurred that this was a factor influencing their choice not to join ISEA/NEA ( $\chi^2 = 11.11$ ,  $df = 3$ ,  $p = .011$ ).

Political party affiliation. Politically, 31% of Republicans and 25% of Independents were concerned about the perceived support of poor teachers. Notably, only 10% of Democrats cited the protections of poor teachers as a factor in bypassing ISEA/NEA membership ( $\chi^2 = 12.38$ ,  $df = 4$ ,  $p = .015$ ).

Respondent's comments reiterated the sentiments shared in the findings above. A self-identified liberal teacher said, "I watched the documentary 'Waiting for Superman' and part of the big push was about the teachers unions destroying education because they keep teachers in jobs that they shouldn't be in." Another said, "It was just upsetting to me to learn that the NEA does things to help teachers who shouldn't be teachers. If you suck at teaching, you shouldn't get to stay in the classroom. But the teachers' union often times supports them so they can keep their jobs."

One teacher shared, "In my building the union rep is very concerned about protecting a poor teacher who at the moment has a poor evaluation from the principal, but

seems to have no concern for the 25 students getting a poor education from [that] poor teacher.” Yet, another educator went so far as to say [we have] local people there who I would call ‘death on children.’” Another teacher said, “I remember saying to one of my administrators, ‘Wow, that person is really burned out’. He said, ‘No, they would have had to have once been on fire.’ The union is like a herd. If there is a lame animal, the big bulls get around it and protect it. That’s how the union [is]. There are people out there who don’t belong in education.”

#### Perception of the Status Quo

Tied to the perception of protection for poor teachers, is the perception that ISEA/NEA supports the status quo in public education. Of respondents, 24% of those who had not joined ISEA/NEA indicated it was their perception that ISEA/NEA maintained the status quo and was a factor in bypassing ISEA/NEA membership. Table 19 reflects both the number of those who indicated status quo as a factor for bypassing ISEA/NEA and those who did not. The perception of status quo created a statistically significant difference related to gender, longevity in education, building level, and political party affiliation.

Table 19

*Perception of the Status Quo as a Factor for Bypassing Membership*

Number 10 Factor for Bypassing ISEA/NEA Perception of Status Quo	(N=237)	Percent
Yes, perception of status quo was a factor for bypassing membership	57	24.1
No, perception of status quo was not a factor	180	75.9

Gender. Gender differences were statistically significant. While 37% of males cited ISEA/NEA's support of the status quo as a factor for bypassing membership, 20% of females agreed ( $\chi^2 = 6.88$  df = 1, p = .009).

Longevity in education. Both those teaching ten years or less and those teaching 11 to 20 years indicated concern for the protection of the status quo with 27% weighing in on this as a concern. Additionally, 14% of veteran teachers in the field for 21 years or longer indicated ISEA/NEA's protection of the status quo was a factor in bypassing membership ( $\chi^2 = 10.75$ , df = 3, p = .013).

Building level. Middle school educators were more inclined to perceive ISEA/NEA as protecting the status quo. While 41% of middle school educators cited status quo as a concern, 25% of high school educators and 12% of pre-K/elementary educators indicated the preservation of the status quo was a factor in bypassing membership ( $\chi^2 = 15.76$ , df = 3, p = .001).



Political party affiliation. Politically, 25% of Republicans cited the perception of status quo as a factor in bypassing ISEA/NEA membership. Comparatively, 15% of Independents and 17% of Democrats shared the same sentiments ( $\chi^2 = 11.34$ ,  $df = 4$ ,  $p = .023$ ).

Feeding into this perception of status quo, one teacher said, “The union teachers in our building do not show a positive outlook about how they can influence student achievement. Union teachers seem to accept low achievement as ‘that’s just the way it is’ and ‘there is only so much we can do’.” Another teacher wondered, “ISEA/NEA promotes advances to keep their union jobs, but are these advances actually helping students?” Yet another said, “Unions in general do not allow for change. They are there to protect the jobs that people already have and that means not changing anything.” Another teacher concurred when saying, “[ISEA/NEA] does not even support status quo with their current ideologies. They are lowering educational standards. The biggest hindrance is that they are an ‘employees’ union and not an association that promotes the betterment of education.”

Status quo or advancing public education. To dig deeper into this status quo perception for those who opted not to join ISEA/NEA, respondents were later asked to identify if they believed ISEA/NEA promoted the status quo in public education or advanced public education in an effective way for students. While 51% of would-be members indicated they believed ISEA/NEA fostered the status quo, 48% believed it was

a split between the status quo and advancing education. Most notably, only 1% reported that ISEA/NEA advanced education in a meaningful way for students ( $\chi^2 = 7.67$ ,  $df = 3$ ,  $p = .053$ ).

#### Educator or Student-First Organization

Tied to the idea of ISEA/NEA supporting the status quo in education is the perception of ISEA/NEA as an “educator-first” or “student-first” organization. This reflects the perception of where ISEA/NEA most directs its energies and aim to benefit-educators or students. When would-be members were asked to identify whether ISEA/NEA was an educator or student-first organization, 60% reported ISEA/NEA was an educator-first organization, while 27% indicated it struck a balance between educators and students. Most notable, is that less than 1% indicated ISEA/NEA was a student-first organization. Also of importance to reflect on is the comparison of perceptions about both status quo and whether ISEA/NEA is educators-first oriented. Table 20 reflects the intersection of these two variables.

Some teachers shared concern that ISEA/NEA was not a student-focused organization. Their sentiments sound like, “I would like to see the sole focus to be on the teachers doing what is in the best interest of the students” or “As a union, [an educator focus] should be their focus, but they try to deceive their members and the public at large, making them think ISEA/NEA puts children first.”

Table 20

*Perceptions of Status Quo and Educator-First Focus*

ISEA/NEA Focus	Degree to which ISEA/NEA Advances Education (N)	Maintain Status Quo		Balance b/t Status quo and Advance Education		Advance Education	
		N	Percent	N	Percent	N	Percent
Educators First	(N=140)	96	69.0	42	30.0	2	1.0
Balance b/t Educators/Students	(N= 61)	7	11.0	54	89.0	0	0.0
Students First	(N = 1)	0	0.0	1	100.0	0	0.0

*Note.* This table analyzes the intersection of two different sets of data. The first measure relates to the perception whether the ISEA/NEA supports the status quo or advances education on a continuum, which is reflected in the rows. The second measure relates to the perception of whether ISEA/NEA is an educator focused group or a student focused group, which is reflected in the columns. This table reflects the intersection of the two perceptions (i.e., 1% of those who perceive ISEA/NEA to be an educator-first organization, they also believe that ISEA/NEA advance education).

Joining the Local Only

Joining the local only was not an option on the survey related to bypassing ISEA/NEA membership on the multiple response question, however, the theme of only joining the local emerged regularly. Of those who opted not to join ISEA/NEA at all, 45% indicated they would consider joining their local union if allowed. That said, 55% indicated they would remain non-members regardless of the choice.

The option to join the local only was appealing to a good many educators and as one educator put it, “Most people want to know how they are represented in the [district],

not as part of the state or national [union]. They are concerned about contract time, money, things like that.”

Despite the desire to join locally, it was made clear to many educators joining the local was not a viable option due to the unified dues policy. One teacher recalled, “I used to send them a voluntary contribution for the local and UniServ portion of the dues. [UniServ is a national and state level initiative focused on establishing and maintaining effective local union affiliates]. One year they returned it and said, ‘They were not interested in my money if I did not join.’” Another said, “I even asked if I could give them the money for the local level. I was refused the opportunity of giving the gift of money.” Another said, “I tried to make a donation to the local only and they wouldn’t take it. I also tried to buy them supper when they were working on negotiations but they would not accept it.”

### Emotions

Table 21 highlights the emotions educators experienced related to their choice not to join ISEA/NEA. Respondents were asked to choose all that apply from a list of seven emotions. Very few statistically significant relationships emerged within each individual emotion for the non-members of ISEA/NEA.

While many non-members reported having many negative emotions associated because they simply had not been and would not be members of ISEA/NEA, that is not the case for others. As one teacher said, “I knew I made the right decision [not to join] so, none of these emotions apply.” Another said she didn’t feel these emotions because, “I was treated poorly by a few hard core union members, but my values are more

important.” Another teacher remarked, “I have never really felt anything but relief that I have not joined the ISEA/NEA.”

Guilt. Only one statistically significant difference emerged related to this emotion. Broken down by political orientation, 43% of Democrats, 28% of Republicans and 20% of Independents reported feeling guilty ( $\chi^2 = 10.41$ ,  $df = 4$ ,  $p = .034$ ).

For those who did report feeling guilty, it appeared to center around the local union doing the work of negotiations and not having an active involvement in that. “I feel badly that the union [does the work of] negotiations,” said one teacher. Another teacher said, “Possibly guilt because at times it does feel like I am riding on someone else’s coat tails.”

Table 21

*Emotions Non-ISEA/NEA Members Experienced*

Emotions Experienced Related to Membership Choices	Previous ISEA (N = 138)	Percent
Guilt	62	44.9
Frustration	59	42.8
Embarrassment	40	29.0
Anger	26	18.8
Fear	25	18.1
Disappointment	22	15.9
Surprise	17	12.3

Another teacher indicated that to ease the guilt of not being a member she made “a number of anonymous donation to my local teacher’s union because [she had] benefitted from their work.” Another said, “Being in PEI prohibits me from participating in local negotiations. I sometimes feel that I am not being a team player in regards to this and others might frown upon this. Although no one has ever said anything to me personally, I sometimes feel like I get a cold shoulder from some in the union.”

Frustration. Only one statistically significant difference emerged related to frustration. While 31% of those with Master’s degrees were more inclined to feel frustration related to ISEA/NEA, 24% of those with Bachelor’s and none of those with Specialist or Doctoral degrees agreed ( $\chi^2 = 8.07$ ,  $df = 3$ ,  $p = .045$ ).

One teacher shared frustration about the relentless approach to recruiting. She said, “It took a while, but now I am no longer asked to join. I believe in people’s rights to join or not join. I am totally against forced membership.”

Many teachers expressed frustration at the feeling of isolation, ignored, or being out of the loop. One teacher mentioned, “I am subjected to philosophies of my district that do not allow me to participate [in some things]. The district typically chooses members of the union to participate in initiatives.” Another said, “We are excluded from negotiation meetings and contract information.” Yet another shared, “Once my affiliation was known, I was no longer approached to join the union. I was however out of the loop on decisions and had to rely on friends or lunch conversations to inform me.”

Another teacher told of a time when she just started her teaching in a new district and “went to the [union] meeting just for information but was quickly escorted out of the

room by the president who said, ‘You don’t belong here.’” One more teacher said, “It is frustrating being left off committees and out of the loop with decisions affecting the school.” Another said, “I know it is my choice not to join. The only time I feel pressure is when I’m not included in meetings that affect my building.” Lastly, one teacher said of the isolation, “I am not allowed to know information about what is happening because I am not an ISEA member. I feel ostracized, but don’t let it bother me. I have spoken up before and the local ISEA president didn’t like that I informed the staff that they had another choice.”

Embarrassment. No statistically significant differences emerged related to this emotion. One teacher recalled feeling “embarrassed when [they had a] representative from PEI come and speak to those that were interested in joining and the union representative brought in a representative and they were very rude and combative toward PEI.”

Fear. No statistically significant differences emerged related to this emotion. One teacher said, “At times I fear if it is known that I don’t belong, I will be treated differently.” Yet another teacher recalled, “Years ago I was sent a very detailed and threatening letter regarding my lack of membership in the local union. I have kept the letter to remind me of that negative experience. I did not join the union even after the threats.”

Surprise. No statistically significant differences emerged related to this emotion. One teacher recalled that she felt surprised when she perceived others “looked down upon when not joining and the conversations turned into lectures.” Another said she was

surprised when “A member in my district sent out a district wide email announcing that I had left ISEA and that I had joined PEI. It also included why I had left. At this point, I had not told anyone that I had joined PEI or why I had left ISEA.” Another said she was surprised at the response from a union leader when she opted not to join. She “was told by our school’s union leader that he would be waiting to tell me ‘I told you so’ when I get fired for doing something stupid and that I was a damn fool for not joining.”

#### Joining ISEA/NEA

The fourth research question sought to address the factors that influenced the decisions of educators to initially join ISEA/NEA. The top five factors for joining ISEA/NEA membership will be briefly explored. This will be followed up by a more in-depth analysis of the factors, which will reflect the findings from both quantitative and qualitative data gathered. The quantitative data reflects the findings from the survey utilized in this study. The qualitative data incorporates the use of quotes derived from both the focus group participants and the narrative provided by respondents in the survey comment boxes.

#### All Factors for Joining ISEA/NEA

Survey participants were asked to identify the factors that led them to join ISEA/NEA. Respondents could choose as many factors as applicable of twelve options. Table 22 reflects the factors that influenced educator’s choices to previously join ISEA/NEA.



Table 22

*Factors Influencing Joining ISEA/NEA*

Reasons for Joining ISEA	<i>N</i> (N = 415)	<i>Percent</i>
1 Liability/Insurance Protections	304	73.3
2 Felt pressured to join	186	44.8
3 Believed I had no choice	186	44.8
4 Told "it is just something you do"	174	41.9
5 Support local union efforts	160	38.6
6 Not want to be perceived as freelo	76	18.3
7 Professional nature of the union	52	12.5
8 Continued my student membership	34	8.2
9 Support state and national union ef	30	7.2
10 Professional resources provided	29	7.0
11 Financial incentives	23	5.5
12 Support union's political activity	9	2.2

Overview of the Top 5 Factors for Joining ISEA/NEA

The top five factors for joining ISEA/NEA will be briefly explored prior to an in-depth analysis. First, nearly three quarters of respondents indicated liability insurance protections as the primary reason for joining ISEA. Second, 45% of survey respondents also indicated they felt pressured to join. Third, another 45% of respondents believed they had no choice but to join ISEA/NEA. Fourth, 42% of respondents reported joining because “it is just something you do as a teacher.” Lastly, 39% joined because they wanted to support the efforts of the local union. The following section will break down

the top 5 factors, as well as provide insight into statistically significant relationships which emerged among the factors.

### Liability Insurance Protections

As the number one factor, 73% of all former members agreed liability insurance was the number one factor for joining ISEA/NEA. In terms of those who joined for the liability insurance protections, several statistically significant findings emerged. Table 23 reflects the number of respondents who indicated liability insurance was a factor in joining ISEA/NEA versus those who did not. Liability insurance created three statistically significant differences related to longevity as an ISEA/NEA member, building level, and political orientation.

Longevity of ISEA/NEA membership. Length of ISEA/NEA membership reflected a statistical significance as it related to liability insurance protections. While 68% of ISEA/NEA members who had belonged for 10 years or less indicated insurance as a primary reason for joining, 84% of those who belonged for 11 to 20 years and 93% of those who belonged for 21 years or more shared the same reason for joining ( $\chi^2 = 11.93$ ,  $df = 3$ ,  $p = .008$ ).

Building level. The level of building reflected statistical significance to insurance as a reason for joining. While 68% of pre-K/elementary educators chose insurance as a primary reason for joining, 72% of middle school educators, and 81% of high school educators indicated the same ( $\chi^2 = 8.68$ ,  $df = 3$ ,  $p = .034$ ).

Table 23

*Liability Insurance as a Factor for Joining ISEA/NEA*

Number 1 Factor for Joining ISEA/NEA Liability Insurance	(N=415)	Percent
Yes, liability insurance was a factor in joining	304	73.3
No, liability insurance was not a factor	111	26.7

Political orientation. Political orientation reflected statistical significance. While, 83% of liberals indicated liability insurance protections as a primary reason for joining, 77% of moderates and 74% of conservatives agreed ( $\chi^2 = 17.84$ ,  $df = 3$ ,  $p < .000$ ).

To further corroborate the quantitative findings, many former members provided anecdotal accounts related to liability insurance coverage as a factor for joining. One educator said of the need for liability coverage, “We can’t throw out the idea that we can have someone take advantage of you. We need to have that security in place and know who will be there to back you up if needed. There needs to be a fair balance- we shouldn’t be able to do whatever we want, but there needs to be security also.”

One teacher admitted that “The political activity of NEA is what made me hesitant to join, but that I caved for the liability coverage.” Another said, “I was told it protects you from being sued, so I joined.” Yet another said, “I knew I would want representation in case some unfortunate event occurred in my science classroom.” Yet another said, “I was silly enough not to question what my dues were being used for. I was

spending \$600 a year for the ‘just in case’ thing- the insurance. I just trusted my dues would come back to me in a beneficial way if I needed it.”

One teacher-coach said, “I was a coach at a school known as the ‘coach’s graveyard’. I wanted protection against parents.” Another said, “I refused to join ISEA/NEA for many years because of my strong beliefs that are in conflict with ISEA/NEA politics. A [few years] ago, I was threatened by an administrator and given extremely unfair [and] untrue evaluations. Because of the relationships she had with the ISEA people- there had been another situation in which she had been unethical- I believed it was in my best interest at that moment to join ISEA.” Another teacher recalled,

I was told I would have to join the NEA. When I brought up the fact that NEA does not support our values and beliefs here in Northwestern Iowa and I would not have a ‘voice’ in regards to where funds were allocation, my questions went unanswered. Our building representative told me the main reason people join the ISEA and NEA was to have the legal support, not educational support.

### Pressure to Join

Pressure to join was the second most common factor for joining, with 45% of former members indicating this was a primary reason for joining ISEA/NEA. Table 24 reflects the number of respondents who indicated pressure was a factor in joining ISEA/NEA, as well as those who did not. Pressure to join created statistically significant differences related to gender and longevity in ISEA/NEA.

Table 24

*Pressure as a Factor for Joining ISEA/NEA*

Number 2 Factor for Joining ISEA/NEA Pressure to Join	(N=415)	Percent
Yes, pressure was a factor in joining	186	44.8
No, pressure was not a factor	229	55.2

Gender. A statistical significance between pressure to join and gender emerged with 53% of males reported pressure as a factor in joining, while only 42% of females felt pressure to join ( $\chi^2 = 3.89$ ,  $df = 1$ ,  $p = .049$ ).

Longevity in ISEA/NEA. For members who belonged to ISEA/NEA for 10 years or less and those who had belonged for 21 years or more, 50% of them indicated pressure was a factor in joining. Additionally, only 21% of those who had belonged to ISEA/NEA for 11 to 20 years felt pressure to join ( $\chi^2 = 22.98$ ,  $df = 1$ ,  $p < .000$ ).

Respondents were also asked about the level of pressure they still receive to join ISEA/NEA now that they are former members. Although no statistically significant differences emerged, 37% indicated they no longer felt pressure to join, but 63% indicated they felt some level of pressure. Of those feeling pressure, 18% indicated it was moderate or significant in nature and 29% indicated they would characterize the pressure as bullying or harassing in nature.

Former member's stories illustrate the type of pressure they felt. One former member shared that once ISEA/NEA membership was discontinued, union

representatives would still contact her about joining. After not renewing membership, she said they worked to marginalize her when “a list of ‘non-joiners’ was put on [the] work table in the teacher’s lounge.” Another teacher shared the story about the union “sending someone to my room with an enrollment form and tell me that in no uncertain terms, that I really needed to join. You had to be there to appreciate the intimidation atmosphere. And there were always the snide and cutting remarks about ‘scabs’ and ‘low lifes’ that were subtly dropped around me.” Lastly, another said, “When I first moved to a new school 13 years ago, it was to that point [of bullying/harassment] and I went to the teacher harassing me and explained that if she didn’t quit, I would have to report her. It was my right to not join the union. She quit immediately.”

The perception of intimidation resonated with former members. One teacher said, “I hated the pressure and downright bullying from my fellow colleagues when it came to the local, state, and national unions. It wasn’t a question of ‘if’ a new teacher would join, but ‘be careful if you don’t.’” Yet another teacher said, “When I started teaching at my current district, I received harassing letters and emails from the president of the local education association. These communiques were mean-spirited, pressure-filled, and unprofessional. The leaders of the local association tried to ‘shame’ me into joining.”

Lastly, another said,

The district ISEA representative introduced ISEA at the new employee orientation and strongly hinted that she wanted you to sign up right then and there before you left the room for lunch. This would not have allowed time for additional research or even cost comparison through the year. It looked very expensive at a glance. She assumed that everyone in the room would sign up for ISEA without major questions and talked with that kind of mentality. She never said you had to sign up, but she did not give time to think about it and did not mention that there were other options available, too.

Pressure did not only relate to the joining process, but also in the discontinuation of membership. One teacher said, “I don’t recall receiving much pressure to join the union originally, but when I wanted to leave I was certainly bullied and harassed by the local representative.” Another said, “The first year after I left the union, I received some nasty correspondence from the local association president touting the benefits of joining.” A male teacher said, “I joined one year and the next year I didn’t sign and three union members walked in my room, shut the door, sat around me at my desk, and tried to convince me that what I was doing was wrong by not joining the union.”

One teacher recalled, “The tone and the questioning a [member] teacher took with me was offensive and the wording of the letter sent was pretty questionable... it was like a ‘join or else’ letter. Another teacher indicated, “I also felt that I would be ostracized by my peers as a new employee in a new school district if I didn’t join. This was my own internal belief and not something I was told or led to believe.” One teacher described her experience with joining the union like this,

When I went to the public school, I was approached right away by union members and they would say, ‘you have to join and you need to sign this paper and so much was going to come out of your check. You won’t even see it, you won’t even know it is gone since it comes directly out of your check’. But then a few people introduced me to PEI. It was drastically cheaper- a couple months of union fees for the entire school year. I called PEI and they were nice and explained what they stood of and a lot of their views lined up with mine and they weren’t pushy. They were super supportive about whatever decision I wanted to make. Then the people from the union continued to be like, ‘You have to sign, you have to sign, this is your deadline, turn your paper in, you won’t even know that it was coming out of their check’. [ISEA/NEA] really turned me off.”

Bullying was a theme that emerged repeatedly by participants in this study. One teacher said, “I did feel a little bullied. When I would ask them questions, they would get very defensive. I wasn’t asking in a mean way, I was just curious.” A male teacher indicated, “Part of membership is just pressure to join, versus advocacy and telling you what your money is going to. There is a group think mentality to ‘just join the union.’” Another focus group participant said, “I continually feel bullied across the district within my [disciplinary] group because one of our members is a rep for the [local] and she must know I’m not a member. Every time something comes up or we get something positive, she says, ‘This is our [local] money at work. I feel very bullied at work.’”

One teacher applied the same standard for bullying and harassment in the classroom to the teachers union by saying, “If that happened in the classroom, you wouldn’t allow it. Isn’t it interesting that as adult we are being treated in a way we wouldn’t allow our kids to be treated?” Another teacher shared that she had been “personally questioned by another about my reason for not being in [ISEA]. I have had an anonymous letter sent to my house about the ramification of not being a member of the local/ISEA/NEA. One of the [union] officers emailed another teacher that is not involved and asked her to gather other non-members and meet with an ISEA representative to clarify our reasoning for not joining. It is not an ‘all the time; pressure, but extreme tactics were taken on occasion.’”

### No Choice

The third factor for joining related to the belief of educators that they did not have a choice, but to join ISEA/NEA. Notably, 45% of former members were under the



impression they had no choice. Some were led to believe they had to join. Some even believed it was legally mandated, while others admittedly interpreted that they had no choice in joining. Additionally, many admitted to not knowing there were other professional organization choices available to them and that they had the right to choose. Table 25 reflects the number of respondents who joined because they believed they had no choice, as well as those that did not. There were no statistically significant differences that emerged.

Table 25

*No Choice as a Factor for Joining ISEA/NEA*

Number 3 Factor for Joining ISEA/NEA No Choice	(N=415)	Percent
Yes, belief of no choice was a factor in joining	186	44.8
No, belief of no choice was not a factor	229	55.2

One teacher said, “As a new teacher, I assumed enrolling was part of my job in the school district. It was not presented to me as an option.” Another teacher said, “I didn’t know I had other options and I knew I needed the protection, so I joined.” One other teacher said, “I would have preferred not to join due to their political activity, but I didn’t know I had an option.” Lastly, another said, “I feel that [joining ISEA/NEA] should be presented as an option, just as PEI or any other organization should be. Anything after that should be considered harassment.”

One study participant recalled a representative of the local visiting her five times and brought the sign-up paperwork each time. She says, “She inevitably convinced me that this was something I needed to do and that I didn’t have a choice. Then when I realized I had a choice, I was very angry and felt like she was misleading me that I wouldn’t be able to keep my job if I didn’t join.”

Another veteran teacher shared the story of the union representative coming in with a form and said, “Here is your union form and everyone is in [the union]. As a young person I [didn’t] want to make any waves and just did it because I was the new guy. I haven’t been a member of the union since 1996 and every year I have told them over and over again why I am not a member and every year they come and say, ‘You need to join the union. You are the only one.’”

#### It Is Just What You Do

In the case of joining the teacher’s union, new educators reported that they were informed from the onset of employment, that ISEA/NEA membership is important and expected. Notably, 42% indicated the fourth factor influencing why former ISEA/NEA members joined had to do with the notion of “It is just what you do.” Table 26 reflects the number of respondents who indicated that “It is just what you do” drove their choice to join ISEA/NEA, as well as those who did not. This belief created one statistically significant difference related to building level.

Table 26

*"It Is Just What You Do" as a Factor for Joining ISEA/NEA*

Number 4 Factor for Joining ISEA/NEA It Is Just What You Do	(N=415)	Percent
Yes, "It is just what you do" was a factor in joining	174	41.9
No, "It is just what you do" was not a factor	241	58.1

Building level. The level of building respondents worked in had a significant association for those answering "it is just what you do." While 44% of pre-K/elementary educators chose "It is just what you do" as a primary reason for joining, 45% of middle school educators and 41% of high school educators also selected this factor ( $\chi^2 = 9.48$ ,  $df = 3$ ,  $p = .024$ ).

One young teacher said, "As a first year teacher I thought it was just something I should do." Another teacher said, "As a young teacher, I thought this is just what I'm supposed to do." Reiterating that, another teacher said, "As a first year high school teacher, I just thought it was what we all did. I was very naïve."

Support Local Union

The fifth factor for joining, supporting the local union, was signified by 39% of respondents. Table 27 reflects those who indicated support for the local union as a factor for joining, as well as those who did not signify this. Supporting the local union reflected several statistically significant differences related to longevity in education, longevity in ISEA/NEA, and political orientation.

Table 27

*Support the Local Union as a Factor for Joining ISEA/NEA*

Number 5 Factor for Joining ISEA/NEA Support Local Union	(N=415)	Percent
Yes, supporting the local was a factor in joining	160	38.6
No, supporting the local was not a factor	255	61.4

Longevity in education. Length of time as an educator also emerged as having a statistically significant difference when considering support for the local as a factor for joining. While 20% of those who have been educators for 10 years or less indicated supporting the local as a reason for joining, 32% of those who had taught between 11 and 20 years, and 48% of those who had been in the field 21 years or more agreed ( $\chi^2 = 21.99$ ,  $df = 3$ ,  $p < .000$ ).

Longevity in ISEA/NEA. Additionally, length of time in ISEA/NEA reflected statistical significance for supporting the local. While 31% of those who had been an ISEA/NEA member for 10 years or less supported the local as a reason for joining, 54% of those in ISEA/NEA for 11 to 20 years did. A stark contrast is that of educators who belonged to ISEA/NEA for 21 years or more with 93% indicating a reason for joining was to support local efforts ( $\chi^2 = 34.33$ ,  $df = 3$ ,  $p < .000$ ).

Political orientation. When considering political orientation, 38% of liberals and 50% of moderates reflected the desire to support the local, while 35% of conservatives said the same ( $\chi^2 = 9.03$ ,  $df = 3$ ,  $p = .029$ ).

Many educators in this study reported being appreciative of the work the local does on the behalf of all teachers. Yet, a conflict emerged for many when they want to support the local, but to do so, must join at the state and national level. And for others the desire to support the local came out of guilt. One respondent said, “I got the ‘look at all the money we make for you and we fight for your and you have this amount of planning time and these recess duties and we protect you and it helps you get breaks and you will be treated unfairly if you don’t have this.”

#### ISEA/NEA Political Activity

Although the previous section focused on top five reasons for joining ISEA/NEA, it is important to note the least common factor in joining due to its relevance to this study. It is highlighted because of the importance toward the larger research questions about how ISEA/NEA political activity influenced membership choices. The last reason former ISEA/NEA members joined was to support the union’s political activity. Only 2% of all former members indicated supporting ISEA/NEA political activity as a reason for joining.

Table 28 reflects the number of those who indicated supporting ISEA/NEA political activity was a factor in joining, as well as for those who did not. It is also important to note that due to the small sample size for those who indicated support for the ISEA/NEA political activity as a factor in joining, the statistically significant differences could not be attained accurately.

Table 28

*Support Political Activity as a Factor for Joining ISEA/NEA*

Number 12 Factor for Joining ISEA/NEA Support ISEA/NEA Political Activity	(N=415)	Percent
Yes, supporting political activity was a factor in joining	9	2.2
No, supporting political activity was not a factor	406	97.8

Top Factors for Joining by Demographic

The top four factors for joining ISEA/NEA membership are highlighted for a few of the demographic subgroups in Table 29.

Table 29

*Top Four Factors for Joining ISEA/NEA by Demographic*

Top 4 Factors by Demographic			Previous ISEA (N = 415)	Percent	
Gender	Male	Insurance/Protections	83	0.77	
		Pressure	57	0.53	
		It is what you do	48	0.45	
		Believed had no choice	44	0.41	
	Female	Insurance/Protections	203	0.71	
		Believed had no choice	130	0.45	
		Pressure	121	0.42	
		It is what you do	120	0.42	
Political Orientation	Liberals	Insurance/Protections	20	0.83	
		Pressure	10	0.42	
		Believed had no choice	9	0.38	
		It is what you do	9	0.38	
		Support local	9	0.38	
	Moderates	Insurance/Protections	70	0.77	
		Support local	45	0.50	
		Pressure	38	0.42	
		It is what you do	35	0.39	
	Conservatives	Insurance/Protections	165	0.74	
		Pressure	105	0.47	
		Believed had no choice	102	0.46	
		It is what you do	100	0.45	
	Political Party Vote	Democrats	Insurance/Protections	53	0.73
			It is what you do	33	0.45
			Support local	30	0.41
Believed had no choice			28	0.38	
Independents		Insurance/Protections	38	0.67	
		Believed had no choice	31	0.54	
		It is what you do	23	0.40	
		Pressure	22	0.39	
Republicans		Insurance/Protections	180	0.74	
		Pressure	118	0.48	
		Believed had no choice	106	0.43	
		It is what you do	104	0.42	

*Note.* No statistically significant differences emerged between factors.

### Discontinuing Membership in ISEA/NEA

The fifth research question sought to address the factors that led former ISEA/NEA members to discontinue their membership with ISEA/NEA. The top five factors for discontinuing ISEA/NEA membership will be briefly explored. This will be followed up with a more in-depth analysis of the factors, which will reflect the findings from both quantitative and qualitative data gathered. The quantitative data reflects the findings from the survey utilized in this study. The qualitative data incorporates the use of quotes derived from both the focus group participants and the narrative provided by respondents in the survey comment boxes.

#### All Factors for Discontinuing ISEA/NEA Membership

Survey respondents were asked to identify all of the factors that influenced their decision to discontinue ISEA/NEA membership. Respondents could choose as many factors for discontinuing membership as applicable of sixteen options. Table 30 reflects the reasons former ISEA/NEA members discontinued their membership. Statistically significant relationships will be reported within each factor.

#### Overview of the Top 5 Factors

First, 79% of respondents cost of membership dues as the primary reason for discontinuing membership. The second factor for discontinuing membership, with 73% expressing this, was how membership dues were allocated by ISEA/NEA. Third, the political activities of ISEA/NEA ranked as a key factor for discontinuing membership. Fourth, 61% of former ISEA/NEA desired an alternative association. Lastly, 43% of



former members indicated the non-education platform that ISEA/NEA endorses was a factor in discontinuing ISEA/NEA membership.

Table 30

*Factors for Discontinuing ISEA/NEA Membership*

Reasons for Discontinuing ISEA Membership		Previous ISEA (N = 408)	Percent
1	Cost of dues too high	323	79.2
2	Allocation of dues	299	73.3
3	ISEA/NEA political activity	287	70.3
4	Alternative organization preferred	252	61.8
5	Focus on non-education related issues	177	43.4
6	Dissatisfaction with union leadership	157	38.5
7	ISEA/NEA disconnect from local needs	113	27.7
8	ISEA/NEA supports poor teachers	105	25.7
9	No longer interested in being a member	101	24.8
10	Connotation of ISEA/NEA as union	89	21.8
11	Learned membership not required	86	21.1
12	Traditional union tactics	83	20.3
13	ISEA/NEA supports status quo	75	18.4
14	Pressure to continue joining	61	15.0
15	Adversarial relationships promoted	60	14.7
16	Lack of professional resources	21	5.2

A deeper analysis of the top factors influencing the discontinuing of ISEA/NEA membership will be reported in the upcoming section. This section will draw on both quantitative and qualitative data. Additionally, besides the top five factors, other factors

that emerged as having statistically significant differences related to why former members discontinued ISEA/NEA will also be highlighted.

### Cost of Membership Dues

Notably, 79% of all former ISEA/NEA members indicated the cost of membership dues was the primary factor for discontinuing ISEA/NEA membership. Table 31 reflects the number of respondents who indicated cost of membership dues as a primary factor in discontinuing membership, as well as those who did not indicate this. Many statistically significant differences emerged through additional analysis related to longevity in education, building level, level of education attained, and political orientation.

Table 31

#### *Cost of Membership Dues as a Factor for Discontinuing Membership*

Number 1 Factor for Discontinuing ISEA/NEA Cost of Membership Dues	(N=408)	Percent
Yes, high dues was a factor for discontinuing membership	323	79.2
No, high dues was not a factor for discontinuing membership	81	20.8

Longevity in education. Length in education also proved to reflect statistical significance as it related to cost of membership dues. While 87% of those who have been in education 10 years or less indicated cost as a primary factor for membership decisions, 79% of those who have taught 11 to 20 years indicated the same. Also, 73% of teachers who had been in the field 21 or more years indicated their concern about the cost of membership as a factor to discontinue ISEA/NEA membership ( $\chi^2 = 13.16$ ,  $df = 3$ ,  $p = .004$ ).

Building level. When analyzing the cost factor by the level of building in which participants taught, 80% of pre-K/elementary educators and 81% of middle school educators indicated cost of dues was a primary factor in discontinuing membership, while 75% of high school educators indicated this to be a factor ( $\chi^2 = 11.50$ ,  $df = 3$ ,  $p = .009$ ).

Education attained. Level of education attained by respondents also reflected statistical significance when considering cost of dues as a factor for discontinuing ISEA/NEA membership. While 87% of those with Bachelor degrees indicated cost as a factor, 73% of those with Masters and 56% of those with Specialist or Doctoral degrees concurred ( $\chi^2 = 21.77$ ,  $df = 3$ ,  $p < .000$ ).

Political orientation. Political orientation reflected a statistically significant relationship related to the cost of membership dues. While 88% of liberals were inclined to cite cost of membership as the main reason for discontinuing with ISEA/NEA, 78% of moderates and 74% of conservatives shared the same reasoning ( $\chi^2 = 10.50$ ,  $df = 3$ ,  $p = .015$ ).

### Dues Allocation

The allocation of membership dues was the second largest factor of importance as it related to discontinuing membership of ISEA/NEA. Table 32 reflects the number of respondents who indicated dues allocation was a factor for discontinuing ISEA/NEA, as well as those who did not. Dues allocation created a statistically significant difference related to gender, longevity in education, level of education attained, political orientation, and political party affiliation.

Table 32

#### *Membership Dues Allocation as a Factor for Discontinuing Membership*

Number 2 Factor for Discontinuing ISEA/NEA Membership Dues Allocation	(N=408)	Percent
Yes, dues allocation was a factor for discontinuing membership	299	73.3
No, dues allocation was not a factor for discontinuing membership	109	26.7

Gender. While 80% of males indicated how dues were allocated played a part in determining their membership decisions, 70% of females concurred ( $\chi^2 = 4.47$ ,  $df = 1$ ,  $p = .034$ ).

Longevity in education. Length in the field held statistical significance as it related to the importance of dues allocation toward membership choices. Of those teaching 10 years or less, 60% indicated dues allocation as a factor for discontinuing membership. While 72% of those teaching 11 to 20 years indicated that how dues were allocated related to choice to discontinue ISEA/NEA membership, 79% of veteran teachers concurred ( $\chi^2 = 22.29$ ,  $df = 3$ ,  $p < .000$ ).

Attained education. Lastly, level of education attained reflected a statistical significance related to the concern of how membership dues were allocated. While 75% of those with master's degrees said allocation of dues was a factor, 70% of those with bachelor's degrees, and 67% of those with specialist or doctoral degrees concurred ( $\chi^2 = 10.66$ ,  $df = 3$ ,  $p = .014$ ).

Political orientation. Politically, 80% of conservatives and 71% of moderates were more inclined to be concerned with how dues were allocated. Liberals held this factor lower in priority, with only 38% indicating how dues were allocated influenced their membership choices ( $\chi^2 = 24.85$ ,  $df = 3$ ,  $p < .000$ ).

Political party alignment. While 81% of Republicans cited dues allocation as a factor for discontinuing membership, 74% of Independents and 43% of Democrats concurred ( $\chi^2 = 44.88$ ,  $df = 4$ ,  $p < .000$ ).

Reassigning dues allocations. Of the 299 respondents who chose dues allocations as a factor for discontinuing membership, they had strong beliefs as to how they felt their dues should have been spent instead. Table 33 highlights these findings. As can be seen,

national level issues and politics were last on the list for how former members would have preferred their dues be allocated.

Table 33

*Reassigning Dues Allocations*

How Dues Should Have Been Spent	Previous ISEA (N = 299)	Percent
Local level issues	231	77.0
State level issues	209	70.0
Professional development	172	58.0
Students/Families	122	41.0
National level issues	65	22.0
Politics	18	6.0

To further corroborate the quantitative findings in this study related to cost and allocation of dues, former members shared anecdotal stories. A former ISEA/NEA member said, “Dues paid to the ISEA/NEA should be used for improving the educational profession at the state and national levels, without involvement in anything outside of education. The impact, changes, and support needed to be directed from the local level with the ISEA/NEA in a supportive role to the local districts, rather than a top-down,

controlling approach.” Another said, “While I actually align pretty well politically with ISEA/NEA, I feel that the NEA dues are exorbitant and that NEA has no business supporting non-educational or political issues with member’s dues.”

Membership dues can be utilized in any number of ways. In response to dues being utilized for the ISEA/NEA platform, one educator said, “People that are members think their money is going to education, but instead maybe very little is? A little bit is going everywhere instead of a lot going in one direction.” Another reiterated this by saying, “Just like in education, you can’t do 20 things in a day and expect kids to do them well. So I see there is a big chunk [of dues allocated to] education, but there is a lot that isn’t. For an organization that is based on education, it is frustrating to me because they aren’t providing their full attention or enough attention to things that I would find important as a teacher.” Lastly another educator said, “It’s hard to do anything well if there are 362 resolutions.”

#### ISEA/NEA Political Activity

ISEA/NEA political activity was a factor in discontinuing ISEA/NEA membership on the part of 70% of the survey respondents. Specifically, respondents were asked to indicate if the ISEA/NEA political activities aligned with their beliefs and values. This lack of alignment between the political activities and former member’s perceived beliefs was cited as a key reason for discontinuing membership. Table 34 reflects the number of former members who indicated ISEA/NEA political activity was a factor in discontinuing ISEA/NEA membership, as well as those who did not. ISEA/NEA

political activity created statistically significant differences related to gender, building level, attained education, longevity in education, longevity in ISEA/NEA, political orientation, and political party affiliation.

Table 34

*Political Activity as a Factor for Discontinuing Membership*

Number 3 Factor for Discontinuing ISEA/NEA ISEA/NEA Political Activity	(N=408)	Percent
Yes, political activity was a factor for discontinuing membership	287	70.3
No, political activity was not a factor for discontinuing membership	121	29.7

Gender. While 78% of males indicated ISEA/NEA politics played a part in determining their membership decisions, 67% of females concurred ( $\chi^2 = 3.96$ ,  $df = 1$ ,  $p = .047$ ).

Building level. Of those teaching in pre-K/elementary and middle schools, 71% of both indicated political activity of the ISEA/NEA played a part in their choice to discontinue ISEA/NEA membership, while 68% of high schools educators agreed ( $\chi^2 = 11.39$ ,  $df = 3$ ,  $p = .010$ ).



Attained education. Sixty-eight percent of those with bachelor's degrees indicated ISEA/NEA political activity as a key factor to discontinue membership. While 72% of those with master's degrees indicated ISEA/NEA political activity was a primary factor for discontinuing membership, 78% of those with specialist or doctoral degrees concurred ( $\chi^2 = 12.43$ ,  $df = 3$ ,  $p = .006$ ).

Longevity in education. Length in the field reflected a statistically significant relationship to ISEA/NEA political activity toward former members' choice to discontinue membership. Of those teaching 10 years or less, 60% indicated political activity as a factor in membership decisions. While 65% of those teaching 11 to 20 years indicated that ISEA/NEA political activity influenced their decision to discontinue ISEA/NEA membership, 78% of veteran teachers concurred ( $\chi^2 = 26.32$ ,  $df = 3$ ,  $p < .000$ ).

ISEA/NEA membership longevity. As it relates to length as a member of ISEA/NEA, 70% of those who had belonged for 10 years or less indicated ISEA/NEA political activity played a role in discontinuing membership. While 64% of those that were members for 11 to 20 years indicated the ISEA/NEA politics was a chief factor in discontinuing membership, 71% of veteran teachers agreed ( $\chi^2 = 9.746$ ,  $df = 3$ ,  $p = .021$ ).

Political orientation. Politically, 87% of conservatives indicated the ISEA/NEA politics played a role in their membership choices, while 59% of moderates and 17% of liberals indicated politics as a factor for discontinuing membership ( $\chi^2 = 90.38$ ,  $df = 3$ ,  $p < .000$ ).

Political party alignment. While, 85% of Republicans and 65% of Independents indicated the ISEA/NEA politics played a role to discontinue ISEA/NEA membership, only 23% of Democrats indicated politics influenced their choice to discontinue ISEA/NEA membership ( $\chi^2 = 108.17$ ,  $df = 4$ ,  $p < .000$ ).

Degree that political activity influenced discontinuing membership. Notably, 76% of the respondents indicated NEA political activity moderately or significantly influenced their decision to discontinue membership. Table 35 indicates the degree to which political orientation and political party alignment influenced previous ISEA/NEA member's choice to discontinue membership.

Many former members acknowledged they were unaware of ISEA/NEA political activity upon joining and it was only after joining that they realized how ISEA/NEA was representing them politically. One educator said, "I was not aware of their political bent when I first joined, but soon learned they were on the opposite end of things from my views." One teacher acknowledged, "The political influence was more of the reason why I stopped my ISEA/NEA membership, not why I joined." Another said, "[ISEA/NEA] was not on 'the same page' with many of my concerns on educational and political issues. And they still are not." Lastly, another teacher said, "I knew ISEA/NEA was politically active, but I didn't realize the political activity was truly against my personal beliefs until I started paying attention."

Table 35

*Political Activity Influence on Discontinuing Membership*

Degree of Influence		No/Little		Mod/High	
Political Party Affiliation		(N)	Percent	(N)	Percent
Democrat	(N= 17)	3	17.6	14	82.4
Independent	(N = 37)	4	10.8	33	89.2
Republican	(N = 208)	5	2.4	203	97.2
Other	(N = 3)	0	0	3	100.0

Degree of Influence		No/Little		Mod/High	
Political Orientation		(N)	Percent	(N)	Percent
Liberal	(N= 4)	1	25.0	3	75.0
Moderate	(N = 54)	5	9.3	49	90.8
Conservative	(N = 194)	5	2.5	189	96.9
None	(N = 19)	1	5.3	18	94.7

*Note.* No/Little represents “No or little influence that ISEA/NEA political activity had on discontinuing ISEA/NEA membership.” Mod/high represents “Moderate or high influence that ISEA/NEA political activity had on discontinuing ISEA/NEA membership.”

*Note.* The sample size for the “No or little influence” was so small that further statistical analysis was not conducted.

As one teacher said,

At the time [of joining], political activity itself didn’t bother me so much as, one, the values supported by the political activity, and two, the great emphasis on issues that were outside of the educational profession. Over the years, I’ve come to see the political activity is the heart of the ISEA/NEA as well as the local association. The emphasis is not on what we can do for the student and the profession, although that is what you were told it would be, but rather the political power that can be wielded.

#### ISEA/NEA Political Activity That Concerned Educators

Specific aspects of ISEA/NEA political activity weighed more heavily than others to those who cited politics as a primary reason for discontinuing membership. Of the 287

respondents indicating ISEA/NEA political activity as a primary factor for discontinuing ISEA/NEA, further analysis was conducted. Respondents were asked to choose all political activity of concern to them. These findings are presented in Table 36.

Specific political activities engaged in by ISEA/NEA were analyzed and included (1) use of membership dues toward politics, (2) political candidate endorsements, (3) political party affiliation, (4) social issues, (5) resolutions and platform, and (6) organizational affiliations. Additionally, former ISEA/NEA member's responses related to ISEA/NEA's political activities are also available in the upcoming narrative.

Table 36

*Political Activity of Most Concern for Former ISEA/NEA Members*

ISEA/NEA Political Activities of Most Concern	Previous ISEA (N = 287)	Percent
Use of membership dues toward politics	252	87.8
Political candidate endorsements	220	76.7
Social issues	204	71.1
Political party affiliation	192	66.9
Resolutions and platform	140	48.8
Organizational affiliations	137	47.7

Use of membership dues toward politics. Use of membership dues toward politics was the number one political activity of most concern to former ISEA/NEA members. The perception of membership dues being used toward politics created two statistically significant differences related to longevity in education and attained education.

*Longevity in education.* While 82% of veteran educators in the field 21 years or more indicated concern for how membership dues were applied politically, 67% of those who had taught 11 to 20 years and 60% of those who were in education ten years or less concurred ( $\chi^2 = 43.08$ ,  $df = 3$ ,  $p < .000$ ).

*Attained education.* Those with master's degrees were more likely to indicate concern about dues used for political purposes with 76% indicating as such. Comparatively, those with 68% of those with bachelor's degrees and 67% of those with specialist or doctoral degrees reported concern with dues used for political purposes ( $\chi^2 = 25.98$ ,  $df = 3$ ,  $p < .000$ ).

Anecdotal stories shed more light on the concern former members had about membership dues being allocated to politics. A few teachers were conditionally supportive of dues going toward politics. One said, "I guess if they kept their political ambitions to education, but it just seems that they give all the money to [candidates]." Another said, "I do see a correlation [between politics and education]. There are [education] reform bills, so we need to weigh in on that and how funds are used. However, it should be bipartisan and shouldn't be so tipped." Another teacher said, "I don't know if in education you can stay out of politics. It is never going to happen. Even though it is a small amount of government money that goes to education as a whole. The

big thing is that some of these [non-education issues] should not be part of it. Things like abortion shouldn't be part of money given. It should be more student focused. What is best for school structures, computer, and technology.”

While a few teachers vocalized support for money going to political endeavors, many were not in favor of political activities funded by union dues. One respondent reiterated this by saying, she was frustrated that her “money was going for an educational organization that was actually going toward politics. This is my money. Well, very little of my personal money. But it is the principle of it.” Another said, “Simply put, I was not happy with ISEA, with the way they operated, but more so politically how they donated money.” Lastly, another said, “It was a concern of the cost, but not the amount as much as where it was going.”

Others indicated concern with a lack of transparency regarding expenditures of membership dues toward politics. A former member said, “I'm not going to put my money toward stuff I don't support or don't know where it is going.” Yet another educator had concerns of transparency by saying, “What I really struggled with was when I asked them ‘Where does my money go?’, they couldn't answer. I just knew I wasn't going to pay that much. Well, I have an idea where the money goes and they know where the money goes, but they just don't want to tell you.”

ISEA/NEA political candidate endorsements. Concern of ISEA/NEA endorsing specific political candidates was the number two political activity of most concern to former ISEA/NEA members. Candidate endorsements created a statistically significant difference related to political orientation and political party affiliation.

Political orientation. Conservatives were more inclined to be concerned about political candidate endorsements, as 74% indicated this was a concern. Comparatively, 45% of moderates and only 8% of liberals shared this concern.

Political party affiliation. Similarly, 70% of Republicans were more concerned about political candidate endorsements than the 54% of Independents and 19% of Democrats who shared the same concern ( $\chi^2 = 60.40$ ,  $df = 4$ ,  $p < .000$ ).

Many stories shared by former members reflect the varied feelings on ISEA/NEA candidate endorsements. Some former members are opposed to candidate endorsements in general. One teacher said, “Just in general, I don’t like my [dues] money going to any political candidate. If I want to support them I will give them money. But I don’t want someone else picking and choosing.” Yet another argued against endorsements by saying, “I don’t think it is the NEA’s place to endorse a candidate. I’m also a firm believer that these kinds of things shouldn’t come from the national level because they are so removed from the classroom.”

Some indicated the concern was not endorsements in general, but the concern that the endorsements were consistently partisan in nature. That said, one teacher justified the candidate endorsement for President Barack Obama by saying,

Back to the presidential election between Obama and Romney. Obama made very clear that he was in support of education, smaller class sizes, and Romney said they should just be teaching regardless of class size. When I think of Romney and other Republicans, I think they probably think the same way. So in that instance I can see why [ISEA/NEA] supported Obama. I want smaller classes. I don’t want 30 kids in my class. I can see how some points brought up sway more to the Democratic side.

Yet another teacher concluded, “From a political standpoint, especially presidential [candidates], it doesn’t matter what office, [Democratic candidates] know they are going to get the NEA endorsement. They can just remain silent and they know since 1976 that, ‘Hey, I know I’m going to get this endorsement’ so they really have to do little to no work for them since they are just going to get the endorsement.”

One teacher described it by saying, “I don’t believe that ‘blindly’ voting [for the] Democrats is really an attempt to work hard in the political arena. What are they doing, researching, or attempting to make better if their choice is just the Democratic Party? Education will be made better by individuals, not a certain political party.” Another teacher offered a middle of the road solution by saying,

Maybe [ISEA/NEA] should not say they are bipartisan. Instead they should just say we are going to support Democrats and here is why. We are going to support the Democrats because their viewpoint is this. Then, when the Republicans shift their viewpoint, the NEA can say we will support. They can’t claim they are bipartisan when the data [suggests otherwise].

Alignment to values and personal viewpoints was another sticking point for some educators related to candidate endorsements. One former member said, “I am giving my money to them and they are giving my money away... maybe to people who I am going to vote against. No, I don’t like that idea.” Another respondent followed this line of thinking by saying, “Then I wondered why I was giving my money to someone who was going to vote against what I was voting for.”

Another teacher said, “[ISEA/NEA] political activity was actually what led my decision to leave. I looked at who they recommended and I [was voting] for the opposite candidate.” A teacher who was a member of ISEA/NEA for many years said, “In most



elections, the ISEA/NEA rarely endorsed a candidate I supported.” Yet, another teacher said, “I did not like the candidates that they supported for certain offices.” Lastly, one teacher recounted a time of frustration related to political candidate endorsements by saying, “Seeing [candidate X] on the cover the NEA Monthly was a little too much to take. I vote for the best person, not what candidate NEA endorses.”

Lastly, the concern about political candidate endorsements came down to choice. One teacher said bluntly, “Don’t tell me who to vote for.” Another teacher asserted, “I don’t like being told who I should vote for...that is my decision. One can provide me the information I need to make an informed decision, but do not think you can make that decision for me with strong arm tactics.” One teacher tied it back to the classroom and said, “It is similar to what we as teachers are taught not to do in the classroom- not to push our political agenda, push a religion, push an agenda. Then if this is just an educational association, then we as their workers shouldn’t be pushed [one way or the other].”

Social issues supported by ISEA/NEA. The third concern among political activities for those who discontinued ISEA/NEA membership related to the social issues supported by ISEA/NEA. Social issues may directly or indirectly relate to education. A few examples of the many social issues in which ISEA/NEA takes a stance include health care, climate change, immigration, and family planning. Concern of social issues created a statistically significant difference related to political orientation and political party affiliation.

*Political orientation.* While 76% of conservatives were more concerned with the social issues ISEA/NEA promoted, 32% of moderates and 13% of liberals agreed ( $\chi^2 = 103.15$ ,  $df = 3$ ,  $p < .000$ ).

*Political party affiliation.* Similarly, 69% of Republicans were more inclined to express concern about social issues, while 44% of Independents and 16% Democrats believed social issues were a primary concern ( $\chi^2 = 80.35$ ,  $df = 4$ ,  $p < .000$ ).

While some study respondents indicated support for ISEA/NEA social issues that could indirectly impact student education, many respondents did not. As one teacher said, “The ISEA/NEA political activity around social issues did not align with my religious beliefs.” Another reiterated, “I disagreed with how NEA was spending my dues on issues that I was morally opposed to.” This teacher expressed concern when saying, “The more I learned about the political activities of the ISEA/NEA, the more uncomfortable I became being part of the organization. The tenets of the union do not, in any meaningful way, align with my personal values.” Lastly, another teacher reiterated these sentiments, “My main reason for discontinuing membership was that I did not want my dues going to political activities that I could not morally or ethically support.”

The most prominent social issue to rise to the top of concerns for many former members related to abortion, or reproductive freedom as NEA refers to it. One teacher said, “I did not like that ISEA/NEA supports pro-choice beliefs.” Another teacher said, “The last straw was when I heard that the NEA was helping support a large pro-abortion rally in Washington, DC. I felt I could no longer allow my dues to back something that was against my beliefs.” Yet another said, “The pro-life platform is very important to me.

There were too many candidates that were getting money from ISEA/NEA that were not pro-life.” One teacher said, “The fact that ISEA/NEA supports Planned Parenthood is confusing because I think that a teacher’s organization should be about the protection of future generations.” Lastly, another teacher said, “I stated that if it looked like the NEA was going to stop supporting pro-abortion organizations, I would resume being a member.”

ISEA/NEA political party affiliation. The fourth area of concern related to political activity was related to the tie to the Democratic Party. Political orientation and political party alignment reflected statistically significant differences related to ISEA/NEA political party affiliation.

*Political orientation.* While 71% of conservatives were more inclined to be concerned about political party affiliation, only 29% of moderates and no liberals agreed ( $\chi^2 = 94.93$ ,  $df = 3$ ,  $p < .000$ ).

*Political party affiliation.* Similarly, 65% of Republicans expressed concern about political party affiliations, while 47% of Independents and 8% of Democrats concurred ( $\chi^2 = 78.47$ ,  $df = 4$ ,  $p < .000$ ).

One teacher summed it up by saying, “It should be based on what’s best for the kids, not what’s best [for] the pocket book of the NEA and the Democratic Party.”

ISEA/NEA resolutions and platform. Tied closely to social issues are the ISEA/NEA resolutions and platform stances. Some of these may be social issues in nature, but others relate to politics, labor advocacy, or public education. Resolutions and platforms created one statistically significance difference related to gender.

*Gender.* While 45% of males expressed a concern about ISEA/NEA resolutions and platforms, 32% of females indicated this was a concern politically ( $\chi^2 = 5.26$ ,  $df = 1$ ,  $p = .022$ ).

These findings were corroborated by additional thoughts shared by study participants. One educator shared, “It did not take long, after reading a few of the monthly publications from the organization, to realize that I was philosophically, morally, theologically, and ethically on another page than they were. Under the facade and context of education, I found a worldview for which I was diametrically opposed.” Another said, “When I joined in my first year, it was more because it was ‘just what you do’. That’s the message I got from my mentor teacher. When my husband started looking into some of the political views of the ISEA/NEA, and saw that we didn’t agree with them... we made the switch that next year [away from ISEA/NEA].”

ISEA/NEA organizational affiliations. The concern of organizational affiliations is centered on the partnerships, associations, and collaboration with and among many organizations that appear to have a particular political bent. The ISEA/NEA organizational affiliations created statistically significant differences related to political orientation.

*Political orientation.* Politically, 49% of conservatives were more inclined to be concerned with ISEA/NEA organizational affiliates, as compared to 20% of moderates and zero liberals ( $\chi^2 = 48.76$ ,  $df = 3$ ,  $p < .000$ ).

Many former members were unaware of the tie between ISEA/NEA and the organizations they affiliate themselves with. One teacher confessed, “I absolutely did not

knowingly want my money going to support a certain organization that supports a certain social issue.” But another said it was the impetus she needed to quit ISEA/NEA by saying, “I soon realized after joining that ISEA was not for me due to political stances. The final deciding factor was when I attended an officers meeting and they voted on whether to give money to a group that had alternative beliefs to mine. I was so furious I couldn’t think straight and promptly quit.”

#### Alternative Association

The fourth factor in discontinuing membership centered on the idea of choice for educators. Former members desired options as it related to membership choices to professional organizations. Notably, 62% of respondents desired an alternative professional organization and cited it as a reason for discontinuing membership with ISEA/NEA. Table 37 reflects the number of respondents who indicated an alternative association was a factor in discontinuing ISEA/NEA relationship, as well as those who did not. The desire for an alternative association created a statistically significant difference related to gender and building level.

Gender. While 65% of females indicated their desire for an alternative was a primary factor in discontinuing ISEA/NEA membership, 50% of males agreed ( $\chi^2 = 7.99$ ,  $df = 1$ ,  $p = .005$ ).

Building level. When analyzed by building level, a statistically significant relationship emerged. While 64% of pre-K/elementary educators and 65% of high school

educators indicated having an alternative was a factor in their discontinuation of ISEA/NEA membership, 53% of middle school educators concurred ( $\chi^2 = 10.29$ ,  $df = 3$ ,  $p = .016$ ).

Table 37

*An Alternative Association as a Factor for Discontinuing Membership*

Number 4 Factor for Discontinuing ISEA/NEA Alternative Association Desired	(N=408)	Percent
Yes, an alternative association was a factor for discontinuing membership	252	61.8
No, an alternative association was not a factor for discontinuing membership	156	38.2

A former ISEA/NEA member reiterated the importance of choice by saying, “I had been asked more about what my thoughts or attitudes were for the state level issues [as a PEI member], than I ever was as a member of local/ISEA/NEA.”

Non-Education Issue Focus

The fifth factor for former members to discontinue ISEA/NEA membership was the perception of ISEA/NEA’s focus on non-educational issues, or those issues that are not directly tied to the classroom. Notably, 43% of the survey respondents indicated this was a concern. Table 38 reflects the number of respondents who indicated the focus on

non-education issues was a factor in discontinuing ISEA/NEA membership, as well as those who did not. The focus on non-education issues created a statistical significance related to longevity in education, level of education attained, political orientation, and political party affiliation.

Table 38

*Issues Unrelated to Education as a Factor for Discontinuing Membership*

Number 5 Factor for Discontinuing ISEA/NEA Focus on Issues Unrelated to Education	(N=408)	Percent
Yes, focus on non-education issues was a factor for discontinuing membership	177	43.4
No, focus on non-education issues was not a factor for discontinuing membership	231	56.6

Longevity in education. Length in the field revealed a statistically significant relationship as it relates to the perception of ISEA/NEA's focus on non-education issues. While 55% of veteran teachers indicated the focus of non-education issues was a factor in discontinuing ISEA/NEA membership, 38% of those teaching 11 to 20 years and 25% of those teaching 10 years or less agreed ( $\chi^2 = 27.79$ ,  $df = 3$ ,  $p < .000$ ).

Attained education. Additionally, 48% of those with master's degrees were more likely to see ISEA/NEA's focus on non-education issues as a factor for discontinuing membership. Additionally, 37% of those with bachelor's degrees and 33% of those with

specialist or doctoral degrees concurred that the focus on non-education issues influenced their decision to discontinue ISEA/NEA membership ( $\chi^2 = 9.20$ ,  $df = 3$ ,  $p = .027$ ).

Political orientation. While 50% of conservatives were most likely to have concern about the focus on non-education issues, 30% of moderates agreed that it influenced their decision to discontinue ISEA/NEA. Liberals were least concerned about a focus on non-education issues with 17% indicating it was a factor in their membership choices ( $\chi^2 = 30.01$ ,  $df = 3$ ,  $p < .000$ ).

Political party alignment. Similarly, 50% of Republicans were most likely to have concern about the focus on non-education issues, while 46% of Independents and 18% of Democrats indicated it was a factor in their membership choices ( $\chi^2 = 27.09$ ,  $df = 4$ ,  $p < .000$ ).

Strong anecdotal sentiments were shared to corroborate the perceptions surrounding ISEA/NEA's focus on non-education issues. That said, some educators believed it may be necessary to use membership dues to support non-education issues. One teacher remarked, "Directly tied' can be a gray area. I would consider, hungry, homeless kids a reasonable tie to education." But another teacher had a different take on this issue and provided a different rationale for ISEA/NEA supporting issues not directly tied to the classroom. She said, "I believe it is [ISEA/NEA's] right to do so."

Some were not as easily convinced, but were slightly open to ISEA/NEA's focus on non-education issues. As one teacher said, "Yeah, some of those [issues] are kind of tangential to education, maybe on the outer edges of education. But most of this has nothing to do with teachers, kids learning, how to better education, improving teaching,



improving schools.” Yet another said, “I could see a rare exception, but ONLY when it directly affects the health, mental or physical, of students, thereby affecting their ability to learn.” Another said, “Rarely, but there may be an issue from time to time when it may be appropriate, but it needs to be a rare exception.”

Others had more of a stronger view on the non-education issue focus taken by ISEA/NEA. One teacher said the focus should be on “student learning. As in supporting teachers to be the best they can be for the students.” Another teacher said, “I felt like dues were not going toward education, but to causes I didn’t support.” Lastly, one teacher said, “I believe an education organization should not be involved in politics other than [related to] education. I may even agree with some of the ideas promoted by the NEA, but I do not think that they should be connected to non-education policies.”

As one teacher put it, “I think [ISEA/NEA] has a much broader agenda than just supporting teachers and bargaining for teachers. There is no reason for them to put out statements about reproductive rights, Hawaiian land ownership, Italian born immigrants, and nuclear facilities. I mean there is no reason that an association [that is] supposed to be for education, makes any statements about these particular issues. That doesn’t make any sense to me. It’s baffling.” Lastly, another teacher said, “As a Democrat, I believe, I support a lot of these things. However, professionally, if I am giving my money to education, I want it to go to education. If I feel strongly about Hawaiian land ownership, which I’m sure I do, I will donate to a private cause. They are throwing everything into a basket and it has to be separated.”

### Top Four Factors by Demographic

Further analysis was conducted to determine the top four factors by gender and political leanings. As a reminder, respondents could choose as many factors as applied from a list of 16. The top four factors for discontinuing membership are highlighted for three of the subgroups in Table 39.

### Additional Factors Influencing the Choice to Discontinue ISEA/NEA Membership

Although not in the top five factors for discontinuing ISEA/NEA membership, the quantitative and qualitative data collected and analyzed suggested the following areas were worthy of discussion. These factors included: (1) dissatisfaction with ISEA/NEA leadership, (2) protection of poor teachers, (3) connotation of labor union, (4) protection of the status quo, and (5) joining the local.

### ISEA/NEA Leadership Dissatisfaction

The dissatisfaction with ISEA/NEA leadership was a factor for 38% of members who discontinued membership. Although not specified by respondents, dissatisfaction may be reflected about the local, state, or national level leadership. Table 40 reflects the number of respondents who indicated dissatisfaction with ISEA/NEA leadership was a factor in discontinuing membership, as well as those that did not. Dissatisfaction with ISEA/NEA leadership created statistically significant differences related to gender, longevity of ISEA/NEA membership, and political orientation.

Table 39

*Top Four Factors for Discontinuing Membership by Demographic*

Top 4 Factors by Demographic			Frequency (N = 408)	Percent	
Gender	Male	Allocation of dues	86	80.4	
		Cost of dues	84	78.5	
		ISEA/NEA politics	83	77.6	
		Non-education issues	53	49.5	
	Female	Cost of dues	224	78.0	
		Allocation of dues	200	69.7	
		ISEA/NEA politics	193	67.2	
		Alternative organization	187	65.2	
Political Orientation	Liberals	Cost of dues	21	87.5	
		Alternative organization	15	62.5	
		Allocation of dues	9	37.5	
		ISEA/NEA leadership	7	29.2	
		ISEA/NEA disconnect local	7	29.2	
	Moderates	Cost of dues	71	78.0	
		Allocation of dues	65	71.4	
		ISEA/NEA politics	54	59.3	
		Alternative organization	51	56.0	
	Conservatives	ISEA/NEA politics	195	87.4	
		Allocation of dues	178	79.8	
		Cost of dues	164	73.5	
		Alternative organization	142	63.7	
	Political Party Affiliation	Democrats	Cost of dues	62	84.9
			Alternative organization	39	53.4
			Allocation of dues	31	42.5
ISEA/NEA leadership			27	37.0	
Independents		Cost of dues	43	75.4	
		Allocation of dues	42	73.7	
		ISEA/NEA politics	37	64.9	
		Alternative organization	32	56.1	
Republicans		ISEA/NEA politics	209	85.3	
		Allocation of dues	198	80.8	
		Cost of dues	185	75.5	
		Alternative organization	155	63.3	

*Note.* No statistically significant differences emerged between factors.

Gender. When analyzed by gender, 49% of males expressed dissatisfaction with the ISEA/NEA leaders as a factor for discontinuing membership, while 33% of females shared the same concern ( $\chi^2 = 8.00$ ,  $df = 1$ ,  $p = .005$ ).

ISEA/NEA membership. Longevity in ISEA/NEA reflected one statistically significant relationship. While 79% of veteran teachers indicated union leadership as a factor for discontinuing membership, those who had been members for 10 years or less or between 11 and 20 years reflected similar rates of dissatisfaction with ISEA/NEA leaders of 36% and 37% respectively ( $\chi^2 = 10.88$ ,  $df = 3$ ,  $p = .012$ ).

Table 40

*Dissatisfaction with Leadership as a Factor for Discontinuing ISEA/NEA*

Number 6 Factor for Discontinuing ISEA/NEA Dissatisfaction with ISEA/NEA leadership	(N=408)	Percent
Yes, leadership dissatisfaction was a factor for discontinuing membership	157	38.5
No, leadership dissatisfaction was not a factor for discontinuing membership	251	61.5

Political orientation. When examined by political orientation, 48% of moderates were most likely to express dissatisfaction with ISEA/NEA leaders and cite that as a reason for discontinuing membership, while 36% of conservatives and 29% liberals reported the same factor ( $\chi^2 = 8.30$ ,  $df = 3$ ,  $p = .040$ ).

Anecdotal stories further validated the concerns former members had about ISEA/NEA leaders. In terms of local leadership, one teacher said, “I joined when I was a new teacher, but left after I realized that the local [leaders] in control did not listen to anyone else.” Another teacher shared concern about local leaders, when saying, “Local leadership would portray beliefs to be held by all staff members, which were not true. They also were encouraging members to be disrespectful of administration.” Another said, “Our local union [leaders] did not listen to the majority of the members on an issue. The officers did what they felt was the right decision after a vote among members. The majority vote did not support what the president wanted.” Another respondent shared, “I was very dissatisfied in how some members were given much attention while others not in the “group” were not listened to [by leaders].

A host of other concerns were brought up about leadership as well. One former ISEA/NEA member reported, “In negotiations, my ISEA representation only negotiated for the teachers who had been teaching for awhile. They weren’t concerned with keeping the young teachers at the time.”

Another teacher expressed frustration about the perks of union leadership by saying, “When I hear an ISEA person bragging about that teachers were paying for their

car...hmmm.” He went on to say, “The big-wig was using teacher’s money to pay for their car.” Another veteran educator concurred with this sentiment by saying,

I became disenchanted because of ISEA/NEA’s concerns with the trappings of leadership positions at all levels, for example, going to conventions, cheese and wine parties, and not dealing effectively with local issues. I quit the local and state unions although already committed to lifetime member of NEA, and was threatened with loss of lifetime membership and frankly did not care that they ultimately cancelled my costly lifetime membership due to my lack of response to local intimidation. I felt more empowered speaking out on my own than trying to go through any union level, which were all heading in the wrong direction in the first place.

### Protection of Poor Teachers

One of the hallmarks of a union is the protections and rights of its workers. However, much concern lingers among respondents over the perceived practice of protecting poor teachers. The concern that ISEA/NEA protects poor teachers ranked 8<sup>th</sup> as a factor for discontinuing membership and resonated with a quarter of former ISEA/NEA members. Table 41 reflects the number of respondents who indicated protection of poor teachers was a factor in discontinuing ISEA/NEA membership. Protection of poor teachers created a statistically significant difference related to longevity in education, attained education, political orientation, and political party affiliation.

Table 41

*Protection of Poor Teachers as a Factor for Discontinuing Membership*

Number 8 Factor for Discontinuing ISEA/NEA Protection of Poor Teachers	(N=408)	Percent
Yes, protection of poor teachers was a factor for discontinuing membership	105	25.7
No, protection of poor teachers was not a factor for discontinuing membership	303	74.3

Longevity in education. Length in the field revealed a statistically significant relationship as it relates to ISEA/NEA's protection of poor teachers. While 31% of veteran teachers indicated the protection of poor teachers was a factor in discontinuing ISEA/NEA membership, 24% of those teaching 11 to 20 years and 18% of those teaching 10 years or less agreed ( $\chi^2 = 9.78$ ,  $df = 3$ ,  $p = .021$ ).

Attained education. Additionally, 17% of those with bachelor's degrees were concerned about the protection of poor teachers as a factor for discontinuing membership. Comparatively, 31% of those with master's degrees and 56% of those with specialist or doctoral degrees cited the protection of poor teachers as a factor for discontinuing membership ( $\chi^2 = 18.04$ ,  $df = 3$ ,  $p < .000$ ).

Political orientation. While 32% of conservatives indicated protection of poor teachers as a factor for discontinuing membership, 23% of moderates and 4% of liberals cited the protection of poor teachers as a factor for discontinuing membership ( $\chi^2 = 12.19$ ,  $df = 3$ ,  $p = .007$ ).

Political party alignment. Similarly, 31% of Republicans were inclined to cite protection of poor teachers as a factor in discontinuing membership, while 27% of Independents and 6% of Democrats cited protection of poor teachers as a factor for discontinuing membership ( $\chi^2 = 22.73$ ,  $df = 4$ ,  $p < .000$ ).

Many study respondents shared stories related to the protections of poor teachers. One teacher said, “[ISEA/NEA] is about poor teacher protection, not about protecting students from poor teachers.” Another said, “My experience has been to see people who want to keep the status quo in leadership positions. Teachers who are poor in quality have been able to continue to do as they please, essentially cheating students out of a quality education.” Another teacher said, “I feel that the union, at all levels, including the local, is most concerned with teachers doing the least amount of work for the most amount of pay, rather than a fair salary for quality work and keeping in mind what’s best for students.”

To reiterate these sentiments, another teacher said, “There needs to be a willingness to promote what is best for kids. If I see someone giving a worksheet from 15 years ago that I had as a student, the learning may be relevant, but there may be a newer way to teach that is relevant for kids. We need to be willing to take those steps forward as educators. That teacher that is unwilling to change is the one that is relying on the union.” Lastly, another said, “[ISEA/NEA] hurts the cause of education, because they protect people who don’t do their job. I’ve seen it first-hand.” One educator cited frustration around the protection of poor teachers when she recalled,



Our local union covered the court cost of a coach who was fired. He was also a teacher, but was only fired from his coaching duties. If it is a teacher's union and the opportunity is offered to other school employees [and] they are not teachers, why is the teacher's union fighting a coaching battle? This whole situation left a sour taste in several people's mouths as the case when through many levels of the courts and lots of money was lost. Many people left [the union] after that year.

### Labor Union Connotation

Of all former members, 22% indicated connotation of ISEA/NEA as a union was a factor in discontinuing membership. Table 42 reflects the number of respondents who indicated the connotation of a labor union was a factor in discontinuing ISEA/NEA membership, as well as those who did not. The connotation of a union as a factor for discontinuing membership reflected statistical significance as it related to political leanings and political party affiliation.

Table 42

#### *Labor Union Connotation as a Factor for Discontinuing Membership*

Number 10 Factor for Discontinuing ISEA/NEA Labor Union Connotation	(N=408)	Percent
Yes, connotation of a labor union was a factor for discontinuing membership	89	21.8
No, connotation of a labor union was not a factor for discontinuing membership	319	78.2

Political orientation. While 28% of conservatives and 18% of moderates indicated that union connotation was a factor in their decision to discontinue membership with ISEA, zero liberals cited this as a factor ( $\chi^2 = 16.51$ ,  $df = 3$ ,  $p = .001$ ).

Political party affiliation. Similarly, 27% of Republicans and 18% of Independents reported that the connotation of a union was a factor for discontinuing membership, while only 6% of Democrats cited this as a factor ( $\chi^2 = 15.51$ ,  $df = 4$ ,  $p = .004$ ).

Union or professional association. Additionally, of the 89 respondents who chose union connotation as a factor for discontinuing membership, 96% identified ISEA/NEA as a union.

Many respondents indicated that while ISEA/NEA promotes themselves as a professional association, they act more like a union that is “more protection oriented.” One respondent said, “It’s not a question, ISEA/NEA is a union. They fought for collective bargaining and all this stuff. There is a gang mentality that we are all marching in step together. ” One of the focus group participants followed up by saying, “It is interesting that in some respects [ISEA/NEA] wants [education] to be a profession, but they act like the UAW.”

For some, the notion of a union clashed with the ideal of belonging to a professional association. A former ISEA/NEA member said, “I wanted to be part of a professional organization. [PEI] is not a union. We [as educators] are professionals. Do the dentists have a union? No, they have the ADA. Do the doctors have a union? No, they have the AMA. So, that is what I was looking for and that to me is what PEI was like.

More like AMA.” One teacher said, “I didn’t want to belong to a union, or any group that claimed to be a professional organization, but did not listen to its members.”

Another teacher said, “To me an association means that you gather for activities beyond the negotiation of the contract. The sole purpose of ours at the local level is contract negotiation and enforcement [of the contract].” One former member recalled her experience as the chief negotiator for the local union by saying, “We settled early and in an agreeable manner. The ISEA reamed me for doing so, saying I ruined it for all other schools in the area. Their agenda clearly did not line up with my beliefs and values. I have never regretted leaving.” Lastly, another focus group member recalled,

I got put on a negotiating committee and was the representative for one of the elementaries. They took a poll about what everyone wanted. They want this, that, this. So I go in and the superintendent and a few principals say almost exactly what the union was asking for. I’m thinking this sounds pretty cool. So we got back into our private session and a couple of these old union guys were like, ‘He doesn’t dictate to us what we get.’ I say, ‘Hey, I don’t get what’s going on because basically he laid out about what we wanted.’ They said, ‘Listen you are young, just watch.’ They were looking to have a fight about it. They were about this far apart and they came back in and... created this divisive issue that created animosity that pervades this whole system.

Within the confines of union connotation, concern of adversarial relationships promoted by ISEA/NEA with district officials was bothersome to former members. One teacher mentioned, “I am starting to notice the ‘us versus them’ mentality more. Teachers versus administration. ‘They can’t do that because’... the kids get lost in the shuffle. What is the best thing for the kids... forget about everything else. That’s just not an effective organization in my mind.” Personally, I don’t feel like it is us against them when it comes to my district administration and school board.” Lastly, another teacher said, “[ISEA/NEA] has an ‘us versus them’ mentality that creates division among

professionals and doesn't ever get at the heart of solving the tough problems we face as educators today.”

### Perception of Status Quo

Tied to the perception of protection for poor teachers, is the perception that ISEA/NEA supports the status quo in public education. Of former ISEA/NEA members, 18% indicated that the perception of ISEA/NEA supporting the status quo in public education was indeed a factor for discontinuing membership. Table 43 reflects the number of respondents who indicated support of the status quo was a factor for discontinuing ISEA/NEA, as well as those who did not. The perception of status quo created statistically significant differences among gender, district size, and attained education.

Table 43

#### *Perception of Status Quo as a Factor for Discontinuing Membership*

Number	Percent
13 Factor for Discontinuing ISEA/NEA Support of the Status Quo	(N=408)
Yes, perception of status quo was a factor for discontinuing membership	75 18.4
No, perception of status quo was not a factor for discontinuing membership	333 81.6

Gender. While 26% of males indicated ISEA/NEA supporting the status quo was a factor in discontinuing membership, 15% of females agreed with that sentiment ( $\chi^2 = 6.13$ ,  $df = 1$ ,  $p = .013$ ).

District size. While 32% of educators in urban districts indicated status quo as a factor for discontinuing membership, 19% of those in suburban districts and 14% in rural districts cited this as a factor to discontinue membership ( $\chi^2 = 9.14$ ,  $df = 2$ ,  $p = .010$ ).

Attained education. Lastly, 33% of those with specialist or doctoral degrees indicated status quo as a factor for discontinuing membership, while 23% of those with master's degrees and 12% of those with bachelor's degrees concurred ( $\chi^2 = 10.48$ ,  $df = 3$ ,  $p = .015$ ).

Status quo or advancing public education. To dig deeper into this status quo perception of former members, study respondents were later asked to identify if they believed ISEA/NEA promoted the status quo in public education or advanced public education in an effective way for students. Notably, 51% of respondents indicated they believed ISEA/NEA fostered the status quo, while 47% believed ISEA/NEA was balancing the status quo and advancing education. Interestingly, only 2% reported that ISEA/NEA advanced education in a positive manner for students ( $\chi^2 = 7.69$ ,  $df = 3$ ,  $p = .053$ ).

#### Educator or Student-First Organization

Tied to the idea of ISEA/NEA supporting the status quo in education is the perception of ISEA/NEA as an “educator-first” or “student-first” organization. This

reflects the perception of where ISEA/NEA most directs its energies and aim to benefit-educators or students. When former members were asked to identify whether ISEA/NEA was an educator or student-first organization, 68% reported ISEA/NEA was an educator-first organization, while 31% indicated it struck a balance between educators and students. Most notable, is that only 1% indicated ISEA/NEA was a student-first organization. Also of importance to reflect on is the comparison of perceptions about status quo and whether ISEA/NEA is educators or student oriented. Table 44 reflects the intersection of these two variables.

Table 44

*Perceptions of Status Quo and Educators-First Focus*

ISEA/NEA Focus	Degree to which ISEA/NEA Advances Education (N)	Maintain Status Quo		Balance b/t Status quo and Advance Education		Advance Education	
		N	Percent	N	Percent	N	Percent
Educators Frst	(N=259)	180	69.0	75	29.0	4	2.0
Balance Educators/students	(N= 119)	14	12.0	103	87.0	2	1.0
Students First	(N = 5)	3	60.0	1	20.0	1	20.0

Former members expressed concerned about the perception of status quo. As one teacher said, “The most significant reason for my disassociation from ISEA was that the organization was an obstacle to genuine improvement in teaching and learning, when it should have been promoting innovations that could potentially improve our schools. The ISEA was more concerned about power, money, and non-educational social/political causes.” Another said, “I thought at the time ISEA/NEA might be able to improve the teaching profession, but now I know better.” One teacher painted the picture like this,

[ISEA/NEA is] really focused on themselves more than the kids. I’m really focused on the kids and they are not always doing what is best for kids. I don’t want to be part of a group that is not doing what is best for kids. So that is when it was like, ‘I’m out of here.’” Another said, “I think [unions] hurt education. They are no longer fighting for children- they are fighting for teachers. Or not even teachers... it sounds like it is something completely unrelated to education. There is nothing going on that is helping students. I think it is showing in education, production, and success rate that public schools are having right now. The NEA has had a huge effect on that- the lack of focus on the product of students.

A female teacher reaffirmed, “The political stand of NEA has led ISEA to cease being a teacher’s organization [that] helps students and has become a labor union organization, only concerned with the salary and benefits for the teachers. Not really interested in the student learning and help.” Yet another former ISEA/NEA members said, “I felt like I was supporting a group that would do anything to hold back a parents’ right to choice on how to educate their children- public, private, or at home.” Lastly, another former teacher said, “From what I perceive, the ISEA exists solely to benefit the teacher. Most teachers are not in the vocation for the money, but being part of the union shows that their interests are based solely on themselves.”

### Join Local Only

Although this was not an option in the factors that respondents could choose from as it related to discontinuing ISEA/NEA, the option of joining the local only emerged as a significant trend. If given a chance, 47% of former ISEA/NEA members would have continued membership as part of the local union, however 53% indicated they would have not reconsidered membership under any circumstance.

The interest in joining the local appeared to be an appealing option for some, but was not a viable alternative due to the unified dues policy. Under such a policy, members interested in joining the local, must also join the state and national levels. One teacher remarked on the unified dues policy when she said, “I understood that the local was compelled to enforce the unified dues policy... the NEA and possibly the ISEA, would have died if members would have had a choice as to which segments they could belong.” Another said, “When I asked, my local union rep told me that that was not an option allowed by the NEA...I regretted not helping my local union, especially when difficult issues arose, but I tried to support my colleagues, staff, and schools in other ways.” One teacher said, “I would consider [joining the local] more. I would be interested more if the money and issues were based locally rather than nationally.” Another indicated, “I would have liked to be part of policy-making at the district level.”

Of those who would have considered continuing membership if allowed to only join a local affiliate, 63% inquired about the possibility, while 37% did not inquire ( $\chi^2 = 67.061$ ,  $df = 1$ ,  $p < .000$ ). When one teacher inquired about joining the local, she was told she “had to join all or none.” Another said,



I would join just my local union if I could so without joining ISEA or NEA, or possibly even if I could just avoid joining NEA. I do believe in supporting the work of my colleagues in our local union for contract negotiations, and ISEA at least supports educational issues at the state level where there is a chance of making a positive difference. Supporting educational issues at a national level is rather ineffective since education is largely a state-controlled or local controlled matter in this country.

Some former members who expressed interest in joining the local, reported feeling an obligation to do so. One teacher said, “I would have joined only because I feel bad not supporting the folks that negotiate my contracts- they volunteer their time.” To offset the costs of local dues, some teachers went as far as trying to pay or donate money to represent their intentions behind supporting the local, even though joining was not an option. One teacher recalled, “I offered to pay the local dues just to be polite. Of course, they refused my offer. As I learned more about NEA, I quit offering.” Another teacher shared, “I even wrote a check in the amount of the local dues and offered it to the local organization to support their efforts locally, but the check was returned, at two different systems during my career.” One local PEI chapter even offered to provide money for food during the negotiations, but the check set uncashed for two years, so they discontinued the practice.”

Another teacher had a more positive experience supporting the local as a non-member by saying, “I still give my local group a ‘donation’ as appreciation for what they do to negotiate a master contract for the entire teaching staff.” Another teacher said, “I actually paid dues (\$25/year) to my local teachers’ union and supported our local efforts while a member of PEI, [although] I had no official papers saying that I was a part of the local teachers’ union.” Yet another had both a positive and negative experience with

giving when she shared, “When I [worked in one district], I donated the cost that the local union would have received from my dues. When I inquired about doing the same thing when I came to a [different district], I was told that they did not want my money.”

Another teacher said, “They continually tell us that we can’t [join the local only], but they have cashed checks at the end of the school year from several teachers who wanted to let them know they supported them locally.” One teacher explained how she supported the local,

I actually ‘donate’ money to my local union each [year] to be used toward their annual scholarship fund. The money goes to a local graduate who plans on majoring in education in college. The amount I donate is the difference between what I pay in PEI dues and what I would have paid to be a regular union member. I think last year, I wrote them a check for \$500. They are not allowed to funnel any of this donation to the NEA or ISEA. I have done this every year since I left ISEA/NEA in 2004. The reason I do this is to show the local association that I did not leave ISEA/NEA to get out of paying dues, but because of their political and social issues that I do not believe in. They probably think I’m crazy, but they have never returned my check.

Yet, some teachers acknowledge that even if allowed to join the local, they would eventually discontinue membership. One teacher acknowledged that if she could have joined only the local, “I would have stayed with the local for a while, until I became aware of all of the non-educational agenda matters with which the union was involved, and the social-political positions the union held, almost completely opposite of the ones I hold.” Another teacher reiterated this when saying, “I would have preferred joining only the local and helped work within the district. However, it didn’t take long to see that the local association was simply a local extension of the ISEA/NEA. Had I been a member of the local, I would have eventually dropped out.” Another teacher said, “If efforts to work

on local and Iowa issues, for example, insurance costs, encouraging quality education efforts instead of covering for marginal or weak efforts, would have been the focus, I might have felt the costs were worth it.”

### Emotions

Former members were asked about the emotions they felt as a result of joining and/or discontinuing membership with ISEA/NEA. Survey respondents were asked to identify all of the emotions that applied to their membership choice as possible. It is important to note that some former members remarked that they did not have any emotions at all tied to their membership. One teacher said, “As I became aware of the political and social issues ISEA/NEA supported, it was an easy choice not to join. It was not emotional, it was a logical choice.” Another teacher reiterated this sentiment when saying, “I didn’t really feel any emotion. I didn’t agree with their views, so I joined something I agree with more. It was more of a statement of fact than emotion.”

Yet others noted they did feel a variety of emotions. One teacher deeply rooted in her faith said, “I felt only slight guilt because I got out when I found out what the union represented. I also felt anger, embarrassment, disappointment, and fear because to me the union is acting in opposition to the Constitution and the traditional and Christian values of our founding fathers.” Another felt an array of emotions for different reasons. “When I did join, I felt I had no choice and was pressured to do so, so yes, I felt frustrated and angry,” she said. She went on to say, “I also felt guilty and embarrassed that my money was being spent on things I didn’t agree with. When I discontinued my membership, there were times I was fearful of being verbally attacked and harassed by other teachers.”

Another teacher said, “My discontinuation of ISEA/NEA was because of disappointment and frustration and anger.” Table 45 reflects the emotions felt in order of most to least common among former members.

Frustration. The overwhelming emotion related to former ISEA/NEA membership was frustration, which was reported by 58% of former members. Frustration created one statistically significant difference based on longevity in education.

*Longevity in education.* While 56% of those serving as an educator for 11 to 20 years felt the most frustration, 42% of those teaching 10 years or less and 38% of veteran teachers reported frustration ( $\chi^2 = 9.13$ ,  $df = 3$ ,  $p = .028$ ).

Table 45

*Emotions Former Members Experienced*

Emotions Experienced Related to Membership Choices	Previous ISEA (N = 321)	Percent
Frustration	186	57.9
Disappointment	178	55.5
Guilt	127	39.6
Anger	116	36.1
Embarrassment	85	26.5
Surprise	56	17.5
Fear	39	12.2

One teacher recalled the reason behind her frustration by saying, “ISEA wasn’t honest with me when I asked if they give money to Planned Parenthood.” Another said, “I sometimes felt frustrated because I [didn’t] find things out in a timely manner. I was unable to find out what my salary had been negotiated as for the coming year, until the year had already started.” One more former member said her frustration stemmed from, “the exclusiveness of the teachers’ association at our school.”

Disappointment. Disappointment was the second most common emotion tied to ISEA/NEA membership, with 55% of respondents reflecting this emotion. Disappointment created statistically significant differences related to longevity in education and attained education.

*Longevity in education.* While 52% of those teaching 11 to 20 years felt the most disappointment, 42% of those teaching 10 years or less and 33% those teaching 21 years or more reported disappointment ( $\chi^2 = 10.46$ ,  $df = 3$ ,  $p = .015$ ).

*Attained education.* Also, statistical significance emerged related to education attained by former members. While 48% of those with master’s degrees reported disappointment, 44% of those with specialist or doctoral degrees and 36% of those with bachelor’s degrees reported feeling disappointed. ( $\chi^2 = 8.90$ ,  $df = 3$ ,  $p = .031$ ).

One former ISEA/NEA member lamented, “I felt disappointment for not being supported when I was a [member].” Another former ISEA/NEA member indicated they had wanted to help with local negotiations, but said, “We have no say in negotiations and they do a bad job in getting what the majority wants. They are on negotiations for their own agenda.”

Guilt. Guilt was the third most common emotion experienced by former ISEA/NEA members with 40% reporting feeling guilt. Guilt created a statistically significant difference related to longevity in education, building level, and attained education

*Longevity in education.* Again, longevity in education reflected a relationship of statistical significance, but all groups were moderately close to each in terms of percentages. Thirty-three percent of those teaching 11 to 20 years and 32% of both those teaching for 10 years or less and veteran teachers reported feeling guilt as it related to ISEA/NEA membership ( $\chi^2 = 8.49$ ,  $df = 3$ ,  $p = .037$ ).

*Building level.* Also, the building level where educators worked reflected a relationship of statistical significance. While 41% of pre-K/elementary educators reported feeling guilty as it related to their membership, 23% of middle school educators and 29% of high school educators felt the same ( $\chi^2 = 20.85$ ,  $df = 3$ ,  $p < .000$ ).

*Attained education.* Lastly, those with bachelor's degrees were more inclined to feel guilt. While 37% of those with bachelor's degrees felt guilt, 28% of those with master's degrees and 22% of those with specialist or doctoral degrees concurred ( $\chi^2 = 12.71$ ,  $df = 3$ ,  $p = .005$ ).

Feelings of guilt appear largely related to local negotiations and colleagues taking on extra work. One teacher shared a common sentiment among teachers in this study, "I feel a little guilt for not supporting the collective bargaining." Another said, "I do sometimes feel like I should join because I do appreciate having a strong voice for teachers for local negotiations." One female teacher indicated guilt was a primary

emotion by saying, “Several of my friends belong to ISEA and they do a lot of work outside of school. I do appreciate their time and efforts.”

Anger. Of former ISEA/NEA members, 36% reported they felt anger related to their ISEA/NEA membership. While 18% of those teachers in the field 10 years or less reported feeling angry, 30% of those teaching 11 to 20 years and 32% of those teaching 21 years or more concurred ( $\chi^2 = 7.73$ ,  $df = 3$ ,  $p = .052$ ).

Respondents cited a host of reasons in which they felt anger. One teacher explained, “I felt anger at being harassed every year with implications that I was a freeloader for not paying dues.” Another said, “I felt anger for not being supported when I was an [ISEA/NEA member]. One more teacher said, “During the first year, when I realized what they stood for, I was angry that my money had gone to support them.” Another said, “I was angry because of what [ISEA/NEA] represented.”

Embarrassment. Although embarrassment was not the most common emotion with 26% of respondents citing this, many statistical significance differences emerged among those that did feel embarrassment related to their ISEA/NEA membership.

*Longevity in education.* Teachers in the field 21 years or more were more inclined to report embarrassment at 25%, as compared to 20% of those in education between 11 to 20 years and 14% of those teaching 10 years or less ( $\chi^2 = 10.18$ ,  $df = 3$ ,  $p = .017$ ).

*Building level.* Pre-K/elementary educators were more inclined to report embarrassment at 26%, versus 16% of middle school educators and 19% of high school educators ( $\chi^2 = 7.77$ ,  $df = 3$ ,  $p = .051$ ).

*Political orientation.* Politically, 25% of conservatives cited embarrassment, as compared to 20% of moderates and 13% of liberals ( $\chi^2 = 7.81$ ,  $df = 3$ ,  $p = .050$ ).

*Political party affiliation.* Likewise, 25% of Republicans reported embarrassment as a result of their membership with ISEA/NEA, while 19% of Independents and 12% of Democrats concurred ( $\chi^2 = 12.77$ ,  $df = 3$ ,  $p = .012$ ).

One teacher said of her embarrassment, “I was embarrassed that I ever joined in the first place and relief that I’m not longer a part of it.” Another teacher said, “I was embarrassed to be associated with the ISEA/NEA.” Another recalled, “I had attended the initial offering of contracts as an interested person and to see what the district was offering. I was absolutely appalled at how ISEA approached and reacted to the presenting members of my district. I was embarrassed to think that the district believed I was there as part of the union.”

Surprise. Of former ISEA/NEA members, 17% of respondents indicated surprise as an emotion they felt related to their ISEA/NEA membership. Only one statistically significant relationship emerged related to the emotion of surprise.

*Attained education.* While 44% of those with specialist or doctoral degrees were more inclined to cite surprise as an emotion tied to their ISEA/NEA membership, 14% of those with bachelor’s degrees and 13% of those with master’s degrees concurred ( $\chi^2 = 10.363$ ,  $df = 3$ ,  $p = .016$ ).

Surprise largely centered on the cost of ISEA/NEA membership dues. One teacher said, “I was surprised by the high cost of [membership]. However, the bigger



surprise was how much of the money was leaving the local union. Too much money was being asked for by the state and national levels.” Another shared concern of the cost by saying, “I was very dismayed at the yearly fees [for ISEA/NEA membership].”

Fear. Only 12% of the survey population indicated fear as a primary emotion related to their ISEA/NEA membership. There were no statistically significant differences identified related to fear.

One teacher recalled that after she and a few colleagues withdrew membership from ISEA/NEA, “The lawyer from the UniServ came to school to meet with us as a group and tried scare tactics and guilt to get us to rejoin.” Another teacher had a similar experience when recalling, “The local UniServ direction threatened me with a lawsuit when I challenged him about something he had done. I was done [with membership] after that.” Yet another teacher said, “When a co-worker decided to switch to PEI, she told one of the local people of the union that she wanted out of her union membership. It was not well-received and she was told she was on ‘her list’, [although she was unclear what being on the list meant exactly].”

Another teacher who was approached in the hallway by a union representative said, “I once had a local union rep approach me in the hall with an application for union membership, with my info already filled, including my social security number, and say to me, ‘If you want to keep your job next year, fill this out.’ Needless to say, I didn’t. And I still work here.” Another teacher talked of her fear-driven choice to join. She said,

As a new teacher, I was encouraged to join ISEA/NEA to ‘protect’ myself in case of something bad happening. It was fear-driven. I joined and the ‘bad thing’ happened. The district ran into a budget crisis and the newest member of each department was ‘chopped’. I was one of several. Our union rep ‘fought’ for us, but it was ineffective and we lost. When I filed for unemployment, the union rep fought against me. Not a great experience and it proved that the scare tactic was silly. The ‘worst’ happened and the union did not help.

Lastly, as one teacher said, “Most people support NEA because they need protection. I don’t think they have any clue about any of this. It’s to save your ass and because it is very widely known in this [district]. Because it was presented to me when I came to the [district] you get scared and you feel like there are no other choices.”

The next three sections highlight former member’s level of awareness, involvement, and alignment with ISEA/NEA political activities. These sections also analyze how awareness, involvement, and alignment with the ISEA/NEA political activities tied to their membership choices.

#### ISEA/NEA Membership Awareness of Political Activities

The sixth research question centered on the degree to which former ISEA/NEA members were aware of the ISEA/NEA political activities. Study participants were asked to identify their awareness of political activity in general. But more specifically, they were asked about their awareness regarding: (1) ISEA/NEA resolutions describing their political and social platform, (2) ISEA/NEA resolutions not directly tied to the classroom, (3) ISEA/NEA Political Action Committee activities, (4) ISEA/NEA political party alignment, and (5) affiliate organizations of ISEA/NEA.

Both quantitative and qualitative data were utilized to answer this research question. The quantitative data reflects the findings from the survey utilized in this study. When ordinal data is referred to, results of an ANOVA will be reflected. The qualitative data incorporates the use of quotes derived from both the focus group participants and the narrative provided by respondents in the survey comment boxes. The following section will break down the factors related to awareness, as well as provide insight into statistically significant relationships which emerged among the factors.

### Resolution Awareness

Notably, 58% of former ISEA/NEA members reported being unaware of the NEA adopted resolutions, which describe NEA's political and social platform. When analyzed further, resolution awareness created statistically significant differences related to longevity in education, political orientation, and political party affiliation.

Longevity in education. While 24% of teachers newest to the field with 10 years or less reported awareness of NEA resolutions, 38% of those teaching 11 to 20 years and 48% of those teaching 21 years or longer indicated awareness of the resolutions ( $\chi^2 = 19.98$ ,  $df = 3$ ,  $p < .000$ ).

Political orientation. Politically, 22% of liberals reported being aware of the ISEA/NEA's resolutions, while 44% of moderates and 45% of conservatives indicated they were aware of the resolutions ( $\chi^2 = 14.26$ ,  $df = 3$ ,  $p = .003$ ).

Political party affiliation. Additionally, 30% of Independents and 36% of Democrats reported awareness of the resolutions, while 43% of Republicans said the same ( $\chi^2 = 12.92$ ,  $df = 4$ ,  $p = .012$ ).

Many former members commented that the resolutions were the key political element that guided their decision to discontinue membership, largely because they didn't know about the platform until after they had joined. Several former members indicated that once they learned of the platform, regardless of stage of their career, the platform led to them quitting ISEA/NEA.

One teacher recalled, "At the time [of joining], I wasn't aware, but the longer I was working, the more knowledgeable I became." One teacher said, "As a member I wasn't [aware]. When I learned about the resolutions, [that] prompted me to leave." Another said, "I disagreed with many of [the resolutions], which is why I left." Yet, another shared, "I was not aware of the extent of the NEA political and social platform until a fellow teacher told me." Lastly, another said, "During my membership [with ISEA/NEA], in my previous life, before having my eyes opened, I knew nothing. Now I know a lot." Lastly, one teacher readily admitted, "I didn't pay attention to the resolutions."

#### Awareness of Issues Unrelated to Education

Of all previous ISEA/NEA members responding to this question, 56% were unaware of the NEA platform resolutions perceived as not directly tied to education, while 44% reported they were aware of the issues that many perceived to be unrelated to

education. When analyzed further, three statistically significant differences emerged related to gender, longevity in education, and political orientation.

Gender. While 55% of males indicated awareness of non-education issues promoted by NEA, 39% of females indicated awareness ( $\chi^2 = 8.31$ ,  $df = 1$ ,  $p = .004$ ).

Longevity in education. While 30% of teachers with ten years or less reported being aware of non-education issues endorsed by ISEA/NEA, 38% of those teaching 11 to 20 years and 85% of those teaching 21 years or longer indicated awareness ( $\chi^2 = 14.30$ ,  $df = 3$ ,  $p = .010$ ).

Political orientation. Only 13% of liberals were aware of non-education related issues promoted by the NEA, while 47% of moderates and 48% of conservatives reported an awareness ( $\chi^2 = 15.38$ ,  $df = 3$ ,  $p = .002$ ).

One teacher commented, “[A focus on non-education issues] doesn’t surprise me. It seems the NEA has ‘hidden agendas’ often.” Another said, “[They] support issues my religion does not support.” Another indicated, “I’m sure I would agree with some of the union’s [positions], but I am equally sure I disagree with many more of their positions.” Yet another said, “I support a progressive agenda.”

#### Political Action Committee Awareness

Of all previous ISEA/NEA members responding to this question, 60% were unaware of the NEA Fund for Children and Education Political Action Committee (PAC), while 40% reported being aware of the PAC. Only one relationship of statistical significance emerged through further analysis.

Longevity in education. For those that were teaching 10 years or less, 72% were unaware of the NEA PAC. Comparatively, 64% of those teaching 11 to 20 years and 53% of those teaching 21 years or more were unaware of the PAC ( $\chi^2 = 10.78$ ,  $df = 3$ ,  $p = .013$ ).

#### ISEA/NEA Political Party Alignment

Notably, 52% of previous ISEA/NEA members reported being somewhat or very aware of the tie between the NEA and the Democratic Party. ISEA/NEA's political party alignment created a statistically significant difference related to political orientation and political party affiliation.

Political orientation. A one-way ANOVA was calculated on respondent's awareness of ISEA/NEA alignment with the Democratic Party. Statistically significant differences emerged between moderates and conservatives ( $F(3, 379) = 10.438$ ,  $p < .000$ ). Moderates were more inclined to say they were unaware of the ISEA/NEA alignment with the Democratic Party ( $M=2.22$ ,  $SD= 7.14$ ) than conservatives ( $M=2.72$ ,  $SD= 1.136$ ).

Political party affiliation. A one-way ANOVA was calculated on respondent's awareness of ISEA/NEA alignment with the Democratic Party. Statistically significant differences emerged between Democrats and Republicans ( $F(4, 400) = 2.987$ ,  $p = .019$ ). Democrats were more inclined to say they were unaware of the ISEA/NEA alignment with the Democratic Party ( $M=2.08$ ,  $SD= 8.68$ ) than Republicans ( $M=2.59$ ,  $SD= .073$ ).

For some former members, the tie to the Democratic Party was not a concern. One teacher said, “It doesn’t matter to me. I would one hundred percent support that. That is my political party.” Another said, “I am an Independent, but voted for the Democratic ticket.”

However, others did not believe the ISEA/NEA should have such a partisan alignment to the Democratic Party, with regard to political candidate endorsements, donations to Democratic leaning candidates or organizations, or the Democratic Party platforms. One teacher said, “I was very unhappy about the gross support of the Democratic Party.” As one teacher said, “They were always recommending we should support Democrats.”

Another educator said of political party involvement in general, “There are good and bad things supported by both the Republicans and Democrats. If PEI becomes too much of a Republican association, I will remove myself from it as well. I prefer that political ideologies be left to the personal side of our lives, *not* my education association.”

#### NEA Organizational Affiliations

Over half, 56%, of previous ISEA/NEA members reported a lack of awareness of NEA’s affiliation with progressive organizations through NEA contributions, gifts, and grants. Awareness of ISEA/NEA’s organizational affiliations created a statistically significant difference related to political orientation and political party affiliation.

Political orientation. A one-way ANOVA was calculated on respondent's awareness of ISEA/NEA's organizational affiliations. Statistically significant differences emerged ( $F(3, 379) = 9.293, p < .000$ ). Liberals were more inclined to say they were unaware of the ISEA/NEA organizational affiliations ( $M=1.96, SD= .706$ ) than conservatives ( $M=2.53, SD= 1.049$ ). Additionally, moderates were more inclined to say they were unaware of the ISEA/NEA organizational affiliations ( $M=2.13, SD= .933$ ) than conservatives ( $M=2.53, SD= 1.049$ ).

Political party affiliation. A one-way ANOVA was calculated on respondent's awareness of ISEA/NEA's organizational affiliations. Statistically significant differences emerged ( $F(3, 379) = 9.293, p < .000$ ). Democrats were more inclined to report they were unaware of the ISEA/NEA organizational affiliations ( $M=1.97, SD= .839$ ) than Republicans ( $M=2.43, SD= 1.073$ ).

One teacher readily admitted, "I knew [ISEA/NEA] supported groups that were unrelated, but I didn't know all of them." Another said, "I wasn't aware until I started doing a little investigating and discovered some of the groups they support. I was appalled as to where my money was being spent, which included groups and organizations that I am strongly against supporting." Another said, "I was teaching in another state and had no idea until a co-worker who was a member of PEI told me. He had been part of NEA previously and traveled to numerous NEA events at their national headquarters. He was upset by the misuse of [membership fees]." Another teacher reiterated, "I started learning what NEA contributed to and that helped me re-think my membership."



One teacher said, “[ISEA/NEA’s] anti-conservative, anti-traditional positions are quite obvious.” Yet another said, “There are things that the NEA supported that I do not have problems with, but I do not think my contributions should be used to promote even ‘progressive’ agendas that I might favor.” That said, one teacher said, “While a young teacher/new member, I was very unaware of these connections. Later, when I learned of them, I was furious that my membership dollars went to these organizations. I believed my money had been supporting education.”

#### Average Member Awareness

All survey respondents were asked about their perception of how aware they believed the average ISEA/NEA member was of ISEA/NEA political action. Notably, 67% indicated they believed the average current member is unaware of ISEA/NEA political activity in general. No statistically significant differences emerged through additional analysis.

#### Educators as Informed Consumers

Part of making informed choices is taking the time to do research and understand the facts from ones’ own perspective. All survey respondents were asked, “To what degree are educators willing to research how their ISEA/NEA membership dues are allocated?” Notably, 50% of respondents indicated they believed that educators do little or no research and have no idea how their membership dues are spent, while 46% believed educators might do a little research, but still don’t know for sure how their membership dues are allocated. Lastly, 4% believed that educators do research their membership with ISEA/NEA and know how their membership dues are spent. One

statistically significant difference emerged related to educator's willingness to be informed consumers.

Gender. Females were more inclined to believe that educators are educated about their ISEA/NEA membership. While 47% of females indicated members did not research and were not well-informed about how dues were allocated, 48% said that educators do research about ISEA/NEA so that they are self-informed. Only 5% of females believed that ISEA/NEA members were well educated and knew how their dues were spent. Comparatively, 57% percent of males indicated ISEA/NEA members did not research and did not know how dues were allocated, while 43% indicated that educators do not inform themselves. No males believed that ISEA/NEA members were well educated and knew how their dues were spent ( $\chi^2 = 12.49$ ,  $df = 2$ ,  $p = .002$ ).

Some respondents had additional thoughts on this perception of members being unaware. One teacher said, “[In general] Americans don’t do their research. Too many will watch a partial debate or hear bits and pieces of news and the news may be highly skewed and we sometimes only get the information people want us to get. In order to get truthful information, you have to do your own research and do the digging.” As one respondent said in response to others who took time to educate themselves, “You thought about your money and to not have the time to figure out where \$80 a month is going, that’s a unique statement... especially in a profession where we are supposed to be critical thinkers.”

One teacher agreed by saying that, “Teachers were shockingly ill-informed when it comes to politics. I think it is very easy to initially convince people like me that this is

not a choice.” However, she went on to say, “But now I think the word has gotten out that we do have choices and I think there is a secret community of teachers who do not fall in line with the [district union]. Now we are asking questions.” Another said, “It boils down to two things. One, [members or potential members] are being educated [by outsiders] and two, they are asking questions. Before they weren’t doing that. Now we see a shift.”

Barriers to informing themselves. Study respondents identified many factors inhibiting educator research and awareness about ISEA/NEA. The barriers identified included time, the perception of educators not caring, educators believing they had no choice, and educators trusting that ISEA/NEA was representing them as they indicated they would. More detailed description of these factors follows.

*Time.* Some educators provided excuses for the perceived teacher apathy, with time being a number one factor. One respondent said, “Teachers are just too busy [to research].” Another reiterated this idea, “In the big picture, most are concerned about the local [issues] and barely have time to research their trusted professional organization.” Yet another said, “Everyone is too swamped with the commitments of our teaching jobs.”

Another spin on the time issue emerged. As one teacher said, “With all that is thrown at educators at the beginning of the school year, when the ISEA does big pushes for membership with sign on bonuses and teacher luncheons, educators don’t have time to research and just sign up.” Lastly, although one teacher was aware of the platform, she said, “I didn’t take the time to read them all. I didn’t agree with the many, once I did read [them].”

*Do not care.* One educator said of other educators, “I believe many of them simply do not care.” Someone else reiterated this by saying, “Most teachers I spoke with were unaware that dollars went beyond the local level and didn’t even seem to care.” Another said, “We are sheep...sadly.” Another said, “They choose to be blind to the politics. Inward looking, not seeing the big picture. Sheep in my book, but that is their choice and I respect it.” Another said, “They don’t research, they follow blindly, like I used to.” As another teacher put it, “If someone like myself tries to inform uniformed members, they think I am making up the information or that I am crazy and misinformed. Some members do not care about where dues go and join just to feel secure.” Another said, “I feel like people only join because our local chapter does the bargaining and they think they won’t get a raise if they don’t belong. They have no clue what ISEA stands for and what is actually happening with their money.”

One teacher went so far as to say, “I would say most [members] are just unaware and don’t pay attention. That’s why there are committees formed to do the thinking for them.” Yet, another said, “There are good teachers and poor teachers. The good ones do the research and eventually withdraw from the organization, as soon as they realize they have been bamboozled in supporting dysfunctional ideologies.” Yet another said, “There is not scrutiny. You just get your form and sign up. There is not the questions about what [the union] is doing, what [the union] is about.”

*No choice.* Some former members indicated that the idea that educators believe they don’t have a choice in joining is key to this apathy. One said, “Once you think you don’t have choice, you really are unconcerned with where your money is going.” Another

said, “I don’t think most people feel they have a lot of control over where the money goes.” Yet, another teacher said, “If other options aren’t presented, they don’t even know there are other options.” Another teacher said, “This is a major problem. Most members join because they think they have to. They have been brainwashed into believing ISEA/NEA is the main reason they won’t be fired or terminated.”

*Trust.* Other former members placed blame on trust as a factor for not being well-informed. One teacher said, “I think for the most part, educators are just trusting individuals that belong for protection purposes and don’t always dig deep into what their dues are spent on.” Another said, “We should be able to trust the organization that is ‘representing’ us.” Yet another said, “We don’t have time to research. We mostly just trust the more experienced teachers who told you, ‘It is a good thing to join.’” Another teacher said, “The job is overwhelming enough without having the task of researching an organization that is supposed to be ‘on our side.’” One more said, “Educators are just trusting of an organization that claims to represent them.”

But another concluded, “The trust is being taken advantage of... bully, deception, apathy, uninformed. Not something we would like attached to the profession.” Lastly, another said, “Because [NEA] is so nationally known, so well known, people don’t question it because it has been around forever. So it should be doing what it’s supposed to be doing and we are just supposed to trust it.”

*Critical consumers of information.* One teacher said, “I have found that teachers join just because others have joined. I feel we are becoming a society of followers and non-thinkers.” Yet another said, “Many educators hold a lemming mentality,” while

others referred to uniformed educators as “sheep blindly following.” One teacher was incensed when she recalled,

I was told by someone at the start of the year that joining ISEA/NEA is something ‘you just do. You don’t think about it.’ That statement was incredible to me. When is it ever okay or good to just do something without thinking about it? Isn’t thinking about things something we want our students to do, so shouldn’t we as educators do the same, especially when we contribute such a significant amount of money?

### ISEA Transparency

Another aspect of awareness is tied to ISEA/NEA’s willingness to inform prospective and current members about ISEA/NEA political activity. All study participants were asked, “To what degree do you believe ISEA/NEA leaders willingly inform potential members about how membership dues are allocated and the political activities organization at all levels?” Of those that responded, 64% indicated ISEA/NEA had minimal or no willingness to educate potential or current members in a forthright manner about ISEA/NEA dues allocation and political activities. That said, 36% indicated they believed ISEA/NEA moderately or significantly worked to educate potential and current members. Two statistically significant differences emerged after further analysis.

Political orientation. A one-way ANOVA was calculated related to respondent’s belief that ISEA/NEA is transparent and willing to inform educators about political activity ( $F(3, 587) = 6.786, p < .000$ ). Moderates were more inclined to believe that ISEA/NEA has minimal or no willingness to educate potential members ( $M=2.04, SD=1.387$ ), than liberals ( $M=3.46, SD= 1.358$ ). Similarly, conservatives were more inclined

to believe that ISEA/NEA has minimal or no willingness to educate potential or current members ( $M=2.48$ ,  $SD= 1.338$ ) than liberals ( $M=3.46$ ,  $SD= 1.358$ ).

Political party affiliation. A one-way ANOVA was calculated related to respondent's belief that ISEA/NEA is transparent and willing to inform educators about political activity ( $F(4, 603) = 5.646$ ,  $p < .000$ ). Independents were more inclined to believe that ISEA/NEA has minimal or no willingness to educate potential members ( $M=2.66$ ,  $SD= 1.392$ ) than Democrats ( $M=3.22$ ,  $SD= 1.453$ ). Similarly, Republicans were more inclined to believe that ISEA/NEA has minimal or no willingness to educate potential or current members ( $M=2.49$ ,  $SD= 1.316$ ) than Democrats ( $M=3.22$ ,  $SD= 1.453$ ).

Factors inhibiting transparency. Study respondents identified many factors inhibiting ISEA/NEA transparency. These included a lack of transparency on the part of ISEA/NEA leadership, a lack of available information, and the self-preservation of the organization. More detailed description of these factors follows.

*ISEA/NEA leadership.* Transparency by union leaders was a significant concern for many former members. While many inquired with the union to access more information about expenditures tied to membership dues, they felt like the information provided was distorted, incomplete, or difficult to interpret.

To minimize the concerns expressed while they were members with ISEA/NEA, they would hear comments from ISEA/NEA leadership like, "Oh don't worry about any of that- you can vote however you would like." This same teacher goes on to say, "As if as an American I don't know that, but again, I don't want any of my money spent in these

ways.” One untrusting former member said, “[ISEA/NEA] leaders do not want you to know how your money is being spent.” One teacher said, “My impression as I found out more and more is that [the union] wanted to keep it quiet. Had I known at the beginning I would have never joined.”

Another teacher indicated she had inquired about how dues were spent politically and recalled, “Even though they denied [spending dues on politics], I knew it was happening based on their financial statements.” Yet another said, “I think they would supply information, but again, they will present it in a way that is not telling the whole truth. The truth will be twisted.” Another agreed by saying that, “Research can be done by educators, but sometimes the information found is not the complete truth.” Another teacher reiterated this by saying, “This is one of the major reasons I left the union. Many years ago, when I inquired about where my dues went, I couldn’t get straight answers.” One teacher went as far as to say trusting the information provided was a concern because, “I was interested [in membership], though it sometimes felt like there was a lot of cover up to know how funds were spent.” One frustrated former member said, “In my district everything seems pretty secretive.”

When it came to politics, one teacher said, “[ISEA/NEA leaders] always says that only NEA PAC monies go toward political activities. I consider this a dubious claim. At the very least, political endorsements are made by the NEA, not NEA-PAC. So it is at best a misleading statement.” One teacher said, “If you have leaders on the payroll promoting ideologies, directly or indirectly the majority of funds are used for PAC, that in my mind when you check the box to support PAC, you are just supporting PAC more.”



That said, some former members give local leaders the benefit of the doubt that it was not malicious intent to not be transparent. Many educators believe union leaders may not have all the information themselves. One teacher said, “Statements like ‘ISEA/NEA doesn’t support any political candidates or political causes’ are made by local [union leaders], and they may actually believe their statements.”

*Lack of information available.* Former members also expressed concern that information is just not readily available. One teacher cited, “Not only is [research] time consuming, but many platform and political facts about how dues are used are difficult to locate.” Yet another recalled, “I did as much research as I could into how my membership dues were spent at the local, state, and national while part of a NEA in another state, but I was unable to find a detailed breakdown.” Lastly, as one teacher said tongue in cheek, “[Membership] was not explained very well. It was said, ‘You just need to sign this paper.’ It was not explained. You get more information on a Geico commercial about insurance than you do from them about [being part] of educational association.”

Tied to the concern of information not being readily available by ISEA/NEA, others reported they had to look beyond the union to find information that would guide them in their membership decision making. One teacher said, “It isn’t ISEA/NEA that had made me aware. It was PEI, CEAI, [Christian Educators Association International], colleagues, and other Christian organizations that helped me to understand.”

Despite concerns of leadership transparency and a lack of information, many educators believe it is ultimately up to each potential or current member to do their due

diligence and research membership as much as possible. One teacher recalled the steps she took to guide her decision making by saying, “Before I made the decision to join or not join the union, I contacted conservative leaders here in Iowa and got honest feedback on the agendas of the ISEA/NEA. I also requested information from the ISEA and again, my questions were not answered and again it was just more political rhetoric.”

*Self-preservation.* Many feel ISEA/NEA leaders tell prospective members what they want to hear to keep the membership and dues up. One teacher surmised that ISEA/NEA leadership is reluctant to share how money is spent on political endeavors “because they know they would lose members.” Another doubting former member said, “In my opinion, their goal is to get members and more dollars, not to look out for their membership.” Yet another teacher said, “They only want the money [of potential members].” Another said, “As long as the [dues] money is coming in [ISEA/NEA] are happy. If someone turned off the money spicket, they would probably be more concerned with the rank and file.”

#### Comparing Perceptions of Informed Educators and ISEA/NEA Transparency

Both educators who inform themselves and union transparency are keys to a clear understanding of how ISEA/NEA represents educators politically. Further analysis was conducted to compare these two areas. Table 46 reflects cross section of these two perceptions.

Table 46

*Educators as Informed Consumers and ISEA/NEA Transparency*

Educators Inform Themselves (N = 599)	ISEA/NEA Transparency	ISEA/NEA Min/No Willingness to Inform (N=384)	Percent	ISEA NEA Mod/High Willingness to Inform (N=215)	Percent
Educators do no research and do not know how dues are spent		222	37.0	78	13.0
Educators do some research, but still do not know how dues are spent		150	25.0	127	21.0
Educators do research and know how dues are spent		12	2.0	10	2.0

*Note.* “ISEA/NEA Min/No” reflects the belief that ISEA/NEA has no or minimal willingness to inform educators. “ISEA/NEA Mod/High” reflects the belief that ISEA/NEA has moderate or high willingness to inform educators.

As can be seen in Table 46, data was gathered from nearly 600 survey respondents, including both former ISEA/NEA members and those who bypassed membership. Only 2% of all survey respondents believed that educators both informed themselves and know how dues are spent, as well as that ISEA/NEA was moderately or significantly willing to inform their potential membership. Additionally, another 2% of the respondents indicated that educators do work to inform themselves and know how dues are spent, despite ISEA/NEA showing minimal or no willingness to be transparent with potential members. No statistically significant differences emerged after further analysis.

### ISEA/NEA Membership Involvement with Political Activities

The seventh research question centered on the degree to which former ISEA/NEA members were involved with ISEA/NEA political activities. ISEA/NEA involvement on the whole was not overly high for former members. As reported by many educators, this may be attributed to the perception that ISEA/NEA merely wanted membership dues versus active membership involvement.

Specific questions centered on former member's: (1) level of involvement with ISEA/NEA, (2) perceptions of their ability to influence the political activities of ISEA/NEA, (3) level of involvement with political action, (4) divergence in thinking, and (5) their contribution to NEA PAC. A detailed analysis for each area will be provided in the following section. Both quantitative and qualitative data were utilized to answer this research question. The quantitative data reflects the findings from the survey utilized in this study. When ordinal data is referred to, results of an ANOVA will be reflected. The qualitative data incorporates the use of quotes derived from both the focus group participants and the narrative provided by respondents in the survey comment boxes. The following section will break down the factors related to involvement, as well as provide insight into statistically significant relationships which emerged among the factors.

#### Former Member Level of Involvement with ISEA/NEA

Notably, 61% of former members indicated they were uninvolved and simply paid dues to ISEA/NEA, while 31% reported they considered themselves to be an "average member." A small percentage, 8%, of former members identified themselves as activists

or in leadership roles with ISEA/NEA. No statistically significant differences emerged after further analysis.

#### Former Member Involvement with ISEA/NEA Compared to Political Involvement

Seeking to understand if the lack of ISEA/NEA involvement coincided with their level of involvement in politics in general, further analysis was conducted. While no statistically significant differences were present, key findings will be shared. Comparing involvement in ISEA/NEA to their own political involvement, 44% of former ISEA/NEA members indicated they were uninvolved with politics in general, 32% were moderately involved and 3% were actively involved in politics. Nearly a quarter of respondents, 23%, indicated their level of involvement in politics depended on the year.

Table 47 reflects the cross section of the activity former members reported in both ISEA/NEA and within politics in general. No statistically significant differences emerged after further analysis.

While many opted not to be actively involved with ISEA/NEA, some members desired involvement, but were denied. One teacher recalled her efforts as a former member to be involved, although to no avail, “I became a building representative in an attempt to influence the direction of the local union away from the state and national political issues, but they weren’t interested in a conversation.” Another said, “I heard of efforts to change NEA from the inside and it was an effort in futility.”

Table 47

*ISEA/NEA Activity and Political Activity Levels*

Former Member Engagement in ISEA/NEA	Former Member Engagement in Politics (N)	Actively Involved		Moderately involved		Uninvolved		Depends on the year	
		(N)	Percent	(N)	Percent	(N)	Percent	(N)	Percent
Uninvolved ISEA	(N = 239)	3	1.0	72	30.0	113	47.0	51	21.0
Average Member ISEA	(N = 116)	5	4.0	39	34.0	43	37.0	29	25.0
Activist ISEA	(N = 6)	1	16.5	1	16.5	1	17.0	3	50.0
Leader ISEA	(N = 26)	2	8.0	6	23.0	12	46.0	6	23.0

Influence of ISEA/NEA Political Activities

Another aspect of involvement in ISEA/NEA relates to the belief that members believe they can influence the direction of the organization. Only two percent of former members believed they could influence the political activities of ISEA/NEA, while 61% indicated they could not. The remaining 37% indicated “it wouldn’t matter if they had tried,” “didn’t want to,” or “I’m not sure.” One statistically significant difference emerged after further analysis.

Political orientation. A one-way ANOVA was calculated related to respondent’s belief that they had influence over the direction of ISEA/NEA political activity ( $F(4, 406) = 3.234, p = .012$ ). Independents were more likely to believe that they could not influence

the direction of ISEA/NEA ( $M=2.32$ ,  $SD= .711$ ) as compared to Democrats ( $M=2.88$ ,  $SD= 1.224$ ).

### Former Member Influence Compared to Current Member Influence

While only 2% of former members believed they had influence on political activities of ISEA/NEA, 10% believe now that the average member has some or much influence over ISEA/NEA political activities. Some former members attribute this higher rate of influence to current member's involvement with leadership roles. To illustrate this idea, one teacher said, "Much of the political activity is done by committees and/or activists. The average teacher is too busy or just doesn't care. They blindly pay their dues for the insurance."

### Call to Action

To dig deeper into the notion of involvement on the part of former ISEA/NEA members, they were asked to share what action they took when they disagreed with the political activity of the ISEA/NEA. The findings indicated that 35% of former members did nothing, 4% spoke up at meetings, and less than 1% worked to change the policies when they disagreed with the political activity of the teachers' union. The most common response however, was reflected by 52% of former members who chose to discontinue ISEA/NEA membership. Two statistically significant differences emerged related to political orientation and political party affiliation.

Political orientation. A one-way ANOVA was calculated related to respondent's responses to ISEA/NEA political activity they disagreed with ( $F(3, 375) = 7.248$ ,  $p <$

.000). Liberals ( $M=2.22$ ,  $SD= 1.808$ ) and moderates ( $M=2.68$ ,  $SD= 1.613$ ) were more inclined to do nothing than conservatives ( $M=3.27$ ,  $SD= 1.319$ ). Moderates were most inclined to work to change political activities ( $M=2.68$ ,  $SD= 1.613$ ), while conservatives were most inclined to drop ISEA/NEA membership altogether ( $M=3.27$ ,  $SD= 1.319$ ).

Political party affiliation. A one-way ANOVA was calculated related to respondent's responses to ISEA/NEA political activity they disagreed with ( $F(4, 400) = 4.848$ ,  $p < .000$ ). Democrats ( $M=2.51$ ,  $SD= 1.764$ ) and Independents ( $M=2.53$ ,  $SD= 1.526$ ) were more inclined to do nothing than Republicans ( $M=3.21$ ,  $SD= 1.385$ ). Independents were most inclined to work to change political activities ( $M=2.53$ ,  $SD= 1.526$ ), while Republicans were most inclined to drop ISEA/NEA membership altogether ( $M=3.21$ ,  $SD= 1.385$ ).

#### Perception of Influence Versus Action Taken

Further analysis was conducted to reveal the cross section between beliefs former members held about their ability to influence ISEA/NEA political activity and the actions they actually took when disagreeing with ISEA/NEA. Table 48 reflects these findings.

Of those who did not agree with ISEA/NEA political activity, many explained the actions they tried to take. One teacher said, "I worked outside of school and supported the candidate of my choice." Another said, "I told them I didn't like the political pressure, never attended another meeting, and joined PEI when I learned about it." Yet another said, "I dropped [ISEA/NEA membership] once I knew there was another option that aligned more with my beliefs and fought for education issues and not political ones."



Lastly, another teacher who did not do anything said, “There may have been a lot of members like me who disagree, but did not know how to change the situation.”

### PAC Contributions

Another measure of involvement relates to providing donations to the NEA PAC. Notably, of former members who were asked about the degree to they contributed to NEA PAC, 84% indicated they gave no financial contribution to NEA PAC. While twelve percent indicated they gave the minimal or suggested contribution, 2% indicated they gave moderate or significant contributions. Another 2% indicated their contribution to the NEA PAC was dependent upon the year. One statistically significant difference emerged through further analysis.

Political party affiliation. A one-way ANOVA was calculated related to respondent’s responses about contributions to NEA PAC ( $F(4, 396) = 3.286, p = .011$ ). Although giving rates were low among all political parties, Democrats ( $M=2.49, SD=1.018$ ) were more inclined to give to the NEA PAC than Republicans ( $M=2.17, SD=.515$ ).

Former members were confused about how PAC donations were collected. Some reported being unsure if they had to opt in or out of donating to the PAC and were left questioning whether their dues were automatically inclusive of PAC donation or if the PAC donation was above and beyond their membership dues. One teacher describes it like this by saying, “Initially it was voluntary and a dollar amount if I remember correctly. Then it was included in [membership dues], but one could request a refund if

you wanted your money back. Then it was not included. Bait and switch.” One former member shared confusion by saying, “I don’t even know what this means.”

Table 48

*ISEA/NEA Member Perception of Influence Versus Action Taken*

Former ISEA/NEA Member Perception of Influence Over ISEA/NEA Political Activity	Action Taken By Former ISEA/NEA When Disagreed with ISEA/NEA		Did nothing		Spoke up		Worked to change policies		Dropped membership	
	(N = 140)	Percent	(N = 15)	Percent	(N = 2)	Percent	(N = 209)	Percent		
Yes, they could influence	2	33.0	0	0.0	1	17.0	3	50.0		
No, they could not influence	91	40.0	7	2.5	1	0.5	130	57.0		
Didn't matter if they tried	24	27.0	6	3.0	0	0.0	60	67.0		
Did not want to try	7	50.0	0	0.0	0	0.0	7	50.0		
Not sure	16	60.0	2	7.0	0	0.0	9	33.0		

Although ISEA/NEA assures members their dues are not used for political activity and gives members the option of not donating to PAC, many former members do not trust that it actually works that way. One said, “They took money from dues to support PAC... always have and always will. Even when I wrote a letter each year to NOT support PAC with my dues, they do what they want.” Another said, “I refused to

designate money to PAC, but knew that a portion of my yearly dues were used for political issues and candidates.” Yet another said, “I just knew that any money given would support candidates for whom I would not be voting for.”

#### Perception of Average Member Involvement

All survey respondents were asked how involved they believed the average ISEA/NEA member with ISEA/NEA political activities. Notably, 89% of respondents perceived current ISEA/NEA members to be largely uninvolved with ISEA/NEA political activities. No statistically significant differences emerged through additional analysis.

One teacher puts it like this by saying, “Most educators that I know that are members and are members merely to protect themselves.” Another said, “I know only one person that seems to be involved and she is the building representative for ISEA/NEA.” Yet another said, “At my school, [average members] are very uninvolved.” Another said, “There are a few that are pretty involved, but the vast majority of members just pay the dues and think ‘tell me what to do.’” As one former member also remarked, “For most members, filling out the form at the beginning of the year is the extent of their involvement with the ISEA/NEA.”

#### Divergent Viewpoints Welcomed

Yet another measure of involvement ties to the perception that ISEA/NEA is accepting of divergent viewpoints. While 81% of those surveyed reported believing that ISEA/NEA members with divergent viewpoints were not welcomed to participate and

considered in political activities by ISEA/NEA leaders, 19% believed that a moderate or high degree of consideration was held for those with divergent viewpoints. When analyzed further, two statistically significant differences emerged.

Political orientation. A one-way ANOVA was calculated related to respondent's perception that ISEA/NEA welcomed divergent viewpoints ( $F(3, 566) = 10.935, p < .000$ ). Moderates ( $M=2.58, SD= 1.196$ ) and conservatives ( $M=2.10, SD= 1.091$ ) were more inclined to believe that ISEA/NEA provided minimal or no consideration for divergent viewpoints than liberals ( $M=2.97, SD= 1.204$ ).

Political party affiliation. A one-way ANOVA was also calculated related to respondent's perception that ISEA/NEA welcomed divergent viewpoints ( $F(4, 580) = 7.505, p < .000$ ). Democrats ( $M=2.81, SD= 1.190$ ) were more inclined to believe ISEA/NEA welcomed divergent viewpoints than Republicans ( $M=2.14, SD= 1.089$ ).

Educators shared many stories demonstrating their belief that ISEA/NEA was not tolerant of divergent perspectives. One teacher recalled, "I was informed that my viewpoint was not that of the group and would not be considered." Another teacher similarly said, "When I tried once to express a divergent viewpoint, I was interrupted and told to sit down and be quiet." Another said, "I made suggestions for issues to be considered during negotiations and was informed that my ideas did not affect enough people and it was not the 'direction they were going.'" Another formerly active ISEA/NEA member said, "I was asked to be in charge of membership when I was an ISEA member. I mentioned to them that it would increase our membership if we were

less political and more about education. There was dead silence in the room. That was my first sign that I was in the wrong organization.”

Yet, another respondent said, “I don’t know if they are not welcome, but who would want to participate when those activities are not part of one’s belief system?”

Another said tongue-in-cheek, “All are welcome so long as they are not traditional, conservative, or Christian.” Lastly, another teacher cynically said they were concerned about divergent view points from the standpoint of “keeping members, but not to change anything.”

Respondents felt politics played a key role in this perception that divergent viewpoints were not welcome. One teacher said, “I had many members from ISEA/NEA speak around and to me during the last presidential election year about their opinions about politics, knowing I disagreed with their viewpoints and with their support of certain political candidates. I reported the harassment to my building principal and also to the school district.” Another said, “If you aren’t a Democrat, you might as well keep your mouth shut.” Yet another said, “I don’t feel comfortable sharing conservative views that would be counter to the Democratic positions. Their political conversations are so one-sided that they assume everybody obviously agrees with them, but not that they care about alternative views.”

One former member said, “You can talk politics all you want, as long as it is on the Democratic side. If you bring up the Republican side or anything else, then they strike you down and say ‘How dare you even think that?’” Another said, “I think it is just really hard for people who are not in line with the Democratic point of view to voice their

opinion.” Other teachers believed they too would not have a voice heard. One said, “Just because they feel like the minority and they don’t have the personality to speak out. I don’t think those that aren’t in alignment are going to be outgoing and speak their opinion... or don’t feel like they can.”

Looking to the future elections, one teacher said, “I am sick of the politics and dread the next political year in my building. There are members who pass out signs and who do it right in front of those of us who are non-members. There is no regard for opposing views or other opinions when it comes to who supports education or who does not. If things are going well, it’s because a Democrat is in charge. When things are going poorly, it’s all Bush’s fault with his No Child Left Behind law. They forgot Kennedy helped him [pass the law].”

#### ISEA/NEA Membership Alignment with Political Activities

The last research question centered on the degree to which former ISEA/NEA members believed ISEA/NEA political activities aligned with their personal beliefs, attitudes, and values. Specifically, former members were asked about personal alignment to the following: (1) non-education issues or platform promoted by ISEA/NEA, (2) candidate endorsements, and (3) ISEA/NEA organizational affiliations. Additionally, respondents were asked to provide perspective feedback on how they believed ISEA/NEA political activities aligned with the average member and typical ISEA/NEA leader.

Both quantitative and qualitative data were utilized to answer this research question. The quantitative data reflects the findings from the survey utilized in this study.

When ordinal data is referred to, results of an ANOVA will be reflected. The qualitative data incorporates the use of quotes derived from both the focus group participants and the narrative provided by respondents in the survey comment boxes. The following section will break down the factors related to alignment, as well as provide insight into statistically significant relationships which emerged among the factors.

### Non-education Focus

Former ISEA/NEA members were asked to share the degree to which they believed the ISEA/NEA platform aligned with their personal values and priorities about issues perceived to not be directly tied to education. Notably, 68% percent of the former members believed that the ISEA/NEA platform did not align with their personal beliefs and values. While another 12% indicated they thought it somewhat aligned, 20% readily admitted they did not know if the platform aligned as former ISEA/NEA members. Two statistically significant differences emerged after further analysis.

Political orientation. A one-way ANOVA was calculated related to respondent's alignment with ISEA/NEA non-education platform ( $F(3, 379) = 39.017, p < .000$ ). Moderates ( $M=2.08, SD= 1.335$ ) and conservatives ( $M=1.25, SD= .778$ ) were more inclined to believe that they were unaligned with the ISEA/NEA non-education platform than liberals ( $M=2.78, SD= 1.166$ ).

Political party affiliation. A one-way ANOVA was also calculated related to respondent's alignment with ISEA/NEA non-education platform ( $F(4, 404) = 23.704, p < .000$ ). Independents ( $M=1.88, SD= 1.226$ ) and Republicans ( $M=1.36, SD= .948$ ) were

more inclined to believe that they were unaligned with the ISEA/NEA non-education platform than Democrats ( $M=2.74$ ,  $SD= 1.222$ ).

One teacher put it like this by saying, “I was more bothered by the non-education issues being supported [in general], whether I agreed with the issues or disagreed with the issues. I [was] looking for an association that is not Republican or Democratic in its philosophy, but is educationally minded and is looking to protect what is best for kids in public schools.”

### Political Candidate Endorsements

Former ISEA/NEA members were asked to weigh in on the alignment of the political candidates endorsed by ISEA/NEA to their own political affiliations and leanings. While 82% of all former ISEA/NEA members indicated the candidates endorsed by ISEA/NEA never or rarely aligned with their own political affiliations and leanings, 18% indicated the candidates endorsed occasionally or significantly aligned with their political persuasions.

Political orientation. A one-way ANOVA was calculated related to respondent’s alignment of ISEA/NEA candidate endorsements ( $F(3, 605) = 13.641$ ,  $p < .000$ ). Conservatives ( $M=.95$ ,  $SD= .886$ ) and moderates ( $M=1.44$ ,  $SD= 1.177$ ) were more inclined to report that they did not align with ISEA/NEA’s candidate endorsements than were liberals ( $M=1.70$ ,  $SD= 1.631$ ).

Political party affiliation. A one-way ANOVA was also calculated related to respondent’s alignment of ISEA/NEA candidate endorsements ( $F(4, 692) = 22.332$ ,  $p <$



.000). Republicans ( $M=.99$ ,  $SD=.903$ ) and Independents ( $M=1.44$ ,  $SD=1.054$ ) were more inclined to report that they did not align with ISEA/NEA's candidate endorsements than were Democrats ( $M=1.79$ ,  $SD=1.426$ ).

#### Candidate Political Affiliation

Former ISEA/NEA members were also asked how important the political orientation of candidates being endorsed by ISEA/NEA was to them. While 68% of all former members indicated that the political party an endorsed candidate represented was moderately or very important to them, 32% indicated it was unimportant.

Political orientation. A one-way ANOVA was also calculated related to the level of importance respondents placed on endorsed candidates and the party they represented ( $F(3, 376) = 27.851$ ,  $p < .000$ ). Conservatives ( $M=2.68$ ,  $SD=1.102$ ) were more inclined to place importance on the party represented by ISEA/NEA endorsed candidates than were liberals ( $M=1.70$ ,  $SD=.926$ ) and moderates ( $M=1.96$ ,  $SD=.930$ ).

Political party affiliation. A one-way ANOVA was also calculated related to the level of importance respondents placed on endorsed candidates and the party they represented ( $F(4, 398) = 7.634$ ,  $p < .000$ ). Republicans ( $M=2.53$ ,  $SD=1.120$ ) and Independents ( $M=2.04$ ,  $SD=1.095$ ) were more inclined to place importance on the party represented by ISEA/NEA endorsed candidates than were Democrats ( $M=1.81$ ,  $SD=.850$ ).

As it related to political endorsements and other activities, apathy appeared to set in for some former ISEA/NEA members. One teacher said she went along to get along

when saying, “The general idea was to vote Democrat or you were the odd man out.” While political candidate endorsements were important to this particular teacher, she said, “It didn’t seem to matter [how I felt] because I knew [ISEA/NEA was] were always supporting members from the one party.” One teacher recalled, “I always aligned with [ISEA/NEA] because I didn’t have a stand on anything political. Many years later, after becoming a Christian and much more interested in politics, I was told by ISEA/NEA not to vote for a [Republican presidential candidate]. That did it. I withdrew from the union.”

For many teachers who explained they were ill-informed, they just followed the endorsements of the ISEA/NEA. One said, “I was politically unaware when I was younger, so I quite often blindly followed the union’s suggestion.” Another said, “It would have been important to me if I had been aware. I was young and dumb when I belonged to NEA.” Lastly, one teacher said,

Because I did not realize the connections while I was an [ISEA/NEA] member, the [political] factor was unimportant. Later, when I learned of the connections, these things were very important to me. I was disgusted that I had belonged to an organization so philosophically opposed to my personal views. I felt a bit tricked by my undergrad teaching experience in that professional connections were encouraged-with no information regarding professional organizations.”

For some it was a matter of principle, not politics. One teacher shared, “It was important in the sense that I felt the ISEA/NEA should NOT endorse any political candidate.” Another reiterated this concern by saying, “Even if the candidate did align with my beliefs, it should be up to me to make a political contribution.”

For those bothered by the political endorsements of ISEA/NEA they reported many different strategies for dealing with it. One teacher said, “I just ignored their

endorsements,” while another said, “I voted my choices... obviously not the ISEA/NEA way.” Another said, “Usually I knew that if they were endorsed [by ISEA/NEA], that was probably the candidate that I would not support or vote for.” Lastly, another teacher said, “I did not care so much if we disagree a little, maybe there were stronger Democratic candidates than Republican, but to say almost 100% [of endorsements], really?”

For some it boiled down to no longer being an ISEA/NEA member. One Republican teacher remarked, “I didn’t like that they always endorsed and campaigned for the Democrats. It was a big factor in me dropping my membership because although I didn’t contribute to the PAC, I was associated with the NEA’s beliefs by being in the organization.”

#### Organizational Affiliation Alignment

Another aspect of alignment worthy of exploring relates to the organizations with which ISEA/NEA is affiliated. Notably, 86% of respondents believed the ISEA/NEA’s ties to outside organizations does not represent the average ISEA/NEA member. No statistically significant differences emerged after further analysis.

One teacher remarked about the organizational affiliations, “Those are fairly extreme organizations. I believe the average member is more moderate.” Another teacher said, “I think many teachers are not involved enough to dig through all the doctrine and actually realize just what the NEA supports and how they contribute to these kinds of politics.”

### Representing the Average ISEA/NEA Member

Survey respondents were asked if they believed ISEA/NEA political activities in general represented the average ISEA/NEA member. Again, a high percentage, 75% of survey respondents indicated they do believe ISEA/NEA's political action is representative of their membership. But digging deeper into three areas may suggest a discrepancy in that perception. Respondents were asked to share their beliefs about the political orientation of the (1) average ISEA/NEA members, (2) ISEA/NEA leaders, and (3) the ISEA/NEA organization as a whole.

Average member alignment. When survey respondents were asked what political affiliation the average ISEA/NEA member aligns with, 52% of respondents indicated members are moderates, while 42% believe the average member is liberal and 6% believe members are conservative. When analyzed further with respect to the respondents own political leanings and affiliations, statistically significant differences among political party affiliation and political orientation emerged.

*Political party affiliation.* Table 49 reflects these patterns of beliefs about the average member based on respondents own political party affiliations. Two statistically significant differences emerged. A one-way ANOVA was calculated related to the perception of average member political orientation ( $F(4, 584) = 5.503, p < .000$ ). Democrats ( $M=1.80, SD= .615$ ) and Independents ( $M=1.84, SD= .586$ ) were more inclined to say the average member was both more moderate and less liberal than Republicans believed ( $M=1.57, SD= .580$ ).

Table 49

*Respondent Beliefs about Average Members Based on Political Party*

Respondent Political Party Affiliation	Democrats		Independents		Republicans	
	(N = 94)	Percent	(N = 77)	Percent	(N = 379)	Percent
Average member political leanings						
Liberal	29	31.0	20	26.0	181	48.0
Moderate	55	58.0	49	64.0	181	48.0
Conservative	10	11.0	8	10.0	17	4.0

Many survey respondents had additional thoughts about this. One former member said, “As a member, I was never asked what I thought... yet the newspaper would publish how ISEA/NEA people supported things.” Another teacher said, “Very few [members] in my school support all the issues [ISEA/NEA] supports.” One even said, “Most have no idea when something about the political stance of the union is presented to them.”

*Political orientation.* Table 50 reflects these patterns of beliefs about the average member based on respondents own political orientation. One statistically significant difference emerged. A one-way ANOVA was calculated related to the perception of average member political orientation ( $F(3, 572) = 11.437, p < .000$ ). Moderates ( $M=1.75$ ,

$SD = .544$ ) were more inclined to say the average member was both more moderate and less liberal than conservatives believed ( $M = 1.57$ ,  $SD = .580$ ).

Table 50

*Respondent Beliefs about Average Members Based on Political Orientation*

Respondent Political Orientation	Liberals		Moderates		Conservatives	
	(N = 31)	Percent	(N = 134)	Percent	(N = 350)	Percent
Average Member Political Leanings						
Liberal	13	42.0	41	31.0	172	49.0
Moderate	13	42.0	86	64.0	163	47.0
Conservative	5	16.0	7	5.0	15	4.0

Others came at it from a directly political standpoint. One teacher said, “I believe that schools are a reflection of society. Unfortunately, there are a lot of teacher that lean left. They are either liberal or they don’t have a clue as to the political power that ISEA/NEA has in politics today.” One former member said, “Since most members join because they think they have no other choice or they joined for the insurance, they are not necessarily paying dues because they are politically aligned with the ISEA/NEA.”

ISEA/NEA leader alignment. The second area worth analyzing further was the political orientation of ISEA/NEA leaders. Respondents were then asked to identify the political affiliation ISEA/NEA leaders would most often align with. While 83% reported they believed ISEA/NEA leaders were liberally oriented, 13% believed leaders were moderates, and 4% believed were conservatives. When analyzed further with respect to the respondents own political leanings and affiliations, statistically significant differences among political party affiliation and political orientation emerged. Table 51 reflects these patterns of beliefs about ISEA/NEA leadership based on respondents own political party affiliations.

*Political party affiliation.* A one-way ANOVA was calculated related to the perception of ISEA/NEA leader political orientation ( $F(3, 572) = 11.437, p < .000$ ). Democrats ( $M=1.52, SD= .635$ ) and Independents ( $M=1.32, SD= .572$ ) were more inclined than Republicans ( $M=1.10, SD= .386$ ) to report that ISEA/NEA leaders are less liberal and more moderate.

*Political orientation.* Table 52 reflects these patterns of beliefs about ISEA/NEA leadership based on respondents own political orientation. A one-way ANOVA was calculated related to the perception of ISEA/NEA leader political orientation ( $F(3, 578) = 38.678, p < .000$ ). Liberals ( $M=1.66, SD= .827$ ) and moderates ( $M=1.28, SD= .529$ ) were more inclined than conservatives ( $M=1.08, SD= .332$ ) to report that ISEA/NEA leaders are less liberal and more moderate. That said, another statistically significant difference emerged. Moderates ( $M=1.28, SD= .529$ ) were more inclined to say ISEA/NEA leaders are more liberal than liberals ( $M=1.66, SD= .827$ ).

Table 51

*Respondent Beliefs about ISEA/NEA Leaders Based on Political Party*

Respondent Political Party Affiliation	Democrats	Independents	Republicans
Leader Political Leanings	(N = 94) Percent	(N = 77) Percent	(N = 381) Percent
Liberal	52 55.0	56 73.0	353 93.0
Moderate	35 37.0	17 22.0	19 5.0
Conservative	7 8.0	4 5.0	9 2.0

While many educators said they could not say for certainty what political orientation ISEA/NEA leaders had, many others had strong feelings about this. One said in a matter of fact manner, “I would think they would have to be liberal to align with the [ISEA/NEA] politics.” One said, “far left,” while another said, “extremely liberal.” Another did not hold back when she said she believed the ISEA/NEA leaders were “liberal, progressive, communist, radical left, socialist, anti-capitalist.”



Table 52

*Respondents Beliefs about ISEA/NEA Leaders Based on Political Orientation*

Respondent Political Orientation	Liberals		Moderates		Conservatives	
Leader Political Leanings	(N = 32) Percent		(N = 132) Percent		(N = 354) Percent	
Liberal	18	56.0	100	76.0	334	94.0
Moderate	7	22.0	27	20.0	13	4.0
Conservative	7	22.0	5	4.0	7	2.0

ISEA/NEA organization alignment. Respondents were then asked to identify the political orientation of the ISEA/NEA organization as a whole. While 85% of the respondents indicated the ISEA/NEA organization reflected a liberal ideology, 11% believed ISEA/NEA ideology was moderate and 4% believe it was conservative. When analyzed further with respect to the respondents own political leanings, statistically significant differences among political party affiliation and political orientation emerged.

*Political party affiliation.* Table 53 reflects these patterns of beliefs about the ISEA/NEA organization's political leanings based on respondent's own political party affiliations. A one-way ANOVA was calculated related to the perception of the ISEA/NEA organization political orientation ( $F(4, 692) = 61.349, p < .000$ ). One statistically significant difference emerged. Democrats ( $M=1.39, SD= .740$ ) were more

inclined than Republicans ( $M=1.21$ ,  $SD= .630$ ) to report that the ISEA/NEA organization was less liberally aligned and more moderate.

Table 53

*Respondents Beliefs about ISEA/NEA Based on Political Party*

Respondent Political Party Affiliation	Democrats		Independents		Republicans	
	(N = 99)	Percent	(N = 76)	Percent	(N = 383)	Percent
ISEA/NEA Organization Political Leanings						
Liberal	62	63.0	60	79.0	358	93.0
Moderate	27	27.0	11	14.0	20	5.0
Conservative	10	10.0	5	7.0	5	2.0

*Political orientation.* A one-way ANOVA was calculated related to the perception of ISEA/NEA leader political orientation ( $F(3, 605) = 27.078$ ,  $p < .000$ ). Two statistically significant differences emerged. Liberals ( $M=1.41$ ,  $SD= .832$ ) and moderates ( $M=1.19$ ,  $SD= .544$ ) were more inclined than conservatives ( $M=1.03$ ,  $SD= .314$ ) to report that the ISEA/NEA organization is less liberal and more moderate. Table 54 reflects these patterns of beliefs about the ISEA/NEA organization's political leanings based on the respondents own political orientation.

Table 54

*Respondents Beliefs about ISEA/NEA Based on Political Orientation*

ISEA/NEA Organization Political Leanings	Respondent Political Orientation		Liberals		Moderates		Conservatives	
	(N = 34)	Percent	(N = 136)	Percent	(N = 355)	Percent		
Liberal	21	61.0	112	82.0	340	96.0		
Moderate	8	24.0	18	13.0	11	3.0		
Conservative	5	15.0	6	5.0	4	1.0		

While some educators remarked that they could not say for certain what political orientation ISEA/NEA organization holds, many other respondents had more to say about ISEA/NEA's political leanings. One teacher said, "Unions seem to always be liberal or Democratic. They want the government to solve all the problems." One teacher went as far as to say, "Most teachers would say they are 'middle-of-the-road', but do not realize that they are actually supporting a very liberal, if not 'socialistic' agenda." Another teacher said, "I can't think of an area where they do not take a liberal stance."

One teacher was perplexed and said, "I'm not sure [ISEA/NEA] is even about educators. I think ISEA/NEA is an entity that is focused more on benefitting liberals and liberal agendas." But another teacher followed up by saying, "Politics should be the least of the concerns, except when it is a huge deterrent for the safety and equality of students and staff."

Alignment of members, leaders, and ISEA/NEA organization. The side-by-side analysis and comparison of perceptions held about member, leader, and organization political leanings is essential. It is important to distinguish between the perceptions held about the average ISEA/NEA member versus ISEA/NEA leaders and the ISEA/NEA organization as a whole. Table 55 summarizes these differences.

Table 55

*Respondent Beliefs: A Comparison*

ISEA/NEA Political Orientation	Average Member (N = 589)		ISEA/NEA Leader (N = 595)		ISEA/NEA Organization (N = 603)	
	Count	Percent	Count	Percent	Count	Percent
Liberal	246	42.0	492	83.0	513	85.0
Moderate	304	52.0	77	13.0	67	11.0
Conservative	39	6.0	26	4.0	23	4.0

Based on the perception of survey respondents, ISEA/NEA leaders closely align politically with the ISEA/NEA organization. But survey respondents also perceived a disconnect existed between the average member's political leanings and that of the

ISEA/NEA leaders and organization as a whole. Survey respondents believed the average member to be more moderate than ISEA/NEA leaders or the organization as a whole, with a difference of 39% and 41% respectively.

### Summary of Findings

This chapter examined the results of the data collected around the eight research questions. The summary of these results follows.

#### Bypassing ISEA/NEA Membership

Factors for educators bypassing ISEA/NEA membership were as follows: (1) cost of ISEA/NEA membership dues was too high, (2) ISEA/NEA political activity, (3) ISEA/NEA allocation of dues, (4) preferred an alternative organization, and (5) ISEA/NEA focus on non-education issues.

Additional factors impacting educator's choice not to join ISEA/NEA that reflected both statistical significance and were corroborated by respondent's commentary included: (1) connotation of ISEA/NEA as a labor union, (2) continued pressure to join, (3) labor union activities, (4) perception of support for poor teachers, and (5) perception of support for the status quo in public education.

There were many specific concerns related to ISEA/NEA political activity that emerged. The political activities of most concern from educators who opted not to join ISEA/NEA included: (1) perceived use of membership dues toward politics, (2) ISEA/NEA political candidate endorsements, and (3) social issues supported by ISEA/NEA.

Also, of those concerned about how ISEA/NEA dues were allocated, they reported ways in which they felt membership dues could be better spent. They would have preferred to see dues spent on: (1) local issues, (2) state issues, and (3) professional development.

Another key finding related to emotions. The top three emotions educators felt related to bypassing ISEA/NEA membership were: (1) guilt, (2), frustration, and (3) embarrassment.

#### Joining ISEA/NEA

Factors for joining ISEA/NEA were as follows: (1) liability and insurance protections, (2) pressure to join, (3) belief that they had no choice but to join, (4) belief that joining “is just something you do” and (5), support of the local union efforts. Notably and relevant to this study, the least common factor influencing former ISEA/NEA member’s choice to join was ISEA/NEA political activity.

#### Discontinuing ISEA/NEA

Factors for discontinuing ISEA/NEA membership were similar to those who opted not to join ISEA/NEA at all. The factors influencing discontinuing ISEA/NEA membership were as follows: (1) cost of ISEA/NEA membership dues was too high, (2) ISEA/NEA allocation of dues, (3) ISEA/NEA political activity, (4) preferred an alternative organization, and (5) ISEA/NEA focus on non-education issues.

Additional factors impacting educator’s decision to discontinue ISEA/NEA membership that reflected both statistical significance and were corroborated by

respondent commentary included: (1) dissatisfaction with ISEA/NEA leadership, (2) connotation of ISEA/NEA as a labor union, (3) perception of support for poor teachers, and (4) perception of support for the status quo in public education.

Related to ISEA/NEA political activity, the most common concerns from educators who discontinued their ISEA/NEA membership included (1) perceived use of membership dues toward politics, (2) ISEA/NEA political candidate endorsements, and (3) social issues supported by ISEA/NEA.

Again, similar to those who bypassed ISEA/NEA membership, of those who discontinued membership and were concerned about how ISEA/NEA dues were allocated, they reported they would have preferred to see dues spent elsewhere. These preferences included: (1) local issues, (2) state issues, and (3) professional development.

Another key finding related to emotions. The top three emotions experienced by former members as it related to joining or discontinuing ISEA/NEA membership included (1) frustration, (2) disappointment, and (3) guilt.

#### Former ISEA/NEA Member Awareness of ISEA/NEA Political Activities

By and large, former ISEA/NEA members were not aware of the full gamut of ISEA/NEA political activities. Specifically, 58% of former members were unaware of ISEA/NEA resolutions and 56% were unaware of non-education issues that ISEA/NEA promoted. Additionally, 60% of former members were unaware of the NEA political action committee, while 48% were unaware of ISEA/NEA political ties to the

Democratic Party. Lastly, 56% of former ISEA/NEA members were unaware of the organizational affiliations held by NEA.

Why former ISEA/NEA members were unaware can be attributed to two larger issues. The first relates to educators choosing not to be informed consumers. Alarmingly, 50% of respondents indicated they do not believe educators willingly research ISEA/NEA before or during membership, and another 46% believe educators do some research, but still do not know how dues are allocated.

Respondents indicated factors for being uninformed included: (1) a lack of time to research ISEA/NEA, (2) they did not care how they were being represented by ISEA/NEA, (3) they believed they had no choice but to join, so did not feel it was necessary to become informed, and (4) they believed joining was “just something you do” as an educator and that you do not question.

The second larger issue that emerged which shaped educator’s knowledge about ISEA/NEA is a perception of a lack of transparency on the part of ISEA/NEA. A vast majority, 64% indicated ISEA/NEA has minimal or no willingness to forthrightly educate prospective or current members about political activity. Specifically, educators on the whole believed: (1) union leaders were not transparent and half-truths were told, (2) a lack of information was provided by ISEA/NEA, (3) outside resources were required to learn about ISEA/NEA, and (4) ISEA/NEA leaders were too concerned about organizational self-preservation (e.g., keeping membership and dues up) that they were reluctant to share accurate information.



### Former ISEA/NEA Member Involvement with ISEA/NEA Political Activities

On the whole, former ISEA/NEA members were largely uninvolved with ISEA/NEA political activity. A key finding included that 61% of former members reported that they were uninvolved ISEA/NEA members and simply paid dues.

A vast majority, 81% of former members, reported they believed ISEA/NEA members with divergent viewpoints were not welcomed to participate or were not considered in political activities. Also, only 2% of former members believed they could influence the political activities of the ISEA/NEA.

Additionally, of former members who did not agree with the political direction of the ISEA/NEA, 52% dropped membership and 35% did nothing. A small fraction spoke up at meetings or worked to change policies. Lastly, 84% of former members indicated they gave no financial contribution to NEA PAC.

### Former ISEA/NEA Member Alignment with ISEA/NEA Political Activities

In addition to analyzing awareness and involvement with ISEA/NEA political activities, this study also measured the alignment former members reported with ISEA/NEA political activities. The vast majority, 68%, of former members indicated they did not believe ISEA/NEA non-education platform aligned with their personal beliefs and values, while 20% indicated they did not know if it aligned or not. In terms of political candidate endorsements, 82% of former members indicated the candidates endorsed by ISEA/NEA did not align with their own political leanings and affiliations. Additionally,

86% of former members indicated they did not believe the organizations that ISEA/NEA affiliated with represented the average member.

Most interestingly though, was the analysis of whether the average ISEA/NEA member, ISEA/NEA leaders, and the organization as a whole aligned. A disconnect emerged. With regard to members, 52% of respondents indicated the average ISEA/NEA members were moderate, while 42% believed the average member was liberal and 6% believed they were conservative. When examining the political orientation of ISEA/NEA leaders, 83% believe the leaders were liberal, while 13% believe they were moderate and 4% believed they were conservative. Similarly, when examining the political orientation of the ISEA/NEA organization as a whole, 85% believed the ISEA/NEA organization was liberal, while 11% believed they were moderate and 4% believed they were conservative.

#### Introduction of Chapter 5

Chapter 5 will provide another level of data interpretation through further discussion and implications of the data outlined in Chapter 4. Additionally, opportunities for further study will be identified and the conclusions of the study will be shared.

## CHAPTER 5

### DISCUSSION

The purpose of this mixed-methods study was to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join and discontinue ISEA/NEA or who bypassed ISEA/NEA altogether. Specifically, the study aimed to explore the factors that influenced their membership decisions. Lastly, the study further investigated the degree to which former ISEA/NEA members were aware, involved, and aligned with ISEA/NEA political activities and how the political activities influenced membership choices related to ISEA/NEA. To accomplish the goals of the study, mixed methodology was employed. The collection and analysis of both qualitative and quantitative data were of equal importance to the findings that emerged within the research.

In Chapter 4, the results of each research question were reported individually, reflecting both quantitative and qualitative data. Throughout Chapter 5, a recap of the theoretical framework that grounded this study will be shared. A more in-depth look at these findings in the context of a model will also be shared, which reflects the interconnectedness of the factors that emerged related to decisions about ISEA/NEA membership. The chapter will conclude with implications and recommendations for further study.

### Theoretical Framework

Three different theoretical frameworks grounded this research, which will be briefly explained. These include Cognitive Dissonance Theory, Cognitive Evaluation Theory, and Normative Social Influence. The application of these theoretical frameworks will be shared within the context of the upcoming discussion.

The first, Cognitive Dissonance Theory, reflects the idea that individuals innately desire harmony between attitudes, beliefs, and behaviors. When discrepancies among any of these factors emerges, dissonance or an internal conflict or feeling of being psychologically uncomfortable, occurs. When dissonance occurs, it may take the form of negative emotions (Cooper, 2007; Festinger, 1957).

The second theoretical framework, Cognitive Evaluation Theory, is concerned with what influences choice, and more specifically, the external or internal loci of control that influences those choices. Cognitive Evaluation Theory reflects how external factors and intrinsic motivation coincide when influencing choices (Deci & Ryan, 1985).

Lastly, Normative Social Influence focuses on the notion of conformity related to group social norms. These norms encompass what is common, normal, approved of, and socially sanctioned (Cialdini et al., 1991).

After analyzing the data collected and again determining how the three theoretical frameworks related to the data gathered, The Model of Decision Making was generated and will be introduced as part of the discussion and implication of findings.

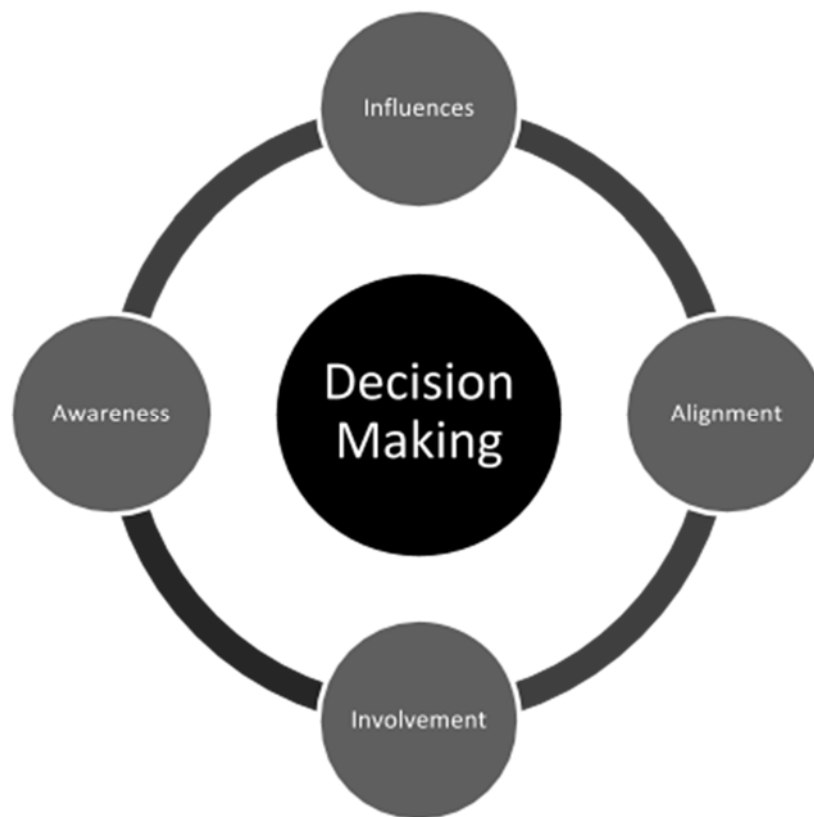
### The Model of Decision Making

Research questions 3, 4, and 5 centered on factors that influenced membership choices with respect to bypassing ISEA/NEA membership, joining ISEA/NEA, and discontinuing ISEA/NEA membership. Research questions 6, 7, and 8 focused on the degree to which former ISEA/NEA members were aware, involved, and aligned with ISEA/NEA political activities. The Model of Decision Making emerged from and best summarizes the findings and implications related to these research questions.

Through analysis of the data related to these research questions, the key factors influencing educator's decisions related to union membership emerged. The four categories of factors comprising The Model of Decision Making include awareness, involvement, alignment, and influences. Each of these four factors will be broken down with more specificity and further discussed in the upcoming sections. The factors will then be introduced within the context of The Model of Decision Making, which is reflected in general terms as seen in Figure 1.

It is important to note that each of these four categories of factors relates to the notion of internal or external influences, or loci of control, as termed within Cognitive Evaluation Theory (Deci & Ryan, 1985). Within this study, internal influences related to the decision maker themselves and considered such things as beliefs, morals, values, preferences, political persuasion, and emotions. External influences included those things peripheral to the decision maker and in the case of this study, largely tied to ISEA/NEA

priorities, activities, policies, and practices. It is also important to note that within the four primary categories influencing decision making, each may reflect internal or external factors.



*Figure 1.* The Model of Decision Making highlights the four categories of factors that impacted the membership choices of potential ISEA/NEA members.

### Awareness

Awareness of ISEA/NEA political activities is the first category of factors that will be discussed within The Model of Decision Making. Study participants were largely unaware of ISEA/NEA political activities and priorities. Specifically, many former members were unaware of the political activities that centered on ISEA/NEA resolutions describing their political and social platform, resolutions that seemingly were unrelated directly to education, ISEA/NEA Political Action Committee activities, ISEA/NEA political party alignment, and ISEA/NEA organizational associations. Three primary factors emerged related to former member's awareness of ISEA/NEA political activities.

ISEA/NEA transparency. The first factor that contributed to a lack of educator awareness about ISEA/NEA was the perception of a lack of transparency on the part of ISEA/NEA. Two-thirds of study participants believed ISEA/NEA had no or minimal willingness to forthrightly educate prospective or current member.

Within the notion of transparency, concerns emerged that local leaders may either be uninformed or were intentionally withholding information. Educators reported when they posed questions to ISEA/NEA leadership, the perception was that only half-truths were provided and that in general, information was not made readily available. Many educators reported receiving the "run around." Many of those who inquired felt compelled to seek external resources to gather information about ISEA/NEA, so much so that they needed to go around ISEA/NEA to gather information. Some educators reported however, that it may not have always been intentional to withhold accurate information,

but rather that many of the local union leaders themselves were not as informed as they should have been and were thus unable to respond sufficiently to queries.

Lastly, the perception existed that ISEA/NEA leaders operated in a self-preservation mode, with a focus of increasing memberships and associated revenue. Some study participants believed that ISEA/NEA leaders were reluctant to share information about political activities and dues allocation because it may decrease membership and revenues.

Informed educators. A lack of awareness on the part of educators does not lie solely with ISEA/NEA's perceived lack of transparency. It became apparent that study participants did little to become informed consumers. Many educators self-reported they opted not to research ISEA/NEA to a large degree.

Educators in this study, identified many barriers to becoming better informed about ISEA/NEA. A lack of time or a lack of priority was most prominent as a rationale for not becoming well-versed in the ISEA/NEA. Some believed they did not have a choice in joining and thus, believed time spent researching was fruitless. Others simply did not care and chose not to be informed. Additionally, others reported they trusted an educational organization they believed would be looking out for their interests as an education professional.

When participants were asked if educators inform themselves *and* ISEA/NEA was transparent and willing to share information with prospective members, only 2% of all study participants believed that both took place. Reaffirming this notion is that many study participants admitted they themselves did not do due diligence to understand how

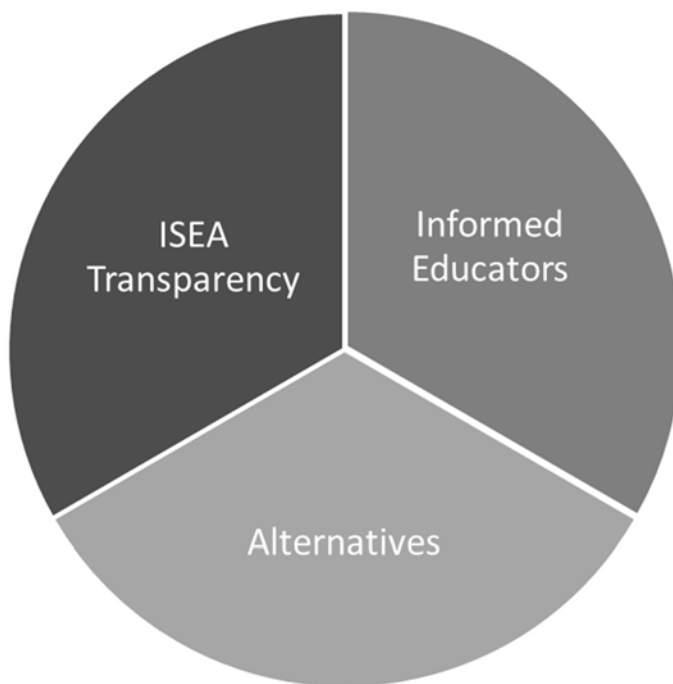


ISEA/NEA would be representing them. If 98% of prospective and current educators are uninformed about ISEA/NEA for these two reasons, it is of great concern.

Alternatives. Ill-informed educators, coupled with the perception of a lack of transparency on the part of ISEA/NEA led educators to also be unaware of the alternative professional organizations available to them in Iowa. Many educators were not knowledgeable of the legal implications of Right-To-Work in the State of Iowa. This is evidenced by the number of educators in this study who joined ISEA/NEA because they believed they had no choice. Figure 2 highlights the three factors that impact the awareness educators held about ISEA/NEA political activities.

Normative Social Influence reflects how the pressure to conform influences one's choices (Cialdini et al., 1991; O'Reilly & Caldwell, 1985). Many study participants admitted that they were not well-informed and caved in to perceived pressure to join ISEA/NEA.

As defined within Cognitive Dissonance Theory, individuals innately desire harmony between attitudes, beliefs, and behaviors. When discrepancies among any of these factors emerges, dissonance, or an internal conflict or feeling of being psychologically uncomfortable, occurs. As former ISEA/NEA members became increasingly aware and realized that their values and beliefs may not be endorsed or supported by their professional organization, dissonance emerged and many members experienced an array of emotions, such as disappointment, anger, or embarrassment (Cooper, 2007; Festinger, 1957). But more than the emotions, dissonance often led to those educators discontinuing membership.



*Figure 2.* Awareness. The Model of Decision Making highlights three aspects influencing the level of awareness educators possessed about the ISEA/NEA political activities.

### Involvement

Involvement with ISEA/NEA membership and political activities was the second category of factors that will be discussed within The Model of Decision Making. Former ISEA/NEA members were minimally engaged with ISEA/NEA political activities. Four primary factors emerged related to a lack of involvement with ISEA/NEA political activities. These factors included a lack of (1) engagement, (2) impact, (3) contributions, and (4) divergent viewpoints.

Lack of engagement. The majority of former members readily admitted that they were largely uninvolved with ISEA/NEA during their membership, while only 8% indicated they were in activist or leadership roles. As Hurd suggested, “Typically those workers who are most adamantly pro-union take the lead in organizing the campaign” (2000, p.9). Farkas et al. (2003) confirmed that thinking by saying, “Other than receiving mailings and notices, [most members] aren’t involved with their local union” (p. 18). As NEA Fund leaders contended, “We ask for help, and get ‘no’ or silence for our answer. Sometimes we call this ‘apathy’ and even blame members for not caring about what we care about” (National Education Association Fund, 2011a, p. 16). If ISEA/NEA leaders believed their own membership does not care about the priorities ISEA/NEA has put forward, then it seems to be acknowledging what many perceive as incongruence and mismatched representation of members.

Impact. Only 2% of former ISEA/NEA members believed they could influence the political activities of ISEA/NEA, which ties back to the union poll in which 51% of members believed “Union decisions are made by a small group of deeply engaged veteran teachers and staff” (Farkas et al., 2003, p, 18). As Salvato (2004) suggested, there is no recourse for educators who are not aligned with NEA’s liberal policies other than to become disenfranchised. Many educators who were formerly part of ISEA/NEA reiterated Salvato’s sentiments. When they were concerned about the political course of ISEA/NEA, former members typically responded in one of two ways. On one end of the spectrum, they simply did nothing and on the other end of the spectrum, they dropped

membership with the union. Very few educators who felt unrepresented, increased involvement with ISEA/NEA or worked to change ISEA/NEA policies from the inside.

Contributions. In terms of involvement with NEA PAC, 84% of former members indicated they gave no contribution to NEA PAC. Again, these findings reiterate the concern shared by NEA leaders when they say, “Two thirds of NEA members responded that they wanted their association to be involved in politics. Still, most members will still have little or no history making political donations” (National Education Association Fund, 2011a, p. 18).

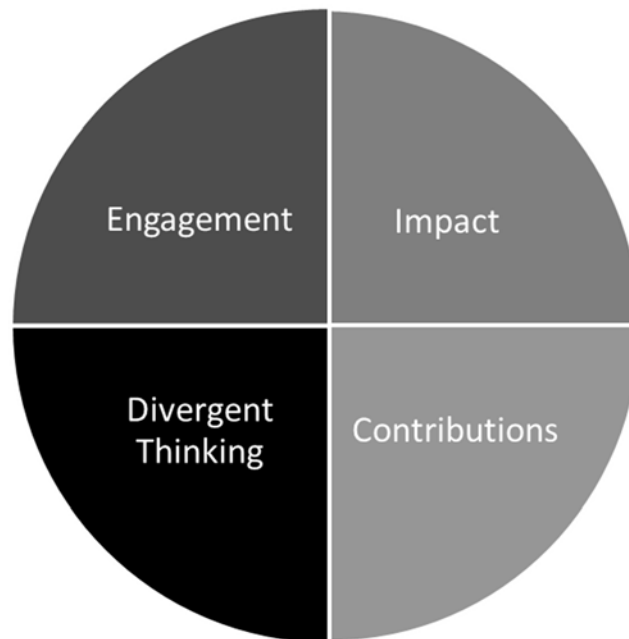
As NEA former General Counsel Robert Chanin’s said, “... You won’t collect a penny from these people, and it has nothing to do with voluntary or involuntary. I think it has to do with the nature of the beast, and the beasts who are our teachers... They simply don’t come up with the money regardless of the purpose” (Lieberman et al., 1994, p. 57). Chanin later went on to say, “Getting permission from teachers for the union’s political activity each year is a royal pain in the ass” (Richards & Harsh, 2004, p. 10).

The study participants identified political activity as the last factor for joining ISEA/NEA, as well as a primary reason to bypass or discontinue ISEA/NEA. The quotes from ISEA/NEA leaders, the history, and the context provided by ISEA/NEA themselves gives affirmation to what many of these former ISEA/NEA members believe. But the concerns expressed by former ISEA/NEA members reverberate across the country and do not only hold true in Iowa. On the NEA Fund website, current members openly shared a list of common objections to ISEA/NEA politics and the lack of targeted focus on education (National Education Association Fund, 2011a).

Divergent viewpoints. One explanation for a lack of involvement or attempted influence may be that 81% of former members believed that members with divergent views were not welcomed to participate. If they believed they were part of the membership with divergent viewpoints, they felt unheard and marginalized.

The former members who believed divergent viewpoints were not welcomed, cited that politics played a key aspect in a lack of accepting diverse viewpoints. They reportedly felt that ISEA/NEA towed the Democratic Party line and ISEA/NEA leaders and some members were not open to other political ideologies, ideas, or candidates. As Richards and Harsh (2004) suggested, those marginalized educators felt they were being charged for workplace representation, but were then subjected to an unrelated political agenda with which they did not agree. Figure 3 reflects the factors impacting involvement with ISEA/NEA.

Normative Social Influence Theory focuses on the notion of conformity related to group social norms (Cialdini et al., 1991). In this study, many educators felt that they were not heard or valued beyond their membership dues. They felt pressure to comply because that is just what good union members do, which reflects the group of members that NEA refers to as those that “get it.” Again, NEA identifies those who “get it” as “the members who love their association and who are on board with its legislative and political program fully, regardless of the issue,” “politicos,” and “those who identify as progressives” (National Education Association Fund, 2011a, p. 31).



*Figure 3.* Involvement. The Model of Decision Making highlights four aspects related to former member's level of involvement in ISEA/NEA political activities.

### Alignment

Alignment with ISEA/NEA political activities is the third category of factors that will be discussed within The Model of Decision Making. Alignment between ISEA/NEA and former and potential members was a primary focus of study. Former or would-be ISEA/NEA members largely indicated that they were not aligned to the ISEA/NEA political activities, which played a primary factor in their discontinuing membership or not joining at all.

Most former members believed the ISEA/NEA political activities and platform did not align with their beliefs, morals, and values, which related largely to ISEA/NEA's focus on non-education issues, political candidate endorsements, and organizational affiliations. With the perception that ISEA/NEA held a liberal political agenda, many moderate and conservative educators felt marginalized and underrepresented. An array of emotions emerged for those educators faced with decisions about ISEA/NEA membership.

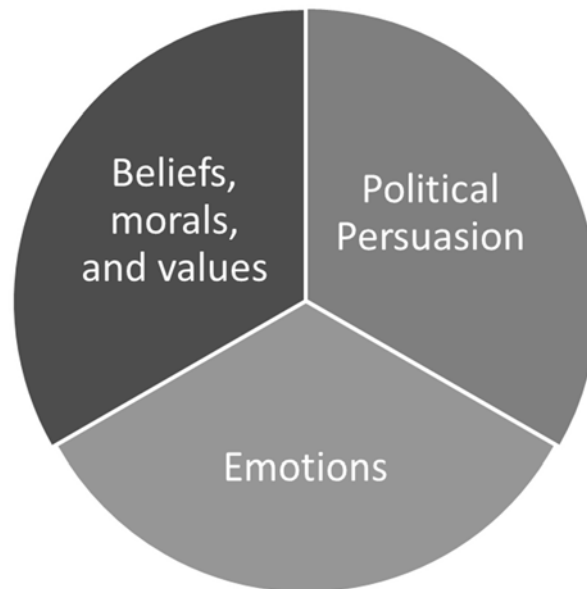
Member, leader, and organizational political orientation. Study participants were also asked to compare their perspectives on the political orientation of the average ISEA/NEA member, ISEA/NEA leaders, and the ISEA/NEA organization. To recapitulate, 52% of respondents believed the average ISEA/NEA member was moderate, while 42% believed the average member was liberal, and 6% believed the average member was conservative.

Comparatively, when considering ISEA/NEA leaders, 83% of respondents believed leaders were liberal, while 13% believed leaders were moderate, and 4% believed they were conservative. Similarly, when considering the ISEA/NEA organization, 85% believed the ISEA/NEA organization reflected a liberal ideology, 11% believed it reflected moderate ideology, and 4% believed it was conservative ideology. To summarize the comparison, ISEA/NEA leaders are believed by most in the study to closely align politically with the ISEA/NEA organization. It appears however, that the average member is more moderate than either the ISEA/NEA leaders or the organization as a whole.

The discrepancy was also apparent in the perceived disconnect that appeared between average members and the ISEA/NEA leaders and organization. In the 2006 *Status of the American Public School Teacher* survey by the NEA, 55% of teachers considered themselves “conservative or tends to be conservative” while 45% identified themselves as “liberal or tends to be liberal.” Additionally, NEA educators have reported themselves as politically conservative over politically liberal in every survey since 1971 (National Education Association, 2006). Even with over half of the NEA members self-reporting their conservative political leanings, the political agenda of the ISEA/NEA remains largely liberal and non-representative of all ISEA/NEA members. Figure 4 highlights the factors that impacted the alignment between educators and ISEA/NEA political activities.

Cognitive Dissonance Theory directly relates to the alignment that study participants desired. They desired a harmonious state between their attitudes, beliefs, and behaviors and those of organizations representing them (Cooper, 2007; Festinger, 1957). In the case of potential members who opted not to join ISEA/NEA, guilt, frustration, and embarrassment were commonplace. For those who joined but later discontinued ISEA/NEA, frustration, disappointment, guilt, and anger were commonly expressed emotions.





*Figure 4.* Alignment. The Model of Decision Making highlights the three aspects related to alignment with ISEA/NEA political activities.

### Influences

Influences related to ISEA/NEA membership is the fourth category of factors that will be discussed within The Model of Decision Making. Cognitive Evaluation Theory reflects that many factors influence the choices one makes, which applied to ISEA/NEA membership decisions (Deci & Ryan, 1985). Various external and internal influences played a part for those who bypassed ISEA/NEA, joined ISEA/NEA, or discontinued ISEA/NEA membership.

Joining ISEA/NEA. The factors influencing membership decisions to initially join ISEA/NEA paint an interesting portrait of both educators and the ISEA/NEA organization. The top factor influencing 73% of former ISEA/NEA member's decision to join was the desire for insurance/liability protections offered by ISEA/NEA. In what is perceived as today's litigious society it is indeed important to have ample protection. And for many who believed their districts would not protect them in the case of an arising legal issue, they took matters into their own hands. Many study participants believed joining ISEA/NEA for insurance/liability protection was the lesser of two evils when considering many expressed they compromised their own values to do so. For some, being practical overshadowed the political, as they acknowledged that legal protections outweighed their own objections to ISEA/NEA political activity.

But from an organization representing educators that purportedly desires a sense of professionalism in its members, one has to wonder if liability insurance is what ISEA/NEA wants to be best known for. If ISEA/NEA leaders see their union as a professional association, it should be disconcerting that the primary reason for joining is self-protection, which seems far removed from the ideal of professionalism.

The three remaining top factors impacting educator's choices to join ISEA/NEA also do not reflect professionalism or commitment to public education. In fact, the second factor, "I felt pressure to join" was reported by 45% of former ISEA/NEA members. Many who joined did so because they were giving into the pressure they felt. With nearly one half of respondents joining due to pressure, it is reasonable to wonder if the perceived

pressure is a reflection of a de-professionalized educational atmosphere where individuality is sacrificed for collectivity.

The third factor, “I believed I had no choice,” cited by 45% of former members, is reflective of educator’s lack of knowledge about the Right-to-Work laws prohibiting forced unionization in the State of Iowa. Most educators do not know about Right-to-Work and felt compelled to join, which may be due to direct messages shared by ISEA/NEA leaders, subtle encouragement, or just simple misunderstanding on the part of educators. Regardless of the reasons, a concern emerged that educators were not well-informed of a law providing freedom of choice in Iowa. But they were also not aware of other professional association alternatives available to them.

The fourth reason, “Joining is just something you do,” was cited by 42% of former ISEA/NEA members and reflects a lack of thoughtful decision-making for joining a professional organization. Many newer educators joined because veteran educators suggested that joining is “just what you do” as an educator and that one does not ask questions. In many cases, educators were told they are the only ones in the building who did not belong to the union. Because many educators were reportedly ill-informed and did not realize that others have opted out of ISEA/NEA, they blindly joined under the guise of “everyone is doing it.”

Lastly, the fifth reason for joining provides a more rational approach for joining an organization. Many educators joined because they wanted to support the local union’s efforts, which typically centered on the collective bargaining provided by local union leaders.

When considering the collective nature of the top five factors influencing participants decision to join ISEA/NEA, the rationale is disheartening. What is telling perhaps is not so much why they reportedly joined, but the factors that were not influencing their decisions to join. It was not that former ISEA/NEA members largely valued the contributions of the union toward improving public education, nor was it that professional resources were key to effectiveness as an educator, or that they valued ISEA/NEA's drive to protect students. Rather, what urged educators to join is that they were pressured, they believed they had no choice, and they went along with the "it's just what you do" line of thinking. It is disconcerting that these were some of the key factors influencing the decisions for joining the teachers' union in Iowa.

Of the remaining factors that influenced joining, additional observations are worthy of discussion. It is curious that 39% of former members joined to support the local union and only 7% of former members joined to support state and national union efforts. Yet, during the 2013-2014 school year, the average member paid \$669 toward state and union dues (National Education Association, 2013a). Of that \$669, 27% was allocated to the NEA and 73% was dedicated to ISEA.

Most notably, the least common factor in joining ISEA/NEA was to support the union's political activities. Only 2% cited political activity as a factor for joining, yet so much of what ISEA/NEA does and expends in the way of resources is political in nature. More importantly and as reflected in the detailed analysis in Chapter 4, ISEA/NEA political activities are actually one of the top three reasons why educators discontinued membership and bypassed membership altogether.

Normative Social Influence Theory was also reflected with study participants when considering the factors related to joining ISEA/NEA. Normative Social Influence reflects that compliance with group norms is expected (Cialdini et al., 1991). In the case of those joining, educators in this study reported there was significant external pressure to join ISEA/NEA. Additionally, potential members were told messages like joining “is just what you do,” and many were led to believe they had no choice but to join ISEA/NEA. These three factors alone tied to the social norms put forth by labor unions.

Discontinuing and bypassing ISEA/NEA membership. It is notable that the top five factors for educators to both discontinue ISEA/NEA membership and bypass membership are exactly the same. These include cost of membership, allocation of membership dues, political activities of ISEA/NEA, desiring an alternative organization, and a perceived focus on non-education issues. It is arguable that these top five factors that have turned educators away are a direct reflection on the priorities of ISEA/NEA that may not be representative of their membership or education in general. The five factors for disengagement with the teachers’ union will be recapped in more detail below.

Cost of membership was the number one factor for discontinuing membership or bypassing membership. The rates for local membership were not readily available and are presumed to vary between locals. Study participants agreed that the cost of membership did not outweigh the benefit.

Another top five factor for discontinuing ISEA/NEA or bypassing membership tied directly to membership dues, but was centered on how those membership dues were allocated. Concern emerged as to how dues were spent to advance a political or social

agenda with which would-be members did not align. Study respondents largely believed dues should be limited to local and state level issues directly tied to education. Most notably, only 6% of former members and 10% of those who bypassed ISEA/NEA believed dues should be allocated to political activity at all.

ISEA/NEA political activity was the last factor that former members cited for joining ISEA/NEA. Yet, it was the second factor for those who bypassed ISEA/NEA membership altogether and the third factor for those who opted to join ISEA/NEA and discontinue membership. Study participants indicated that political activity is both a deterrent to joining and a factor in discontinuing and bypassing membership. Yet so much of the activity ISEA/NEA engages in is political in nature and seemingly removed from the interests of the local classroom. However, what was bothersome to many study participants, was not only that ISEA/NEA was involved in such large-scale national and state level politics, but also that the political activity was so partisan in nature.

That said, some might argue that partisanship is just a given in politics today and that the partisanship has transcended into public education like it has many other facets of our culture. For ISEA/NEA however, it might also be considered a lifeline to have that reciprocity with one political party.

When further analyzed, would-be members indicated use of membership dues toward politics was the primary political factor bothersome to them. However, concern also emerged related to political candidate endorsements, social issues supported by ISEA/NEA, and political party affiliation. While resolutions/platform and organizational

affiliations were indeed of concern to some would-be members, it was less of a concern than the other areas of political activity mentioned above.

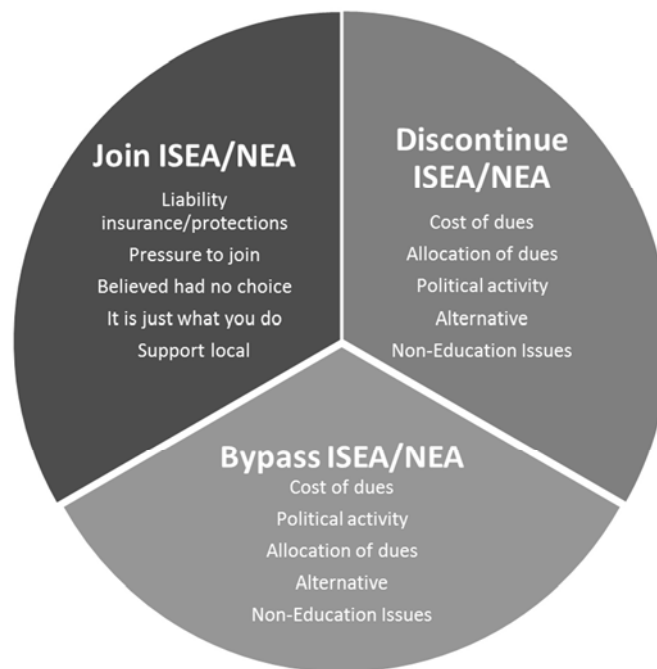
Study participants valued the choice to belong to another organization. Both former members and those who bypassed ISEA/NEA indicated that the choice to join an alternative organization was important to them and was a factor in their ISEA/NEA membership choices. Iowa educators are fortunate in that they are protected by Right-To-Work laws that prohibit forced unionization or the collection of fair share fees. Yet when one examines why educators who did not want to join indeed became part of the ISEA/NEA rank and file, two primary reasons emerged. Many study participants admitted they did not realize they had a right to a choice in Iowa as a public educator, but also many were unaware of the alternative organizations available to them.

A perceived focus by ISEA/NEA on issues not directly tied to education ranked as the 5<sup>th</sup> factor influencing membership choices for both former members to discontinue ISEA/NEA and for those who bypassed ISEA/NEA membership altogether. Again, a focus on non-education issues is tied to two other top five factors including how dues were allocated and political activities of ISEA/NEA.

Some educators believed that some of the issues ISEA/NEA weighed in on or contended with are indeed tangentially related education and should be considered a priority. However, many others in this study believed ISEA/NEA's focus on issues not directly tied to the classroom is a distraction from what matters most- students. Many educators argued that the platform is so vast, that the focus on things directly impacting education is watered down or lost in the fray.

Another concern tied to the focus on non-education issues was the perception of the ISEA/NEA putting educator's priorities over the needs of students. As noted in Section F of the *2013-2014 NEA Resolutions: Protect the Rights of Education Employees and Advance Their Interest and Welfare, and Promote, Support, and Defend Public Employees' Right to Collective Bargaining*, many of the 365 resolutions, policies, and actions are focused on protections for educators (National Education Association, 2013a). Study participants perceived that the ISEA/NEA is actually so focused on the protections of educators that it promotes the status quo and detracts from student needs in public education. They largely advocated for the ISEA/NEA to re-engage as a public education champion, with a strict focus on students, learning, and achievement. The three sets of influences that impacted membership choices are reflected in Figure 5.





*Figure 5.* Influences. The Model of Decision Making highlights the top factors that influenced membership choices to join ISEA/NEA, discontinue membership with ISEA/NEA, or bypass ISEA/NEA all together.

#### Summary: The Model of Decision Making

In summary, many factors reportedly influenced the membership choices educators made related to bypassing ISEA/NEA membership, joining ISEA/NEA, or discontinuing ISEA/NEA membership. Although political activity was not a key factor in joining ISEA/NEA, it was certainly a predominant factor for bypassing or discontinuing.

It should also be noted that many of the factors influencing joining were external in nature, meaning they were peripheral to the decision maker and relative to the study,

largely tied to ISEA/NEA priorities, activities, policies, and practices. Conversely, many of the factors that influenced educators to bypass or discontinue ISEA/NEA were internal in nature, meaning they related to the decision maker themselves and considered such things as beliefs, values, preferences, political persuasion, and emotions. Figure 6 highlights the entire decision making model with each of the four factors and subcategories.

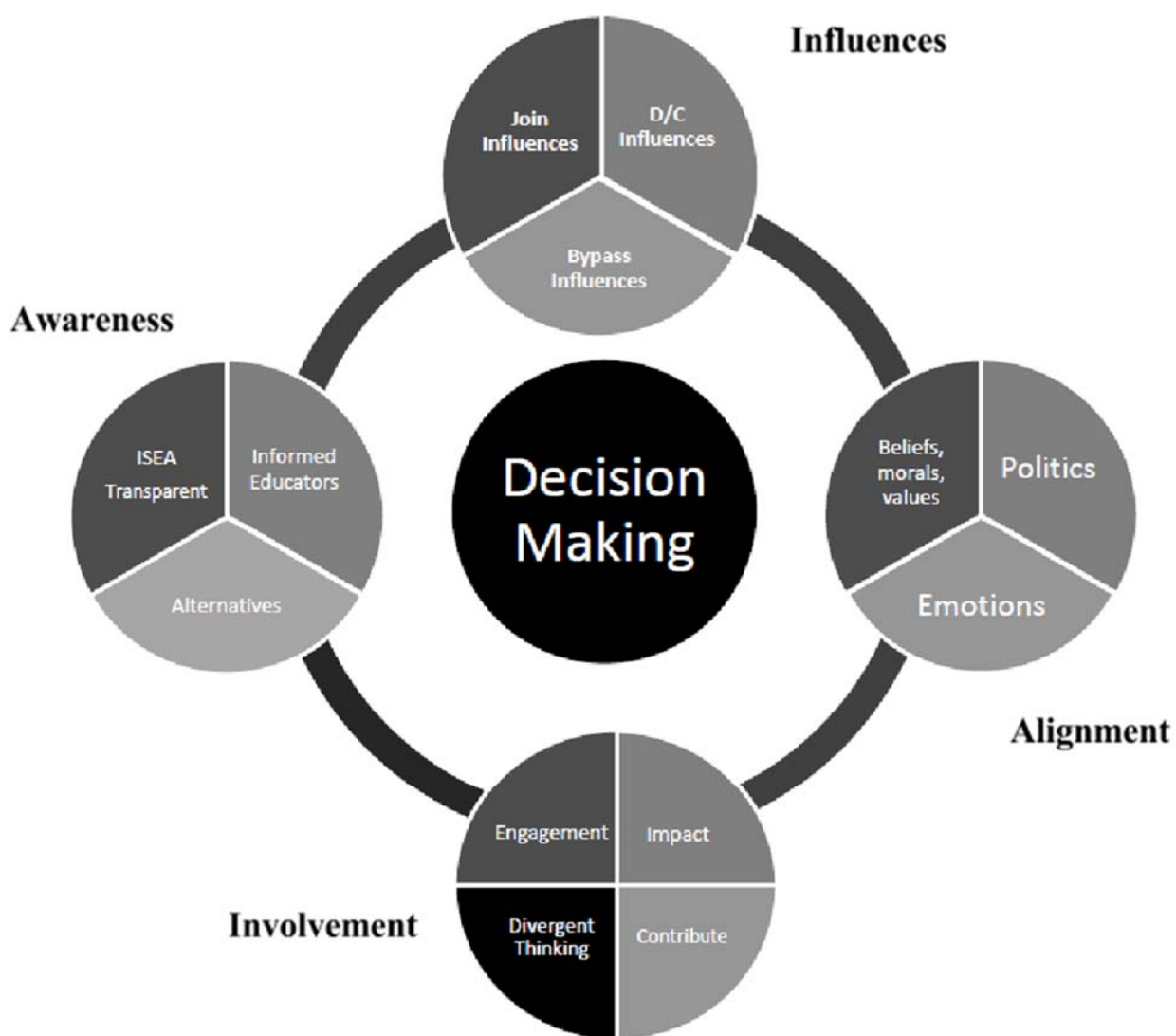


Figure 6. Expanded: The Model of Decision Making.

### Implications

As Moe (2011) contended, “The teachers unions have tremendous influence over the nation’s schools, yet they have been poorly studied” (p. 18). This research sought to contribute to the small body of knowledge about teachers’ unions. The implications of these findings will be shared in the context of key education constituents, including: (1) educators, (2) higher education teacher education programs, (3) Professional Educators of Iowa, (4) Right-To-Work advocates, and (5) collective bargaining champions and opponents. Additionally, these implications will be followed by an expanded section related to the ISEA/NEA.

### Educators

Well-informed consumers. Educators are touted to be lifelong learners. With that in mind, it is assumed that they are well-informed consumers of information. However, as it relates to making informed choices about ISEA/NEA membership, many study participants were clearly in the dark and may have remained there purposely. Over half of study participants who were former ISEA/NEA members admitted to a lack of awareness about resolutions, non-education issues, NEA’s PAC, political party affiliation, and organizational affiliations. Many of these educators assumed that ISEA/NEA would not only help educators, but would also help students and public education. Many admitted caving to perceived pressure to join because they did not want to make waves, they did not feel equipped to counter why they would not join, they did not inform themselves about ISEA/NEA membership, or because circumstance dictated they join.

Many former members passively joined ISEA/NEA, an organization that is shaping education in a way that may be counter to their professional, personal, and political proclivities. They simply paid dues and relished in the fact they had liability protections. For many educators, ISEA/NEA was the right fit for them professionally during their membership.

But for other former members, ISEA/NEA was not what they expected, ISEA/NEA was not what ISEA/NEA leaders had purported, and ISEA/NEA did not align with their personal values and political beliefs. But clarity did not come readily. It came over time, sometimes after they realized others did not belong to ISEA/NEA, despite being told they were the only one in their building that did not belong. It came after they made observations and started to pay attention to how ISEA/NEA represented them. It came after they started doing their own investigating and asking questions about how dues were spent and how they were being represented. It was then that many educators realized that membership to ISEA/NEA was not right for them and ultimately discontinued membership.

The study findings indicated a need for educators to be informed, politically enlightened, and understand how ISEA/NEA both represents their personal and professional inclinations, but also how ISEA/NEA advances education. The findings do not suggest that educators should flee ISEA/NEA, as it assumed that many who join and remain members are indeed aligned with the political activities and support the mission of ISEA/NEA. However, there are a good number of educators who, as they find out more about ISEA/NEA, decide ISEA/NEA may not be a match for them.

Like many large organizations or the political parties themselves, ISEA/NEA has the opportunity to take advantage of uninformed educators. They may be easy to sell memberships to, but may not necessarily create a strong ISEA/NEA membership. While uninformed educators may supplement the membership ranks and fill the coffers, there is a lack of substance to what should be present in a professional organization.

Even as acknowledged by NEA leaders, there is a faction of members who are underserved and underrepresented, which may support the perception that NEA is largely a political entity that does the talking for individuals without regard to their stance on the issues. But more distinctly, it may suggest that educators allow ISEA/NEA to be their voice whether they agree with the platform and messages or not. A key implication for these educators who continue with or consider ISEA/NEA membership is not to be one who blindly aligns, but rather strives to be fully informed and aware of how they are represented.

Political engagement. Study participants expressly desired to have education seen as a profession and to be part of a professional organization. Most professions are not unionized, but are still involved in some political discourse and activity that shapes their profession. However, study participants desired for ISEA/NEA to back off the political scene. Some degree of concern emerges when educators want a professional association to be totally disengaged from politics. It is likely naïve and unrealistic to think that ISEA/NEA could be completely disengaged from politics, especially given what is arguably the most politicized period in education history with the federal government playing a larger role than ever.

A preference for ISEA/NEA disengagement from politics may however be reflective of a greater trend toward a lack of involvement with politics in general and not just the desire for ISEA/NEA to be uninvolved with politics. Only one third of study participants indicated they were moderately or actively engaged in politics in general. Educators may be becoming more disengaged because of union politics, but it behooves us to wonder if that will be at their own peril.

There are many public education proponents, such as educators, parents, and policy makers, who believe there are many opportunists willing to impose their will on public education. These opportunists may include ambitious politicians, big business, or others with self-interest, who label themselves as reformers. Both groups, who have representation from both sides of the political aisle, purportedly have the intention of improving public education (Ravitch, 2014).

Perhaps it is important to consider that ISEA/NEA does play a crucial role in advancing education, if nothing else, than to prevent the influx of those opportunists set on impacting public education in an adverse way. But ISEA/NEA must be more than a stopgap to the opportunists having their way in public education. Perhaps there is political middle ground, in which ISEA/NEA tempers their political activity in a way that has them acting and seen as a public education reformer, laser-focused on doing what is best for students and achievement, versus what is best for recruitment, membership, and the union coffers. Perhaps the teachers' unions have a role as both a protector and advancer of public education- not just educators. Study participants largely doubt that is possible, but would love to embrace it.

Another implication is for Iowa educators is to not bury their heads in the sand about politics. It is crucial that educators are informed about the political landscape and context that is influencing Iowa and the nation's public education.

Liability insurance. Lastly, the primary factor for joining ISEA/NEA as indicated by study participants was the desire to have liability insurance in case the need for legal protections ever arose. Nearly three quarters of former ISEA/NEA members reported that they joined ISEA/NEA initially for the liability insurance, despite the ISEA/NEA political activities not reflecting their personal values and political beliefs. If membership to a professional association or union is not a driving factor for educators, they are encouraged to explore the purchase of liability insurance in the private market.

#### Teacher Education Programs

Teacher education programs are integral to the future of education, as they identify and prepare our next generation of educators. While a small percentage of former ISEA/NEA members indicated they simply continued their student membership from pre-service educator status to working in the field, many educators noted that ISEA/NEA was the only professional association option presented to them during their pre-service program at the university.

Study participants indicated they preferred choice, which was evident in that one of the top five reasons for discontinuing or bypassing ISEA/NEA was the desire for an alternative organization. Providing new educators with the knowledge of multiple professional membership options is a service that is long overdue and should be an expectation of any teacher preparation program. New and uninformed teachers should not

feel railroaded into joining a teachers' union because they believe that is their only option. If the alternative to promoting multiple associations for pre-service teachers does not seem desirable, it might be worthy of consideration that no endorsements of any association or union be introduced or advocated.

Additionally, it is important for new educators to have a clear sense of the political context related to public education across the nation, but also within Iowa. As explained in Chapter 1, Iowa's political landscape alone is unique and Iowa educators should be aware of that context. Also, it is important to understand the national political scene, how it impacts public education across the nation, as well as the trickle-down effect locally.

Without indoctrinating them politically in a partisan fashion, it would be a great service to help new educators understand the ramifications of Iowa's highly politicized education climate, as well as who the key players in public education are and their incentives for involvement. Teacher education programs may be the venue to help educators become astute, participatory citizens who are aware of these key contextual factors, processes, and resources for navigating a highly politicized public education field.

### Professional Educators of Iowa

Although this research was not directly about PEI, as an alternative organization to the teachers' union, PEI has much to gain from the findings that emerged. When considering that the PEI membership is represented entirely of those who either



discontinued membership with ISEA/NEA or those who never joined in the first place, they have the opportunity to benefit from the insights shared by their current member.

Just as ISEA/NEA needs to consider the many factors influencing membership decisions, the same holds true for PEI. One of the primary factors for discontinuing or bypassing ISEA/NEA membership stemmed from the union's decidedly partisan political activities. Study participants made it clear that they did not want to be part of a teachers' union or professional association engaged in such partisan politics and the same holds for their PEI membership. PEI members appreciated that PEI is focused on state-level education issues, does not endorse political candidates or parties, is not engaged in issues on the periphery of education, and that the results of member polling guide PEI's state-level education agenda. They also expressed appreciation for the lower dues, perceived better benefits, and the strict focus on state-level education most important to their members.

It became clear from study participants that PEI will need to hold true to the values in which the organization was founded to continue to grow its membership ranks. These foundational elements included: (1) a focus on students first, (2) support for Right-to-Work and freedom of choice, (3) character education, (4) professional negotiations with free and open discussion, (5) personalized education programs for students, (6) the belief that public service is a public trust, (7) employees involvement with policies affecting them, (8) good teachers and schools go hand-in-hand with a successful democracy (Professional Educators of Iowa, 2011c).

But also, it is of necessity for PEI to continue to support and represent a growing array of members and continue to identify ways to help educators see PEI as a viable alternative for educators. The optional feedback provided by survey respondents indicated a high degree of support for the follow up PEI has done for members in their respective districts or related to individual issues. Concern was expressed however, that members feel like more educators should benefit from the reaches of PEI. They believed PEI would grow exponentially if the organization had a way to supply educators around the state with more information, as well as more outreach staff to be present in districts. That said, it is acknowledged that the local union leaders and sometimes district administration, may impede access to educators.

#### Right-to-Work Advocates

Many Iowa educators are unaware of the state's Right-to-Work legislation that provides them the power to choose to join or not join a union at their discretion. However, many study participants believed they were required to join the teachers' union. Whether that false thinking can be attributed to overt messaging from ISEA/NEA that membership is required, subtle messages coupled with pressure to join, or just a lack of initiative and information seeking on the part of educators, more must be done to provide accurate information to educators in Iowa about their rights.

Right-to-Work advocates must capitalize on the recent Gallup (2014) findings that transcended party lines, in which 71% of Americans supported Right-to-Work. Advocates for Right-to-Work must not be wishful in their approach to informing Iowa

educators, but be more concerted and intentional in their efforts to inform educators about their rights related to union membership.

### Collective Bargaining Champions and Opponents

D'Amico (2010) suggested, rather than redefining education as a profession, through the teachers' union, teachers historically appealed to traditional labor constructions as a way to bolster authority and stature. One such aspect of bolstering authority and stature is collective bargaining.

The Collective Bargaining Law, Chapter 20, Code of Iowa is legal and optional for all public schools. Contrary to what is commonly touted by unions, under federal and state laws, unions have always had the option to negotiate "members-only" contracts, but most have opted to impose monopoly bargaining on the bargaining unit (National Institute for Labor Relations Research, 2008). "When unions represent nonmembers, it is a choice they made by electing to be the exclusive [bargaining] representative. Federal Law permits unions and employers to engage in non-exclusive collective bargaining for union members only" (National Alliance for Worker and Employee Rights, 2005).

In essence, when choosing to represent all eligible employees through monopoly bargaining, the teachers' union then has sole power to bargain with school officials, meaning that non-union employees are represented by a union and have no say in how or whether the union represents them or their interests (Herman & Herman, 1998; National Institute for Labor Relations Research, 2008; National Right-to-Work Legal Defense Foundation, 2008). Monopoly bargaining minimizes competition at the bargaining table and reinforces the notion that individuals lose the right to bargain for themselves

(National Institute for Labor Relations Research, 2008). Monopoly bargaining also ensures a level of security for unions that concessions are made by employers that meet the union's self-identified interests.

For those educators who are not part of the union, monopoly bargaining ensures that they receive the same benefits as union educators. For some non-members they appreciate the representation and acknowledge the work of the teachers' union to bargain on their behalf. However, other educators, may not appreciate being tied to the outcomes of bargaining handled by a union to which they do not belong and would like to have the opportunity to negotiate for themselves.

Regardless of which side of the fence the non-members fall on the issue, because ISEA/NEA has chosen monopoly bargaining for all who are eligible in a bargaining unit, ISEA/NEA is then dually responsible to communicate to all non-members about the process and outcome of negotiations. Yet, many educators in this study who are not part of the union and are subject to ISEA/NEA bargaining within their district claim little to no communication is provided.

As seen in the study findings, many educators do not necessarily want to be represented by ISEA/NEA in negotiations, but are at their mercy because of the ISEA/NEA's quest for monopoly bargaining. That said, ISEA/NEA also believe non-union members should pay their "fair share" to cover expenses incurred for negotiations and representation (National Education Association, 2014c). Non-members would argue that because ISEA/NEA has chosen monopoly bargaining, non-union educators should not be forced to pay a fee for a service they did not choose.

A solution that ISEA/NEA should proactively consider is negotiating “members only” contracts, which frees the ISEA/NEA of the perceived burden of the non-members, but also allows those who do not see value in ISEA/NEA’s representation and negotiations a different course of action for their contract negotiations. If ISEA/NEA leaders are confident in their ability to negotiate a better contract for their members, then they should welcome the opportunity to be free of the non-members as they go it alone.

Non-union educators perceive that they do not have a choice as to whether they are represented under monopoly bargaining, but then report being chided for choosing not to join ISEA/NEA and receiving the benefits of monopoly bargaining. Regardless, if ISEA/NEA is insistent upon retaining sole collective bargaining authority, they must acknowledge the obligation to be inclusive and communicative to non-members with respect to negotiations and its outcomes.

### ISEA/NEA

This study aimed to explore the factors that influenced ISEA/NEA membership decisions, as well as the degree to which former ISEA/NEA members were aware, involved, and aligned with ISEA/NEA political activities and how the political activities influenced membership choices related to ISEA/NEA. Much constructive feedback from a captive audience of former and would-be ISEA/NEA members emerged that is worthy of consideration on the part of ISEA/NEA leaders. There is much to be gained in terms of understanding the perspectives of those who have chosen to discontinue or bypass ISEA/NEA membership.

Implications of the feedback are significant when considering: (1) ISEA/NEA's self-reported declining membership (National Education Association, 2013b), (2) support for labor unions continues to decline among the American public (Gallup, 2014), (3) younger educators do not see as much relevance in joining a labor union (Farkas et al., 2003; National Education Association, 2013b), and (4) viable, relevant non-union alternatives for professional associations are available (Association of American Educators, 2014; Christian Educators Association International, 2014; Professional Educators of Iowa, 2014a). That said, the union response to these insights should not be appearance-level remarks or changes, but should reflect deep-seated changes aimed at authentically serving a spectrum of educators.

As the saying goes, "perception is reality." Many of the following insights are indeed the reality of former and would-be members based on their experiences and knowledge of ISEA/NEA. The following implications will be explored in greater detail: (1) the need for an educated populous, (2) the identity crisis within ISEA/NEA, (3) the unification rule, (4) membership dues, (5) ISEA/NEA political activities, (6) ISEA/NEA social platform, (7) educators-first mentality, and (8) public schooling today.

An educated populous. Professional organizations should desire that their members are well-informed consumers who have chosen to be members based on the merits of the organization. The NEA should aim for a membership that is well-informed. The lack of awareness among former and would-be members relates to a lack of discernment on the part of educators. Former ISEA/NEA members were supporting an organization that was both representing them and having profound impact on the public

education scene across Iowa and nationally, but they largely did not understand what that representation and impact entailed.

That said, many educators believed that ISEA/NEA was not transparent about the political activities and the allocation of membership dues. Many educators believed the reason for the lack of transparency is the desire to add to membership rosters and coffers, without regard for the needs or desires of the individuals. Within the *2013-2014 Modified NEA Strategic Plan and Budget*, the NEA outlines their strategy for increasing membership due to a gross decline in membership. According to NEA (2013b),

[This strategy includes being] laser-focused on figuring out how to grow membership and plans to do this through research-based campaigns engineered to determine what works. Specific attention is placed on young members, developing and supporting the implementation of alternative dues collection options, and developing models for new and nontraditional membership types. (p. 26)

Consideration for the findings within this study may help NEA leaders both understand the values, beliefs, and priorities of potential and former members, as well as guide their membership recruitment efforts. However, many study participants contended ISEA/NEA merely desires increased members and membership dues without in turn informing and contributing positively to their professional livelihood. They also believed that what ultimately spurred this desire is the drive of the ISEA/NEA leadership to fulfill a political mission that may not align with its array of members, which even NEA leaders have acknowledged.

An opportunity for ISEA/NEA leaders that emerged within the study is to increase transparency so that potential and current members clearly understand how

ISEA/NEA represents them. Another opportunity for ISEA/NEA is to desire a well-informed membership of educators who fully understand what ISEA/NEA representation entails. But it is also of importance that ISEA/NEA give credit to educators that they can and will support things of most importance to them and if the priorities of the ISEA/NEA are important to them, they will choose to support through membership.

Identity crisis. ISEA/NEA appears to be an organization with an identity crisis. On one hand, ISEA/NEA purports to be a professional association, yet it has chosen to be classified as a 501(c)(5), labor organization by the Internal Revenue Service. Even within the *2013-2014 Modified NEA Strategic Plan and Budget*, NEA refers to being both a union and an association. Yet, 96% of those who bypassed ISEA/NEA believed ISEA/NEA was a labor union and not a professional association. In the following section, a distinction in definition between a professional association and a union will be further explored.

Hallmarks of a professional association are to establish, maintain, and enhance professional identity, as well as to establish criteria for membership into the profession, adopt a code of ethics, and engage in political activity related to licensing and continuing education (Ritzer & Walczak, 1986). An example of a professional organization would be PEI, which the Internal Revenue Service classifies as a 510(c)(6), a business league. A business league is characterized as “An association of persons having some common business interest, the purpose of which is to promote that common interest and not to engage in a regular business carried on for profit” (Internal Revenue Service, 2012a).



Following the same line of reasoning, a key tenet of being a professional is that “professionals make deliberate choices, where others [not part of a profession] have choices made for them” (Rutledge, 2011, p. 9). The notion of decision making is an interesting paradigm to address because educators want to be seen as professionals, yet many are part of a teachers’ union that is making decisions on behalf of them over issues directly and indirectly related to the profession of education that they may or may not be aware of or agree with.

Contrast the professional association against that of a labor union, which is defined as an “Association of workers who have combined to protect and promote interests of the members by bargaining collectively with their employers to secure better working conditions” (Internal Revenue Service, 2012a, para 1). Hallmarks of a labor union include a focus on relationships with employers, job security, and terms of employment. As such, while professional association members join most often for information and camaraderie, union members are inclined to join more for job security reasons (Hurd, 2000).

As a reminder, 38% of educators did not join ISEA/NEA at all due to the connotation of being a labor union, while 22% of former members left ISEA/NEA because of that same connotation. The connotation of a labor union leaves many educators who desire a professional association uncomfortable. Yet, in NEA’s quest to attain “national and global leadership and influence,” it aims to “facilitate and support leadership initiatives that strengthen NEA’s alliance with U.S. and international labor unions” (National Education Association, 2013b, p. 56). As evidence of this quest, in

January 2014, a “labor solidarity partnership” was announced between NEA and the American Federation of Labor-Congress of Industrial Organizations (AFL-CIO) “to strengthen and unify the union movement” (American Federation of Labor-Congress of Industrial Organizations, 2014, para 1).

But it is not just the label of labor union, it is also the actions associated with unions that have deterred many educators in Iowa away from ISEA/NEA. From hard-lined negotiations and rigid contractual agreements, to seniority and the grievance process, many educators believe these labor tactics detract from the notion of education as a profession. The pressure to join and maintain membership are also of concern to many former and would-be members. They believe professionals should not be pressured or cajoled into membership with ISEA/NEA.

The following premise holds true for unions and professional associations, regardless of how the organization labels itself. For some educators, ISEA/NEA will be a perfect match for their professional desires and wants for representation. For others, an association like PEI may be a better fit. It may be worthy for ISEA/NEA leaders to consider that if membership is in decline and they have to resort to what many perceive as high pressure tactics to maintain or increase membership, perhaps the union services provided are becoming irrelevant to modern day educators. It may be time for ISEA/NEA to do an internal examination of how ISEA/NEA could be more authentically appealing to educators. It is reasonable to believe if the record, relevance, and reputation of the ISEA/NEA are positive in the minds of educators, the ISEA/NEA memberships will sell themselves.

The association and union designations may be considered polarities. If ISEA/NEA wants to be identified as a professional association, then the labor union designation and labor tactics may need to be reconsidered. Educators in general, as well as ISEA/NEA leaders, must grapple with the question that Peter Shrag (1998) posed. “[Are] teachers just another collection of blue-collar working stiffs or are they professionals whose responsibilities transcend the limitations of negotiated hours, working conditions, and seniority rules?” (as cited in Richards, 2008, p. 173).

Unification rule. As a reminder, the unification rule requires state and national membership as part of local union membership. The tie to the state and national level union deters many people from joining at any level, as they perceive the NEA to have a stranglehold on the state and local unions, something they do not want to be part of. Forty-six percent of those who bypassed ISEA/NEA membership and 47% of former members would be open to joining the local union in their district if the unification rule was revoked.

Many educators believe that the disproportionate amount of membership dues that goes to the state and national levels leaves little left for the locals, which is often times their personal priority. Many would-be members might be more open to considering membership if again they could only join the local or restructure the membership fees so that a higher percentage is designated to the locals and lower percentages are designated for the state and national. If the ISEA and NEA are confident that the services they provide are appealing to educators, members would certainly continue paying for

membership at all three levels. But the question undoubtedly emerges if those members would see the value and join all three levels of the union.

As Moe (2011) contended, the locals are they key to union power and success at the state and national levels. Many educators feel compelled to support the local, but not at the expense of joining the state and national, which they felt are too disengaged from the local needs in education. They did not feel that a one-size-fits-all model for membership necessarily reflected their needs. Local memberships may increase if the unification rule for membership was disbanded and three levels of membership were again options provided to educators.

Another way many nonunion educators reported trying to support the local was through donations to offset the costs of negotiations. While some local unions graciously accepted these generous donations, there were many other stories in which non-members' gifts were rejected outright, returned, or remained unused. This may be an opportunity for ISEA/NEA to open the door to those non-member educators who want to contribute and support the local without full membership.

Membership dues. Another significant theme radiating that emerged in the study related to membership dues. Specifically, two areas of concern emerged: (1) the high cost of membership dues, and (2) how membership dues were allocated politically and toward a non-education focused agenda.

Cost of ISEA/NEA membership was cited as the number one factor for bypassing or discontinuing membership with ISEA/NEA. In fact, 82% of those who bypassed ISEA/NEA membership and 79% of those who discontinued membership cited cost as

the number one factor. Many educators said they simply could not afford the high cost of membership, while others said they simply were not willing to pay exorbitant membership dues. For them, it came down to the costs of ISEA/NEA outweighing the benefits.

Second, political allocation of dues was a chief concern among those who discontinued ISEA/NEA membership and the third factor for those who opted not to join ISEA/NEA. This reflects 73% of those who discontinued ISEA/NEA membership and 70% of those who bypassed ISEA/NEA membership. Study respondents believed that ISEA/NEA tapped into membership dues for such things as political candidate endorsements, political party affiliation, social issues, resolutions, and organizational affiliations.

The findings of this survey suggested that there is confusion on the part of educators about how dues are allocated. The NEA Statement on Campaign 2008 Expenditures (National Education Association, 2008), expressly states, “NEA is prohibited from using dues money for candidate contributions or expenditures,” meaning that only voluntary contributions set aside for political activity may be legally used toward campaigns, candidate endorsements, or other political expenditures. However, former NEA General Counsel Robert Chanin acknowledged that it was difficult to “separate the NEA’s collective bargaining from politics – you just can’t... It’s all politics” (Richards et al., 2004, para. 12).

Chanin’s acknowledgement is bold and likely accurate given the political context of public education today and the stake that NEA has. More so than its likely accuracy,

Chanin's acknowledgement negates the previous statement about prohibition of NEA membership dues for political activities. Regardless, would-be and current members deserve an accurate depiction of how membership dues are indeed allocated for politics.

As reflected in Chapter 2, these political activities are largely partisan and historically have leaned toward the Democratic Party, which left moderate and conservative educators feeling marginalized. According to Moe (2011),

[This allegiance with the Democratic Party] makes good political sense, because both sides have much to gain from it. Democratic candidates receive almost all of the union's substantial political contributions, their in-the-trenches manpower, and their public relations machinery... In return, the unions can usually count on the Democrats to go to bat for them in the policy process: by insisting on bigger budgets, higher salaries, job protections, and other union-favored objectives- and most important, by standing in the way of major reform." (p. 9)

But even by NEA's own admission, their membership represents a vast political spectrum, more diverse than the liberal political agenda typically engaged in by ISEA/NEA. As a reminder of NEA's own findings, 55% of NEA members considered themselves conservatives and 59% identified themselves as not aligned to the Democratic Party (National Education Association, 2006). It appears to validate a disconnect in political representation among the cross section of members by ISEA/NEA leaders. Many observers may believe the win-win relationship with the Democratic Party is of more importance than representing the full spectrum of their members.

It may behoove the ISEA/NEA to simply acknowledge their political party allegiance and political leanings. As one respondent in the study suggested, ISEA/NEA should not pretend to be something they are not. They should not say they engage in bi-

partisan politics when evidence largely suggests just the opposite. ISEA/NEA should proudly say, “We support the Democratic Party or Democratic candidates” and provide their reasons why.

Lastly, tied to the concern of how dues were allocated related to use of membership dues toward a wide-ranging political and social agenda that was perceived to have little, if any tie, to education. NEA refers to its political and social agenda as its “progressive public policy agenda” (National Education Association, 2012a, p. 7). Many educators, even within the current NEA ranks, believe that NEA has overstepped their reach with the 365 resolutions and other actions taken. Interestingly, many would-be members indicated they would consider joining ISEA/NEA if the political and social activities directly and only impacted education.

Many of the NEA philosophical opinions, intentions, beliefs, and positions appear to be on the periphery to what is needed in today’s public education classroom and what is actually desired by many educators. No doubt, many of the issues identified in the resolutions are important and should be addressed. It is hard to argue that capital punishment, nuclear facilities, tax reform, extremist groups, social security, torture, trade sanctions, and genocide are not important issues with which our society needs to contend (National Education Association, 2013a). But for many study participants, it is difficult to surmise how an organization committed to public education can possess such a far-reaching set of platform issues that appears to be disconnected from the classroom.

The other concern that emerges related to the vast platform is that the positions related to each issue are not representative of all ISEA/NEA members. How could any position possibly represent all 2.4 million members? For study participants, it reflected another opportunity for the NEA to disenfranchise those divergent thinkers and those who do not “get it.” By and large, those that discontinued ISEA/NEA membership began to question the positions the ISEA/NEA took, as well as how their dues were being spent and how they were being represented politically and socially.

Educators-first. Former and would-be members of the ISEA/NEA find it disconcerting that so much of what ISEA/NEA focuses on is related to teacher rights, and perceive that it is often at the expense of students. Noteworthy is that 1% of study participants believed that ISEA/NEA was focused on benefiting students, which makes complete sense when one considers that labor unions are largely concerned with advancing employee protections and workplace rights.

Yet, ISEA/NEA leaders and members claim to be a professional association with the ideal of advancing education in a positive manner. As quite possibly the largest single influence in public education, it is worrisome that NEA can be seen as dismissive of the needs of students, given that the profession is predicated on the notion of quality public education for students. After all, the NEA vision is “a great public school for every student” (National Education Association, 2012b).

However, by NEA’s own admission throughout the years, the leaders of the NEA organization are indeed vocal about their quest for power at the expense of students. As former NEA President Mary Hatwood-Futrell boldly stated, “The major purpose of our



association is not the education of children. It is or ought to be the extension and/or preservation of our members' rights" (Providence Business News, 2010, para. 7).

Former NEA President Bob Chase also reiterated Hatwood-Futrell's sentiments by saying, "[NEA has] used its power to block uncomfortable changes, to protect then narrow interests of its members, and not to advance the interests of students and schools" (Moe, 2011, p. 247). Even Bob Chanin, former NEA General Counsel, said of the quest for power... "It is not because we care about children, and it is not because we have a vision of a great public school for every child. NEA and its affiliates are effective advocates because we have power." Chanin went on to say with regard to closing the achievement gaps, reducing drop-out rates and improving teacher quality, that "These are the goals that guide the work we do. But they need not and must not be achieved at the expense of due process, employee rights, or collective bargaining" (National Education Association, 2011c).

What is often lost behind this argument that the NEA makes for educator's rights is that educators would not be educators without students. It is undeniable that the teachers' unions have made huge gains for educators for which all educators should be thankful. But it may be time to consider retiring the antiquated way of doing business in favor of being a progressive force in public education. After all, public education is not a jobs program. The teachers' unions would not exist without students in public education, which leads to further exploration about public schooling today and just how the teachers' union could and should be a positive force in public education.

Public schooling today. Formerly, NEA membership was thought to be a sign of professional leadership and by being a member, one was contributing favorably to public schooling (Ota, 1985; Waters, 2010). Today, many outsiders question if membership to a teachers' union is indeed a sign of professionalism or a matter of preserving occupational interests.

Study participants were less inclined to see ISEA/NEA as a positive force in education. While 51% reported that ISEA/NEA fostered the status quo, 48% believed ISEA/NEA was in the middle of a continuum between fostering the status quo and advancing education in a positive way for public education students. Notably, only 1% of all study respondents believed ISEA/NEA was advancing education in a meaningful way for students. Yet public education advocates in today's educational climate are clamoring to describe the teachers' unions as "forward- thinking," "reform-minded," "advancements," or "student-first."

After all, students are or should be the purpose of public education. As stated earlier, NEA's vision statement is "A great public school for every student" (National Education Association, 2012b). However, it is reasonable to question if the means that NEA employs actually lead to the ends of "A great public school for every student," especially in light of NEA leaders' self-reported focus on power and job-related interests.

Undoubtedly, education has benefitted from the early toil of the teachers' unions. For that, all educators should be thankful. From minimizing the abuses of early educators to enhancing the compensation and benefits, the teachers' union has made an impactful

mark in improving conditions for public school educators across the United States. Can the same be said for students? Many also wonder whether the teachers' unions are keeping pace with the needs in public education. Many see teachers' unions as a mechanism which is decelerating desperately needed reform in our public school system.

As Moe suggested, "It is fair to say that many who are directly involved in school reform – elected and appointed policymakers, think tank experts, leaders of foundations, advocates for the disadvantaged, opinion leaders, and commentators from major news outlets – recognize that the teachers unions are standing in the way of effective schools" (2011, p. 241). The teachers' unions should advocate for public education alongside these groups. Yet, as Moe stated, "[The teachers' unions] have fundamental interests that drive them to oppose almost all consequential changes in the educational status quo" (p. 183).

Moe then put forward the idea of reform unionism in which unions remain a powerful player in public education, but "can be persuaded to do *good* things with their power" (2011, p. 242). As Moe asserted, it is necessary to find a mechanism that appeals to the teachers' unions to become part of the solution in education versus a contributing factor to the growing problems in public education.

With the myopic focus on protections and advancements for the members of the teachers' union, it is difficult to see how teachers' unions benefit students. Yet, if reform is to take place in public education and students are going to become the number one beneficiary of public education, Moe (2011) suggested two major shifts need to occur within education.

First, the recognition of educators as professionals is key, which was clearly validated by study participants. No longer can educators view themselves as factory workers with a myopic focus on protections and still retain the fleeting trust of the American public. No longer can they solely focus on the occupational interests that benefit educators, which in and of itself appears to be a roadblock to reform.

Second, teachers' union leaders must recognize that it is in the interest of the teachers' unions to improve the public schools and put student first. As Moe (2011) contended, if public education does not improve, drastic actions may be taken by reformers that not only weakens the public education system, but also lessens the power and influence the teachers' union presently possesses today.

It is ironic and troubling that a teachers' union that has adopted a vast "progressive public policy" agenda (National Education Association, 2012a, p. 7), yet cannot apply that same level of progressiveness in public education. If teachers' unions are reluctant to embrace these ideas of reform, they run the risk of becoming obsolete. In the context of declining support for labor unions in general and self-reported declining teacher union membership, they may already be on their way.

Many public school advocates have watched the teachers' unions over the years and question the likelihood of the union's ability to place students first or recognize that advancing education actually serves their best interests. Yet, Iowa educators in this study provide hope to public education as they indicate the desire to do just that.

### Further Study

The areas of further study are many, as the teachers' unions are an influential conglomerate of power and intrigue. Despite that prominence in today's public education scene, the teachers' unions are not well-studied. All of the following recommendations for further study bear great relevance because of the political powerhouse the NEA has become and the influence it is having in our public schools and on our students.

### ISEA/NEA Perspectives

Conducting research similar to this study with current ISEA/NEA members, including staffers at both the ISEA/NEA levels, would provide great insights into educators in Iowa who are part of the union. It would benefit education researchers to know what members of ISEA/NEA really think of how they are represented by ISEA/NEA, and the political activities. It would be of interest to evaluate if their beliefs are aligned with that of former ISEA/NEA members.

Similarly, it would be interesting to understand if ISEA educators are more politically conservative than other state affiliates or the NEA membership at large. Additionally, an updated study of membership trends related to NEA and state affiliates would be of great interest in which distinct clarity is provided about actual membership numbers and who actually comprises the membership. All of these ideas considered, getting at the heart of why teachers unions are on the decline from the perspective of current members might provide great insight.

### Impact on Public Education

There was little confidence by study participants that ISEA/NEA engaged in activities that benefitted students and advanced the cause of public education in a positive direction. An impact study with updated analysis specific to these two issues would shed light on the question as to whether or not ISEA/NEA is embracing opportunities to move public education forward in a meaningful way for students. Specifically, studying the tie between teachers' unions, innovation, and student achievement is crucial.

### Professional Educators of Iowa

Also, of interest to alternative associations such as PEI, would be a study on the prominence, popularity, and impact of these associations on public education in other states. It would also be beneficial to do case studies on districts which dissolved their teachers' union in favor of alternative organizations like PEI. Lastly, it would be a valuable contribution to scholarly knowledge to know if and how ISEA and PEI educators have coexisted in districts, as well as how effective dual bargaining processes have been implemented.

### Demographics

Because this study largely involved participants who identified themselves as white, it would be interesting to understand and compare the perspectives of ethnic and racial minority educators with regard to union representation. Along the same lines, this study largely captured the thoughts of rural educators. It would provide valuable insight to understand and compare the perspectives about the teachers' union of more suburban and urban educators, as well as the rates with which membership declines in those areas.

Lastly, it would be interesting to dig deeper into the generational differences that may exist related to the union and politics between young and veteran educators.

#### Right-to-Work and Fair Share

The need exists to further delve into the impact of Fair Share and Right-to-Work states, as it relates to public education. It would be helpful to know the culture of public education in those states, as well as the level of morale among educators in both states. But more importantly, it would be beneficial to understand the impact Fair share and Right-to-Work has had on student achievement and outcomes.

#### Higher Education

Lastly, very little is known about the relationship of the NEA state affiliates and the universities preparing pre-service teachers. It may provide valuable insight into how young educators first learn about and are influenced to join ISEA/NEA, as well as what other professional associations are introduced to them as undergraduates.

#### Conclusions

Through The Model of Decision Making put forward in this study, much can be learned about the factors influencing our Iowa educator's membership choices related to the teachers' union, as well as what is fundamentally important to them in terms of professional representation. It is hoped that all parties outlined in the previous section of Chapter 5 will reflect on the findings and implications that emerged from this study of Iowa educators who are passionate about public education and students.

Specifically, there are many opportunities for ISEA/NEA leaders to be responsive to the considerations of Iowa educators who are former or would-be members. These educators pinpointed the factors that influenced their membership choices with regard to ISEA/NEA politics and membership in general.

Study participants desired a professional organization, looking after public education's most prized possession- students. They were largely not interested in an organization with a vast agenda that took focus and resources away from the classroom. As the findings validated, many educators believed it is time for the ISEA/NEA to get back to the roots of public education, which are our nation's students. A concerted effort is needed by NEA and the state affiliates to not only state the vision of "A great public school for every student," but to ensure that teachers' union actions and the actions of their state affiliates like ISEA match these words.

Successful advocacy for the profession of education is predicated on the notion that that the teachers' union can move past a labor-oriented view of educators, the collective occupational interests of the teachers' unions, and the seemingly far-reaching progressive agenda that appears to be more of a distraction to advancing public education than the propellant needed today.

It comes down to a matter of organizational integrity and execution. But part of the integrity and execution relates to representing a wide-ranging spectrum of educators. Many study participants felt unrepresented by ISEA/NEA, whether they were former or prospective members. It is hoped that ISEA/NEA leaders see the wisdom in authentically



representing their vast and diverse membership and not just the faction of those who blindly align.

The union response to the study implications shared will be tell-tale. To make a lasting mark in education, the union leaders must give pause to the insights shared by Iowa educators. The response by union leaders to the findings, should not be appearance-level arguments entrenched in the way things have always been done, with seemingly self-serving protections guiding the way. It is time that the teachers' unions hear what educators are saying and be part of the solution, versus an ongoing and contributing factor to the growing problems in public education.

The union leaders' willingness to apply their progressive agenda and fighting spirit to public education, as well as apply deep-seated changes are both keys for a brighter future in public education and for our students. We can and should expect more of the NEA and the state affiliates like ISEA.

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APPENDIX A  
FOCUS GROUP DEMOGRAPHIC TABLES

Table A1

*Focus Group Respondent Demographics*

Focus Group Demographics	No Previous ISEA (N = 7)	Percent	Previous ISEA (N = 4)	Percent	Total Participants (N = 11)	Percent
<b>Age</b>						
20-30	3	42.9	1	25.0	4	36.4
31-40	4	57.1	2	50.0	6	54.5
41-50	0	0.0	0	0.0	0	0.0
51-60	0	0.0	1	25.0	1	9.1
60+	0	0.0	0	0.0	0	0.0
<b>Gender</b>						
Male	3	42.9	1	25.0	4	36.4
Female	4	57.1	3	75.0	7	63.6
<b>Race</b>						
White	7	100.0	4	100.0	11	100.0
<b>Position</b>						
Teacher	7	100.0	4	100.0	11	100.0
<b>Attained Education</b>						
Bachelors	4	57.1	2	50.0	6	54.5
Masters	3	42.9	2	50.0	5	45.5

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

Table A2

*Focus Group Respondent Length in Education and ISEA*

Focus Group Demographics	No Previous ISEA (N = 7)		Previous ISEA (N = 4)		Total Participants (N = 11)	
		Percent		Percent		Percent
<b>Length as Educator</b>						
1-5 Years	1	14.3	0	0.0	1	9.1
6-10 Years	4	57.1	2	50.0	6	54.5
11-15 Years	2	28.6	0	0.0	2	18.2
16-20 Years	0	0	1	25.0	1	9.1
21-25 Years	0	0	0	0.0	0	0.0
26-30 Years	0	0	1	25.0	1	9.1
<b>Length ISEA Member</b>						
1-5 Years	X	X	4	100.0	4	100.0
6-10 Years	X	X	0	0.0	0	0.0
11-15 Years	X	X	0	0.0	0	0.0
16-20 Years	X	X	0	0.0	0	0.0
21-25 Years	X	X	0	0.0	0	0.0
26-30 Years	X	X	0	0.0	0	0.0

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

Table A3

*Focus Group Respondent Political Data*

Focus Group Demographics	No Previous ISEA (N = 7)		Previous ISEA (N = 4)		Total Participants (N = 11)	
		Percent		Percent		Percent
<b>Political Orientation</b>						
Liberal	1	14.3	0	0.0	1	9.1
Moderate	0	0.0	3	75.0	3	27.3
Conservative	6	85.7	1	25.0	7	63.6
<b>Political Party Vote</b>						
Democrat	1	14.3	0	0.0	1	9.1
Independent	0	0.0	2	50.0	2	18.2
Republican	6	85.7	1	25.0	7	63.6
Other	0	0.0	1	25.0	1	9.1
<b>Political Involvement</b>						
Actively Involved	0	0.0	0	0.0	0	0.0
Moderately Involved	4	57.1	1	25.0	5	45.5
Uninvolved	3	42.9	3	75.0	6	54.5

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

Table A4

*Focus Group Respondent Political Orientation and Party Affiliation*

Political Party Affiliation of Focus Group Respondents	Totals		Democrat (N = 1)		Independent (N = 3)		Republican (N = 7)		Other (N = 11)	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Liberal Percent	(N = 1)	100.0	1 100.0	100.0	0 0	0 0	0 0.0	0 0.0	0 0	0 0.0
Moderate Percent	(N = 3)	100.0	0 0.0	0.0	2 100.0	67.0	0 0.0	0 0.0	1 1	33.0
Conservative Percent	(N = 7)	100.0	0 0.0	0.0	0 0.0	0.0	7 100.0	100.0	0 0	0.0
Totals Percent	11	100.0	100.0		100.0		100.0		100.0	

*Note.* Percent in rows indicates the analysis of political orientation broken down by political party affiliation (e.g., 67% of moderates voted Independent), while the percent in columns reflects political party affiliation broken down by political orientation (e.g., 100% of Republicans consider themselves to be conservative).

Table A5

*Focus Group Respondent Building and District Data*

Focus Group Demographics	No Previous ISEA (N = 7)	Percent	Previous ISEA (N = 4)	Percent	Total Participants (N = 11)	Percent
Building Level						
PreK-Elementary	3	42.9	2	50.0	5	45.4
Middle School	3	42.9	1	25.0	4	36.4
High School	1	14.2	1	25.0	2	18.2
District Size						
Rural	1	14.3	1	25.0	2	18.2
Suburban	1	14.3	1	25.0	2	18.2
Urban	5	71.4	2	50.0	7	63.6
Declined Response						
District Type						
Public	7	100.0	4	100.0	11	100.0
Private	0	0.0	0	0.0	0	0.0
Parochial	0	0.0	0	0.0	0	0.0

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

Table A6

*Focus Group Respondent Building Level by District*

Building Level	Size of District (N = 2)	Rural (N = 2)	Suburban (N = 2)	Urban (N = 7)
PreK-Elementary		0	2	3
Middle School		0	0	4
High School		2	0	0

APPENDIX B  
SURVEY DEMOGRAPHIC TABLES

Table B1

*Survey Respondent Length in Education and PEI*

Demographics Survey Respondents	No Previous ISEA (N = 240)		Previous ISEA (N = 423)		Total Participants (N = 663)	
		Percent		Percent		Percent
Length as Educator						
< 1 Year	12	5.6	0	0.0	12	2.0
1-5 Years	49	22.7	14	3.6	63	10.3
6-10 Years	49	22.7	70	17.8	119	19.5
11-15 Years	37	17.1	53	13.4	90	14.8
16-20 Years	27	12.4	66	16.8	93	15.3
21-25 Years	19	8.8	71	18.1	90	14.8
26-30 Years	11	5.1	66	16.8	77	12.7
30+ Years	12	5.6	53	13.5	65	10.7
Declined Response	24	X	30	X	54	X
Length PEI Member						
< 1 Year	39	16.3	55	13.0	94	14.2
1-5 Years	85	35.6	136	32.3	221	33.4
6-10 Years	58	24.3	105	24.9	163	24.7
11-15 Years	33	13.8	57	13.5	90	13.6
16-20 Years	12	5	41	9.7	53	8.0
21-25 Years	4	1.7	17	4.0	21	3.2
26-30 Years	7	2.9	7	1.7	14	2.1
30+ Years	1	0.4	4	0.9	5	0.8
Declined Response	1	X	1	X	2	X

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.  
*Note:* The numbers in the percent columns are not inclusive of those that declined response to a given question.

Table B2

*Survey Respondent Length and Involvement in ISEA*

Demographics Survey Repondents	Previous ISEA	
	(N = 423)	Percent
Length ISEA Member		
< 1 Year	11	2.6
1-5 Years	216	51.6
6-10 Years	93	22.2
11-15 Years	57	13.6
16-20 Years	28	6.7
21-25 Years	6	1.4
26-30 Years	7	1.7
30+ Years	1	0.2
Declined Response	4	X
Level ISEA Participation		
Uninvolved	256	61.1
Average Member	128	30.6
Activist	6	1.4
Leadership	29	6.9
Declined Response	4	X

*Note:* The numbers in the percent columns are not inclusive of those that declined response to a given question.



Table B3

*Survey Respondent Personal Demographic Data*

Demographics Survey Respondents		No Previous ISEA		Previous ISEA		Total Participants	
		(N = 240)	Percent	(N = 423)	Percent	(N = 663)	Percent
Gender							
	Male	63	29.2	107	27.2	170	27.9
	Female	153	70.8	287	72.8	440	72.1
	Declined Response	24	X	29	X	53	X
Hispanic							
	No	213	98.6	391	99.7	604	99.4
	Mexican, Mexican Amer	2	0.9	0	0.0	2	0.3
	Puerto Rican	1	0.5	0	0.0	1	0.2
	Other	0	0.0	1	0.3	1	0.2
	Declined Response	24	X	31	X	55	X
Race							
	White	211	98.6	388	99.1	599	99.0
	American Indian or Alask	1	0.5	1	0.3	2	0.3
	Asian or Asian American	2	0.9	1	0.3	3	0.5
	Pacific Islander	0	0.0	1	0.3	1	0.2
	Declined Response	26	X	32	X	58	X
Position							
	Teacher	190	99.5	373	98.9	563	99.1
	Administrator	1	0.5	4	1.1	5	0.9
	Declined Response	49	X	46	X	95	X
Attained Education							
	Associate	2	1.0	2	0.5	4	0.6
	Bachelors	108	50.7	161	41.0	269	44.4
	Masters	99	46.5	221	56.2	320	52.8
	Specialist	2	0.9	7	1.8	9	1.5
	Doctorate	2	0.9	2	0.5	4	0.7
	Declined Response	27	X	30	X	57	X

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

*Note:* The numbers in the percent columns are not inclusive of those that declined response to a given question.

Table B4

*Survey Respondents Political Data*

Demographics Survey Respondents	No Previous ISEA (N = 240)		Previous ISEA (N = 423)		Total Participants (N = 663)	
	Percent	Percent	Percent	Percent	Percent	Percent
<b>Political Orientation</b>						
Liberal	13	6.2	24	6.2	37	6.2
Moderate	46	21.8	91	23.6	137	23.0
Conservative	134	63.5	223	58.0	357	59.9
None	18	8.5	47	12.2	65	10.9
Declined Response	29	X	38	X	67	X
<b>Political Party Vote</b>						
Democrat	30	14.4	73	19.2	103	17.5
Independent	20	9.6	57	15.0	77	13.1
Republican	141	67.5	245	64.5	386	65.5
Other	18	8.6	5	1.3	23	3.9
Declined Response	31	X	43	X	74	X
<b>Political Involvement</b>						
Actively Involved	7	3.3	11	2.8	18	3.0
Moderately Involved	58	27.2	118	30.3	176	29.2
Uninvolved	95	44.6	171	43.8	266	44.1
Depends on the Year	53	24.9	90	23.1	143	23.7
Declined Response	27	X	33	X	60	X

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

*Note:* The numbers in the percent columns are not inclusive of those that declined response to a given question.

Table B5

*Survey Respondent Political Orientation by Previous ISEA Experience*

Political Orientation of Survey Respondents		Liberal		Moderate		Conservative		None	
		(N = 37)	Percent	(N = 137)	Percent	(N = 357)	Percent	(N = 65)	Percent
Previous ISEA Experience									
No Previous ISEA	(N = 221)	13	6.0	46	22.0	134	64.0	18	8.0
	Percent	35.0		34.0		38.0		28.0	
Previous ISEA	(N = 385)	24	6.0	91	24.0	223	58.0	47	12.0
	Percent	65.0		66.0		62.0		72.0	
Totals	(N = 606)	37	6.0	137	23.0	357	59.0	65	11.0
	Total Percent	100.0		100.0		100.0		100.0	

*Note.* Percent in rows indicates the analysis of previous ISEA/NEA experience broken down by political orientation (e.g., 64% of those with no previous ISEA/NEA experience are conservatives). The percent in columns reflects political orientation broken down by previous ISEA/NEA experience (e.g., 35% of liberals did not previously belong to ISEA/NEA).

Table B6

*Survey Respondent Political Orientation and Party Affiliation*

Political Party of Survey Respondents		Democrats		Independent		Republican		Other	
		(N=102)	Percent	(N = 77)	Percent	(N = 389)	Percent	(N = 22)	Percent
Political Orientation of Survey Respondents	Totals								
Liberal	(N = 35)	32	91.0	1	3.0	1	3.0	1	3.0
	Percent	31.0		1.3		0.3		4.5	
Moderate	(N = 132)	45	34.1	30	22.7	56	42.4	1	0.8
	Percent	44.0		38.9		14.4		4.5	
Conservative	(N = 361)	4	1.1	22	6.1	321	89.0	14	3.8
	Percent	4.0		28.6		82.5		63.7	
None	(N = 62)	21	34.0	24	38.7	11	17.7	6	9.6
	Percent	21.0		31.2		2.8		27.3	
Totals Percent	(N=590)	100.0		100.0		100.0		100.0	

*Note.* Percent in rows indicates the analysis of political orientation broken down by political party affiliation (e.g., 91% of liberals voted Democrat), while the percent in columns reflects political party affiliation broken down by political ideology (e.g., 31% of Democrats consider themselves to be liberal).

Table B7

*Survey Respondents Building and District Data*

Demographics Survey Respondents		No Previous ISEA (N = 240)		Previous ISEA (N = 423)		Total Participants (N = 663)	
		Percent	Percent	Percent	Percent	Percent	Percent
<b>Building Level</b>							
	PreK-Elementary	83	39.5	160	41.2	243	40.6
	Middle School	44	21.0	104	26.8	148	24.8
	High School	83	39.5	124	32.0	207	34.6
	Declined Response	30	X	35	X	65	X
<b>District Size</b>							
	Rural	120	56.1	239	60.9	359	59.2
	Suburban	51	23.8	103	26.3	154	25.4
	Urban	43	20.1	50	12.8	93	15.4
	Declined Response	26	X	31	X	57	X
<b>District Type</b>							
	Public	212	98.6	389	99.2	601	99.0
	Private	1	0.5	3	0.8	4	0.7
	Parochial	2	0.9	0	0.0	2	0.3
	Declined Response	25	X	31	X	56	X

*Note:* The percent in each column reflects three individual groups: (1) Those that had no previous ISEA/NEA membership, (2) those that were previously ISEA/NEA members, and (3) total participants in the focus group, reflecting the total of both those who were not and were ISEA/NEA members previously.

*Note:* The numbers in the percent columns are not inclusive of those that declined response to a given question.

## APPENDIX C

### RECRUITMENT SCRIPTS

#### Focus Group Recruitment Script

Hello, my name is Melissa Reade and as part of my Dissertation work at the University of Northern Iowa, I am conducting research about the perspectives of teachers who belong to PEI about ISEA and NEA. PEI leadership has agreed to support this research and has given me your name as someone who may be interested in participating in this research. So I am asking for your help.

The purpose of this research is to better understand the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aims to understand the factors that may have influenced their membership decisions. Lastly, this study will further explore the degree to which former ISEA members were aware, involved, and aligned with NEA political activities.

There are five overarching questions guiding this research:

1. What are the internal or external factors that led to the decisions of PEI members to previously join ISEA/NEA, and then later discontinue ISEA/NEA membership?
2. What are the internal or external factors that played into the decisions of PEI members to bypass ISEA/NEA membership and join PEI as an alternative?
3. To what degree were former ISEA/NEA members *aware* of the NEA platform resolutions, political candidate endorsements, and organizational affiliations?
4. To what degree did former ISEA/NEA members believe they had *input or influence* into the adoption of the NEA platform resolutions, political candidate endorsements, and organizational affiliations?
5. To what degree did former ISEA members *align* with the NEA platform resolutions, political candidate endorsements, and organizational affiliations?

Although I will not be asking those questions directly, I have a series of questions that relate to the five research questions that I'd like to ask you during a focus group with seven other PEI members. It is anticipated that the focus group will take about 90 minutes.

With your permission, your answers will be audio recorded, then transcribed; once the study is concluded both the recordings and the transcripts will be destroyed. All data gathered will be de-identified, allowing for complete anonymity of you, your community, and your school district. At no time will you or any identifying information appear in the dissertation or in any other publication of the research.

If at any time you feel uncomfortable with the questioning during the focus group, you may excuse yourself.

This research has the potential to impact individual teachers making choices about professional organizations and union membership.

Thank you for your consideration. Will you be willing to participate in the focus group?

### Pilot Survey Recruitment Script

Hello, my name is Melissa Reade and as part of my Dissertation work at the University of Northern Iowa, I am conducting research about the perspectives of teachers who belong to PEI about ISEA and NEA. PEI leadership has agreed to support this research and has given me your name as someone who may be interested in participating in this research. So I am asking for your help.

The purpose of this research is to better understand the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aims to understand the factors that may have influenced their membership decisions. Lastly, this study will further explore the degree to which former ISEA members were aware, involved, and aligned with NEA political activities.

The pilot survey will take about 20 minutes to complete.

All data gathered will be de-identified, allowing for complete anonymity of you, your community, and your school district. If at any time you feel uncomfortable with the questioning during the survey, you may terminate your involvement in the pilot survey.

This research has the potential to impact individual teachers making choices about professional organizations and union membership.

Thank you for your consideration. Will you be willing to participate in the pilot survey?

### Survey Recruitment Script

Hello, my name is Melissa Reade and as part of my Dissertation work at the University of Northern Iowa, I am conducting research about the perspectives of teachers who belong to PEI about ISEA and NEA. PEI leadership has agreed to support this research. So, I am asking for your help.

The purpose of this research is to better understand the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aims to understand the factors that may have influenced their membership decisions. Lastly, this study will further explore the degree to which former ISEA members were aware, involved, and aligned with NEA political activities.

The survey will take about 20 minutes to complete.

If at any time you feel uncomfortable with the questioning during the survey, you may terminate your involvement in the survey.

This research has the potential to impact individual teachers making choices about professional organizations and union membership.

Thank you for your consideration. If you are interested in participating, please [click here](#).



## APPENDIX D

## CONSENT FORMS

University of Northern Iowa  
Human Participants Review  
Focus Group Informed Consent

**Project Title:** PEI Member Perspectives about ISEA and NEA Political Activities

**Name of Investigator(s):** Melissa Reade

**Invitation to Participate:** You are invited to participate in a research project conducted through the University of Northern Iowa. The University requires that you give your signed agreement to participate in this project. The following information is provided to help you make an informed decision about whether or not to participate.

**Nature and Purpose:** The purpose of this mixed-methods study is to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aims to understand the factors related to the NEA political activities that may have influenced their membership decisions. Lastly, this study will further explore the degree to which former ISEA members were aware, involved, and aligned with NEA political activities.

**Explanation of Procedures:** As part of this study, you have been asked to participate in a focus group, that will take approximately 90 minutes. The following procedures will take place:

1. Upon your arrival to the focus group location, you will be asked to read and sign this consent form and the Participant Demographic Form. The Demographic Form will include brief questions about you (e.g., gender, age, race, etc...)
2. A research assistant will be available to assist with the initial paperwork, ensure the audio equipment is working, and to take notes throughout the focus group session.
3. Upon completion of the necessary paperwork, you will be invited to sit at a table with roughly 10 other participants.
4. The moderator will introduce the agenda for the evening and the purpose of the focus group.
5. The moderator will introduce specific issues related to the focus of the study by reading a brief narrative aloud and also showing the narrative in written format projected on a screen.
6. The moderator will then ask questions of the participants. Participants are encouraged to respond orally to the questions.
7. The focus group session will be audio-recorded. You may opt to sit in an area out of the view of the camera. The purpose of audio-recording is to accurately capture interactions and thoughts of participants. The audio-recording will later be transcribed verbatim.

8. At the end of the study, all data will be compiled and analyzed to draw conclusions about the perspectives of PEI members.

**Discomfort and Risks:** There are no foreseeable risks to participation in the focus group.

**Confidentiality:** Information obtained during this study, which could identify you will be kept confidential. All data gathered will be de-identified, allowing for complete anonymity of you, your community, and your school district. The summarized findings with no identifying information may be published in an academic journal or presented at a scholarly conference. Additionally, the researcher encourages all respondents to be respectful of the confidential nature of responses by others. That said, there is no guarantee that the responses you share will remain confidential by the other members of the focus group.

**Right to refuse or Withdraw:** Your participation is completely voluntary. You are free to withdraw from participation at any time or to choose not to participate at all, and by doing so, you will not be penalized or lose benefits to which you are otherwise entitled.

**Questions:** If you have questions about the study or desire information in the future regarding your participation in the study generally, you can contact Melissa Reade at 319-273-3820. You can also contact the office of the IRB Administrator, University of Northern Iowa, at 319-273-6148, for answers to questions about rights of research participants and the review process.

**Agreement:**

**I am fully aware of the nature and extent of my participation in this project as stated above and the possible risks arising from it. I hereby agree to participate in this project. I acknowledge that I have received a copy of this consent statement. I am 18 years of age or older.**

\_\_\_\_\_  
(Signature of participant)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Printed name of participant)

\_\_\_\_\_  
(Signature of investigator)

\_\_\_\_\_  
(Date)

University of Northern Iowa  
Human Participants Review  
Survey Informed Consent (Electronic)

**Project Title: PEI Member Perspectives about NEA Political Activities**

**Name of Investigator(s):** Melissa Reade

**Invitation to Participate:** You are invited to participate in a research project conducted through the University of Northern Iowa. The University requires that you give your signed agreement to participate in this project. The following information is provided to help you make an informed decision about whether or not to participate.

**Nature and Purpose:** The purpose of this mixed-methods study is to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aims to understand the factors related to the NEA political activities that may have influenced their membership decisions. Lastly, this study will further explore the degree to which former ISEA members were aware, involved, and aligned with NEA political activities.

**Explanation of Procedures:** As part of this study, you have been asked to participate in a survey. The following procedures will take place:

1. The online survey will consist of a series of questions in which you will be given multiple choice answers. You will simply click on the answer that most reflects your thinking about the issue in each question.
2. The online survey will take approximately 5-10 minutes to complete.

**Benefits and Compensation:** Participants will not be compensated for their time by completing this survey. However, those who participate in the survey will have the opportunity to be entered in a randomized drawing for a \$100 Visa Check Card. Two names will be drawn at random and each will receive a \$100 Visa Check Card. To qualify for the drawing, participants must provide their name and email at the end of the survey, as winners will be notified via email in the event their name is drawn. Your name and email will be stored in a separate data base, so that the survey information you provide remains anonymous.

**Discomfort and Risks:** There are no foreseeable risks to participation in the online survey.

**Confidentiality:** Information obtained during this study, which could identify you will be kept confidential. All data gathered will be de-identified, allowing for complete anonymity of you, your community, and your school district. The summarized findings with no identifying information may be published in an academic journal or presented at a scholarly conference. The survey will be accessed online. As such, your confidentiality will be maintained to the degree permitted by the technology used. Specifically, no guarantees can be made regarding the interception of data sent via the Internet by any third parties.

**Right to Refuse or Withdraw:** Your participation is completely voluntary. You are free to withdraw from participation at any time or to choose not to participate at all, and by doing so, you will not be penalized or lose benefits to which you are otherwise entitled.

**Questions:** If you have questions about the study or desire information in the future regarding your participation in the study generally, you can contact Melissa Reade at 563-880-4190. You can also contact the office of the IRB Administrator, University of Northern Iowa, at 319-273-6148, for answers to questions about rights of research participants and the review process.

**Agreement:** I am fully aware of the nature and extent of my participation in this project as stated above and the possible risks arising from it. I hereby agree to participate in this project. I acknowledge that I have received a copy of this consent statement. I am 18 years of age or older.

**Do you agree with the information in this consent form?**

- Yes, I agree to the information in the consent form.
- No, I do not agree to the information in this consent form.

## APPENDIX E

PARTICIPANT DEMOGRAPHIC SHEET  
PEI MEMBER FOCUS GROUP

<b>Years teaching:</b> <input type="radio"/> 1-5 years <input type="radio"/> 6-10 years <input type="radio"/> 11-15 years <input type="radio"/> 16-20 years <input type="radio"/> 21-25 years <input type="radio"/> 26-30 years	<b>Your Age:</b> <input type="radio"/> 20-30 <input type="radio"/> 31-40 <input type="radio"/> 41-50 <input type="radio"/> 51-60 <input type="radio"/> Over 60	<b>Highest level of education:</b> <input type="radio"/> Bachelors <input type="radio"/> Bachelors, but pursuing Masters <input type="radio"/> Masters <input type="radio"/> Masters, but pursuing Specialist or Doctorate <input type="radio"/> Specialist <input type="radio"/> Specialist, but pursuing Doctorate <input type="radio"/> Doctorate
<b>Building level in which you teach:</b> <input type="radio"/> Elementary <input type="radio"/> Middle School/Jr. High <input type="radio"/> Senior High	<b>Size of district in which you teach:</b> <input type="radio"/> Rural <input type="radio"/> Suburban <input type="radio"/> Urban	<b>Your gender:</b> <input type="radio"/> Male <input type="radio"/> Female
<b>Are you of Hispanic, Latino, or Spanish origin?</b> <input type="radio"/> No <input type="radio"/> Yes, Mexican, Mexican American, Chicano <input type="radio"/> Yes, Puerto Rican <input type="radio"/> Yes, Cuban <input type="radio"/> Yes, another Hispanic, Latino, or Spanish origin _____	<b>Your race:</b> <input type="radio"/> White <input type="radio"/> Black, African American <input type="radio"/> American Indian or Alaska Native <input type="radio"/> Asian or Asian American <input type="radio"/> Pacific Islander <input type="radio"/> Other Race _____	<b>How many years were you a member of ISEA/NEA?</b> <input type="radio"/> I opted not to join <input type="radio"/> 1-5 years <input type="radio"/> 6-10 years <input type="radio"/> 11-15 years <input type="radio"/> 16-20 years <input type="radio"/> 21-25 years <input type="radio"/> 26-30 years
<b>What best describes your political orientation?</b> <input type="radio"/> Liberal <input type="radio"/> Moderate <input type="radio"/> Conservative <input type="radio"/> Non-affiliated	<b>In a typical election year, do you usually vote:</b> <input type="radio"/> Democrat <input type="radio"/> Independent <input type="radio"/> Republican <input type="radio"/> Other <input type="radio"/> Green <input type="radio"/> Libertarian <input type="radio"/> Constitution <input type="radio"/> I don't vote	<b>To what degree are you actively involved with your political affiliation?</b> <input type="radio"/> Actively involved <input type="radio"/> Moderately involved <input type="radio"/> Uninvolved <input type="radio"/> Not applicable

## APPENDIX F

## FOCUS GROUP PROTOCOL

**1. Welcome and thank you for participation**

*I'd like to welcome you to our focus group this evening and thank you for your willingness to participate. My name is Melissa Reade and I am a Doctoral Candidate at the University of Northern Iowa.*

*I'd like to introduce D. L., who will be moderating the focus group this evening.*

*I'd just like to confirm that as you came in this evening, you should have completed a short information sheet. Your responses on those information sheets will be completely confidential.*

*Additionally, you should have signed a consent form indicating your willingness to participate in this focus group, as well as for permission to use any data collected from this evening's focus group.*

**2. Introduction purpose and context of focus group**

- a. *I have asked you to participate in this focus group as part of my dissertation research.*
- b. *The focus of my research is on the teachers' union. More specifically, it is focused on the political activities of the ISEA/ NEA and how they represented former or would-be members. As a PEI member, you may fall into either of those two categories.*
- c. *The focus of the discussion tonight will center on two different components:*
  - i. *Your membership choices related to PEI and ISEA/NEA*
  - ii. *ISEA and NEA political activities- Questions will be centered around six big ideas:*
    1. *Political action committee*
    2. *NEA Platform resolutions*
    3. *Political candidate endorsements*
    4. *Organizational affiliations*
    5. *Use of membership dues*
    6. *Diverse membership*
- d. *When questions about these six areas are posed, I will read a brief description introducing each section, as well as display it on a screen for you to read.*

### 3. Focus group protocol and ground rules

- a. *The focus group is your platform to share your thoughts. My role is to provide a brief description about the topic at hand and ask questions. I'd like you to do the talking and would like everyone to participate. I may call on you if I haven't heard from you in a while.*
- b. *There are no right or wrong answers. Every person's experiences and opinions are important. Please speak up whether you agree or disagree. I'd like to hear a wide range of opinions. Please be courteous to those who are speaking.*
- c. *With your permission, the focus group will be audio recorded. The purpose of the audio is to accurately capture your interactions and thoughts. What you say may be used in the dissertation or other published works. However, I will not identify anyone by name. Your identity will be completely confidential.*
- d. *I'd ask that you please be considerate of the confidential nature of the responses by other members of the focus group and encourage you not to repeat what is shared today.*

### 4. Participant introductions

*I'd like to take a quick minute to introduce ourselves. Please share your name, teaching background, how long you have been a member of PEI.*

### Membership Questions

#### PEI

1. **What factors influenced your decision to join PEI?**
2. **Were there specific advantages or differences to joining PEI that ISEA/NEA did not offer?**

#### ISEA/NEA

3. **If a former member of ISEA/NEA, what factors influenced your decision to previously join ISEA/NEA?**
4. **What factors influenced your decision to discontinue membership with ISEA/NEA?**
5. **Would you have chosen to be a member of a local teachers union (e.g., CFEA, WEA) if you would not have had to join ISEA/NEA also?**
6. **Do you define ISEA and NEA as a professional association or a union? Why?**

## Political Questions

The following questions are specifically about the national level political activity with NEA.

### A. Political Action Committee

*The NEA has established the NEA Fund for Children and Public Education- its political action committee. The NEA fund “works to ensure that pro-public education candidates are elected to public office by making direct contributions to candidates.” Additionally, the NEA has established the NEA Advocacy Fund –a super PAC with the intention of “raising funds in unlimited amounts.” Lastly, the NEA has established a strong political action arm devoted to voter identification programs, get out the vote efforts, ballot initiatives, and also employs full-time political staff and lobbyists, as well as coordinates campaigns with political parties.*

*Some NEA critics have charged that the NEA is a “big, powerful arm of the Democratic Party,” while NEA asserts they are involved in bipartisan politics. Additionally, some former and current NEA members believe the NEA should focus on education and stay out of politics.*

*During 2010, the NEA Advocacy Fund established itself as the fourth largest Super PAC and expended \$4,199,000 of their \$4,200,000 “in campaigns against Republicans.”*

- 1. How familiar are you with the NEA political activity?**
- 2. To what degree do you believe the NEA is engaged in bi-partisan politics, meaning do they support political issues and candidates representing both major political parties? What influences your thinking?**
- 3. To what degree do you believe the NEA’s should be involved in politics altogether? What influences your thinking?**
- 4. To what degree do you believe the NEA political activities help or hurt the cause of public education? What influences your thinking?**

### B. NEA Platform

*The NEA resolutions highlight statements that reflect NEA’s philosophical opinions, intentions, beliefs, positions, or calls for action. During the 2011-2012 school year, there were 362 resolution statements about education and non-education items that, in their words, represent the NEA’s “progressive public policy agenda.”*



1. What do you interpret “progressive public policy agenda” to mean?
2. If a former ISEA member, how would you describe your familiarity with the content of the NEA resolutions or the process by which they are adopted?
3. Based on what you know about the NEA platform, to what degree do you believe the NEA resolutions reflect your personal and political attitudes, beliefs, and values?
4. To what degree do you believe it is the role of the NEA to advance non-education social issues?

### C. Political Candidate Endorsement

*While the NEA leadership reports they act in a bipartisan fashion, NEA opponents believe their actions speak volumes about their allegiance politically. They believe the NEA provides an incongruent message about their political leanings. For example, of the \$30 million spent on federal campaign contributions by NEA between 1990 and 2008, 93% was allocated to Democratic candidates or the Democratic party. Additionally, the NEA has only endorsed Democratic candidates for president since its first endorsement of Jimmy Carter in 1976*

1. Do you think NEA should endorse political candidates on behalf of its membership? What influences your thinking?
2. Do you think the NEA trend in largely supporting Democratic candidates accurately reflects the political preferences of the NEA membership? What influences your thinking?
3. Do you believe NEA members who do not agree with the political endorsements of the NEA, have a voice that is heard? What influences your thinking?

### D. Organizational affiliations

*The NEA states a core service area is to “develop partnerships that engage the ethnic minority, labor, faith-based, environmental, philanthropic, educational, civil and human rights, and business communities to enhance our ability to achieve great public schools for every student.” Opponents argue that the membership dues fees “largely funded left-wing and non-education related causes,” while the NEA asserts they collaborate with and support education-friendly organizations.*

*Here are some examples of NEA organizational affiliations:*

Organization	Organization Purpose/Focus
America Votes (2014)	Advance progressive policies
American Constitution Society (2014)	Nurture the next generation of progressive professionals
Association of Community Organizations for Reform Now (ACORN) (2014)	Provided advocacy for low and moderate income families (now disbanded)
Ballot Initiative Strategy Center (2014)	Provide research and capacity building for progressive ballot initiatives
Campaign for America's Future (2014)	Provide policy research for progressives
Catalist (2014)	Provide communications for progressive mobilization
Committee On States (2014)	Strengthen state progressive political networks
Democratic GAIN (2014)	An association for progressive organizations
Democratic Leadership Council (2014)	Modernizing progressive political traditions
Netroots Nation (2014)	Amplify progressive voices through technology
People for the American Way (2014)	Equip communities to promote progressive policies and programs
Planned Parenthood	Provide sexual and reproductive healthcare
US Action (2014)	Provide civic education and mobilization to elect progressive champions

- 1. How familiar are you with the organizations that the NEA developed partnerships with or provided “contributions, gifts, and grants?”**
- 2. How do you feel about NEA membership dues being used to support these types of organizations and partnerships?**
- 3. Do you believe the issues/platforms represented by these organizations reflect the beliefs and values of the average NEA member?**

## **E. Transparency: Use of Membership Dues**

*In 2010, the NEA collected \$362,480,000 in membership dues and fees. NEA states that no membership dues are utilized for political activities, however, many opponents of teachers' unions claim the NEA diverts membership dues to political activities.*

*Two examples of how membership dues are allocated:*

- *12% of membership dues are allocated for Partnerships and Public Relations with “diverse supportive organizations,” mentioned previously.*
- *11% of membership dues supports Legislative and Ballot Initiative Action, including “bipartisan support for public education that includes lobbying, government relations, state ballot initiatives and legislative crisis fund, cyber lobbyists, members’ education and mobilization on political issues.”*

- 1. To what degree do you believe membership dues and fees should be used to support political action? What influences your thinking on this?**
- 2. If a former ISEA/NEA member, what level of scrutiny did you use when analyzing how your ISEA and NEA dues dollars were spent?**
- 3. If you opted not to join ISEA/NEA, did how the ISEA/NEA allocates dues politically weigh into your decision not to join?**
- 4. What types of things do you believe membership dues and fees should be allocated towards?**

## **F. Diverse Membership**

*Many polls have concluded that the NEA has a more diverse population of members than once thought. The NEA has identified a disconnect between at least 1/3 of its membership, meaning that a minimum of 1/3 of the members are not in alignment with the political activities and social platform of the NEA.*

*In a 2006 survey by the NEA, 55% of teachers considered themselves “conservative or tends to be conservative” and have reported themselves as politically conservative over politically liberal in every survey since 1971. Additionally, 41% reported themselves as Democrats, 29% as Republican, 2 as “other,” and 29% had no affiliation.*

*Many former and current members have voiced the concern that NEA “is divorced from the concerns of rank-and-file members.”*

1. **If a former ISEA/NEA member, how do you feel about that last statement?**
2. **If a former ISEA/NEA member, to what degree did you feel disenfranchised or unrepresented by the NEA?**
3. **Based on your knowledge and experiences, do you believe the ISEA/NEA political activities represent its average member?**

### **Wrap Up**

1. *That wraps up our formal questions. Is there anything else you would like to add about anything we have talked about tonight?*
2. *Your input tonight will be used to guide the remainder of my dissertation research. Specifically, it will help in the development of the survey focused on these very issues that all PEI members will have an opportunity to complete.*
3. *I'd like to thank you for your time and thoughts. My best to you in your educational ventures.*

## APPENDIX G

## SURVEY PROTOCOL

**PEI Survey - PEI Member Perspectives about NEA Political Activities****1. University of Northern Iowa Human Participants Review Survey Informed Consent****Project Title: PEI Member Perspectives about NEA Political Activities****Name of Investigator(s): Melissa Reade**

**Invitation to Participate:** You are invited to participate in a research project conducted through the University of Northern Iowa. The University requires that you give your signed agreement to participate in this project. The following information is provided to help you make an informed decision about whether or not to participate.

**Nature and Purpose:** The purpose of this mixed-methods study is to examine the attitudes, beliefs, and values of current PEI members who either previously opted to join ISEA or who bypassed ISEA altogether. Specifically, this study aims to understand the factors related to the NEA political activities that may have influenced their membership decisions. Lastly, this study will further explore the degree to which former ISEA members were aware, involved, and aligned with NEA political activities.

**Explanation of Procedures:** As part of this study, you have been asked to participate in a survey. The following procedures will take place:

1. The online survey will consist of a series of questions in which you will be given multiple choice answers. You will simply click on the answer that most reflects your thinking about the issue in each question.
2. The online survey will take approximately 5-10 minutes to complete.

**Benefits and Compensation:** Participants will not be compensated for their time by completing this survey. However, those who participate in the survey will have the opportunity to be entered in a randomized drawing for a \$100 Visa Check Card. Two names will be drawn at random and each will receive a \$100 Visa Check Card. To qualify for the drawing, participants must provide their name and email at the end of the survey, as winners will be notified via email in the event their name is drawn. Your name and email will be stored in a separate data base, so that the survey information you provide remains anonymous.

**Discomfort and Risks:** There are no foreseeable risks to participation in the online survey.

**Confidentiality:** Information obtained during this study, which could identify you will be kept confidential. All data gathered will be de-identified, allowing for complete anonymity of you, your community, and your school district. The summarized findings with no identifying information may be published in an academic journal or presented at a scholarly conference. The survey will be accessed online. As such, your confidentiality will be maintained to the degree permitted by the technology used. Specifically, no guarantees can be made regarding the interception of data sent via the Internet by any third parties.

**Right to Refuse or Withdraw:** Your participation is completely voluntary. You are free to withdraw from participation at any time or to choose not to participate at all, and by doing so, you will not be penalized or lose benefits to which you are otherwise entitled.

**Questions:** If you have questions about the study or desire information in the future regarding your participation in the study generally, you can contact Melissa Reade at 563-880-4190. You can also contact the office of the IRB Administrator, University of Northern Iowa, at 319-273-6148, for answers to questions about rights of research participants and the review process.

**Agreement:**

I am fully aware of the nature and extent of my participation in this project as stated above and the possible risks arising from it. I hereby agree to participate in this project. I acknowledge that I have received a copy of this consent statement. I am 18 years of age or older.

Do you agree with the information in this consent form?

- Yes, I agree to the information in the consent form.
- No, I do not agree to the information in this consent form.

**MEMBERSHIP INFORMATION**

**2. Including the current year, how long have you been a member of Professional Educators of Iowa (PEI)?**

- Less than 1 year
- 1-5 year
- 6-10 year
- 11-15 years
- 16-20 years
- 21-25 years
- 26-30 years
- 30 years+

**3. Have you ever been a member of the Iowa State Education Association (ISEA) and National Education Association (NEA)?**

- No  
 Yes

**NO PREVIOUS ISEA/NEA MEMBERSHIP**

**This series of questions is applicable only to those PEI members who have not previously belonged to ISEA/NEA.**

**4. Which factors influenced your decision to NOT join ISEA/NEA at all? (check all that apply)**

- Pressure to join turned me away from ISEA/NEA  
 Cost of ISEA/NEA membership was too high  
 Concern of how my dues would have been allocated  
 Connotation of ISEA/NEA as a union  
 The political activity of ISEA/NEA did not align with my values and beliefs  
 The disconnect between ISEA/NEA from our local needs and issues  
 ISEA/NEA focused too much on non-education issues  
 Traditional union tactics employed by ISEA/NEA detracted from the profession (e.g., grievances, seniority, no confidence votes)  
 Concern that ISEA/NEA supports poor teachers  
 Concern that ISEA/NEA supports the status quo in education  
 The adversarial relationship with the school district promoted by ISEA/NEA  
 ISEA/NEA lacked the necessary professional resources to support me as an educator  
 I simply was not interested in joining.  
 An alternative professional organization was more appealing to me (e.g., PEI)

**Other:**

**5. On a scale of 1-7, how much did ISEA/NEA political activity influence your decision NOT to join ISEA/NEA?**

---

1	2	3	4	5	6	7
ISEA Political Activity made no difference in not joining					ISEA political activity was the primary reason for not joining	

**Comment:**

**6. If politics played a key role in your decision not to join ISEA/NEA, which aspects of the political activity were of most concern to you? (Check all that apply)**

- Use of membership dues toward political issues and candidates
- Political candidate endorsements
- Political party affiliation
- Resolutions and platform statements
- Social issues that were promoted
- Organizations they were affiliated with
- Not applicable

**Other:**

**7. Which statement do you agree with most?**

- I would have joined my local teacher's union if I was not forced to join ISEA and NEA.
- I would not have joined my local, ISEA or NEA for any reason.

**Comment:**

**8. Did you inquire with your local union representatives about joining at the local level only?**

- Yes
- No

**Comment:**

**9. If you had joined the ISEA/NEA, what percentage of membership dues should be allocated to the local, ISEA, and NEA respectively (Please enter a percentage in each box with all boxes totaling 100%)**

- Local \_\_\_\_\_
- ISEA \_\_\_\_\_
- NEA \_\_\_\_\_



**10. If you had joined ISEA/NEA, what do you think your dues should have been spent on?**

- Political activity
- Local issues only (e.g., negotiations, contracts, grievances)
- State issues in education
- National issues in education
- Professional development
- Supporting families/students

**Comment:**

**11. To what degree do you still receive pressure to join the union in your district?**

- No pressure
- Minimal pressure
- Moderate pressure
- Significant pressure

**Comment:**

**12. Would you ever characterize the pressure to join as harassing or bullying in nature?**

- Yes
- No

**Comment:**

**13. Do you view ISEA/NEA as.....**

- A union
- A professional association

**Comment:**

**14. At any time did you ever experience the following emotions due to your choice NOT to join ISEA/NEA? (Check all that apply)**

- Frustration
- Guilt
- Anger
- Embarrassment
- Surprise
- Disappointment
- Fear

**Comment:**

**PREVIOUS ISEA/NEA MEMBERSHIP**

**This series of questions is applicable only for PEI members who were previously members of ISEA/NEA.**

**15. How long were you an ISEA/NEA member?**

- Less than 1 year
- 1-5 years
- 6-10 years
- 11-15 years
- 16-20 years
- 21-25 years
- 26-30 years
- 31 years+

**16. What best describes your level of participation as an ISEA/NEA member?**

- Uninvolved and simply paid dues
- Average member
- Activist
- Leadership

**JOINING ISEA/NEA**

**17. Which factors influenced your decision to join ISEA/NEA. (check all that apply)**

- Continued my student membership
- Felt pressured to join
- Believed I had no choice
- I was told something like, "It's just what you do"
- To support the local union's efforts
- To support the state and national union efforts
- To support the union's political activity
- Liability insurance/protections
- Financial incentives (e.g. sign up bonus, loan, credit card, life insurance, discounts)
- I didn't want to be perceived as a freeloader
- The professional nature of the union
- Professional resources provided by the union

**Other:**

**18. On a scale of 1 to 7, how much did ISEA/NEA political activity influence your decision to become an ISEA/NEA member?**

---

1	2	3	4	5	6	7
ISEA Political Activity made no difference in joining					ISEA political activity made significant difference in joining	

**Comment:**

**DISCONTINUING ISEA/NEA MEMBERSHIP**

**19. Which factors influenced your decision to discontinue membership with ISEA/NEA? (Check all that apply)**

- Pressure to join turned me away from ISEA/NEA
- I later learned ISEA/NEA membership was not required
- Cost of ISEA/NEA membership was too high
- Concern of how my dues were allocated
- Connotation of ISEA/NEA as a union

- Dissatisfaction with ISEA/NEA leadership at local, state, or national level
- The political activity of ISEA/NEA did not align with my values and beliefs
- The disconnect between ISEA/NEA from our local needs and issues
- ISEA/NEA focused too much on non-education issues
- Traditional union tactics employed by ISEA/NEA detracted from the profession (e.g., grievances, seniority, no confidence votes)
- Concern that ISEA/NEA supports poor teachers
- Concern that ISEA/NEA supports the status quo in education
- The adversarial relationship with the school district promoted by ISEA/NEA
- The union lacked the necessary professional resources to support me as an educator
- I was no longer interested in being a part of ISEA/NEA
- An alternative professional organization was more appealing to me (e.g., PEI)

**Other:**

**20. On a scale of 1-7, how much did ISEA/NEA political activity influence your decision to discontinue ISEA/NEA membership?**

1	2	3	4	5	6	7
ISEA Political Activity made no difference to discontinue					ISEA political activity was a primary reason for discontinuing	

**Comment:**

**21. If politics played a key role in your decision to end your membership with ISEA/NEA, which aspects of the political activity were of most concern to you? (Check all that apply)**

- Use of membership dues toward political issues and candidates
- Political candidate endorsements
- Political party affiliation
- Resolutions and platform statements
- Social issues that were promoted
- Organizations they were affiliated with
- Not applicable

**Other:**

**22. Which statement do you most agree with?**

- I would have stayed a member of my local teachers' union if I was not forced to join ISEA and NEA
- I would have discontinued membership with ISEA/NEA no matter what

**Comment:**

**23. Did you inquire with your local union representatives about joining at the local level only?**

- Yes
- No

**Comment:**

**24. If you had remained a member, what percentage of membership dues should be allocated to the local, ISEA and NEA respectively? (Please enter a percentage in each box, with all boxes totaling 100%)**

- Local \_\_\_\_\_
- ISEA \_\_\_\_\_
- NEA \_\_\_\_\_

**25. If you had remained a member of ISEA/NEA, what do you think your dues should have been spent on?**

- Political activity
- Local issues only (e.g., negotiations, contracts, grievances)
- State issues in education
- National issues in education
- Professional development
- Supporting families/students

**Other:**

**26. To what degree do you still receive pressure to join the union in your district?**

- No pressure at all
- Minimal pressure
- Moderate pressure
- Significant pressure

**Comment:**

**27. Would you ever characterize the pressure to join the union as bullying or harassing in nature?**

- Yes
- No

**Comment:**

**28. Do you view the ISEA/NEA as:**

- A union
- An association

**Comment:**

**29. Did you ever experience the following negative emotions as a result of joining ISEA/NEA or discontinuation of membership with ISEA/NEA? (check all that apply)**

- Frustration
- Guilt
- Anger
- Embarrassment
- Surprise
- Disappointment
- Fear

**Comment:**

**NEA PLATFORM**

**The NEA has identified resolutions outlining philosophical opinions, intentions, beliefs, or positions that may call for action or may indicate support for or opposition to federal legislation. These resolutions are to be "consistent with the goals of the Association as stated in the Preamble." The 2011-2012 NEA Resolutions consisted of 362 resolutions with issues both related and unrelated to public education.**

**30. As a former ISEA/NEA member, were you aware of the NEA adopted resolutions describing their political and social platform?**

- Yes
- No

**Comment:**

**31. While many of these resolutions are focused on education, many may be characterized as having no direct tie to education and what happens in classrooms (e.g., capital punishment, tax reform, nuclear freeze, covert operations & counter intelligence, extremist groups, Hawaiian land ownership). Were you aware of the non-education related platform items promoted by NEA?**

- Yes
- No

**Comment:**

**32. Did you believe you could influence the NEA platform and adoption of resolutions?**

- Yes
- No
- It wouldn't have mattered if I tried
- I didn't want to
- I'm not sure

**Comment:**

**33. To what degree do you believe the ISEA/NEA platform aligned with your personal values and priorities about issues not directly tied to education?**

- Unaligned
- Somewhat aligned
- Aligned
- I don't know

**Comment:**

**34. What did you do when ISEA/NEA took political positions that you disagreed with or endorsed candidates you didn't want to support?**

- I didn't do much of anything,
- I spoke up at meetings
- I worked to change their policies/stances
- I dropped my membership with ISEA/NEA
- Not applicable

**Other:**

**POLITICAL ACTION COMMITTEE AND POLITICAL CANDIDATES**

**NEA established the NEA Fund for Children and Public Education Political Action Committee (PAC) with the intent of providing direct financial support to political candidates. The NEA fund “works to ensure that pro-public education candidates are elected to public office by making direct contributions to candidates” who are recommended by the NEA Fund Council, the NEA Fund’s governing body.**

**35. As a former ISEA/NEA member, were you aware of the NEA Fund for Children and Education Political Action Committee (PAC)?**

- Yes
- No

**Comment:**





**NEA ORGANIZATIONAL AFFILIATIONS**

The NEA states a core service area is to "develop partnerships that engage the ethnic minority, labor, faith-based, environmental, philanthropic, education, civil and human rights, and business communities to enhance our ability to achieve great public schools for every student."

**40. How aware were you that NEA used membership dues to provide contributions, gifts, and grants to select organizations with a "progressive" agenda (e.g., Planned Parenthood, ACORN, Democratic Leadership Council)?**

- Very unaware
- Unaware
- Aware
- Very aware

**Comment:**

**41. Do you believe ISEA/NEA should use membership dues to provide contributions, gifts, or grants to outside organizations removed from local interests?**

- Yes
- No

**Comment:**

**42. Do you believe the issues/platforms represented by these organizations reflect the beliefs and values of the average ISEA/NEA member?**

- Yes
- No
- I don't know

**Comment:**

**OVERALL OPINION QUESTIONS**

**43. To what degree are educators willing to research how their ISEA/NEA membership dues are allocated?**

- Educators do little to no research and have no idea how their membership dues are spent
- Educators might do a little research, but don't know for sure how their membership dues are spent
- Educators do research and know how their membership dues are spent

**Comment:**

**44. To what degree do you believe ISEA/NEA leaders willingly inform potential members about how membership dues are allocated and the political activities of the organization at all levels (local, state, national)?**

---

1	2	3	4	5	6	7
No interest in providing info			Supply info if asked			Willing to provide info

**Comment:**

**45. How AWARE is the average ISEA/NEA member of ISEA/NEA political action?**

- Very unaware
- Unaware
- Aware
- Very Aware

**Comment:**

**46. How INVOLVED is the average ISEA/NEA member with ISEA/NEA political action?**

- Very uninvolved
- Uninvolved
- Involved
- Very involved

**Comment:**



**51. What political affiliation would the average ISEA/NEA MEMBERS most often align with?**

- Liberal
- Moderate
- Conservative

**Comment:**

**52. What political affiliation would ISEA/NEA LEADERS most often align with?**

- Liberal
- Moderate
- Conservative

**Comment:**

**53. On the following 7-point scale, please choose where you believe the ISEA/NEA organization is in terms of political ideology.**

---

1	2	3	4	5	6	7
Very liberal			Moderate			Very conservative

**Comment:**

**54. Where do you believe ISEA/NEA's focus is most directed and aims to benefit educators or students?**

---

1	2	3	4	5	6	7
Educators primarily			educators/students equally			Students primarily

**Comment:**



**58. Including the current year, how long have you been working in the education field?**

- Less than 1 year
- 1-5 years
- 6-10 years
- 11-15 years
- 16-20 years
- 21-25 years
- 26-30 years
- 31 years+

**59. What best describes the level of the building where you work?**

- Preschool
- Elementary
- Middle School/Jr. High
- Senior High

**60. What best describes the size of the district where you work?**

- Rural
- Suburban
- Urban

**61. What best describes the type of district you work at?**

- Public
- Private
- Parochial

**62. Are you...**

- Male
- Female

**63. Are you of Hispanic, Latino, or Spanish origin?**

- No
- Yes, Mexican, Mexican American, Chicano
- Yes, Puerto Rican
- Yes, Cuban
- Yes, another Hispanic, Latino, or Spanish origin

**64. What is your race?**

- White
- Black, African American
- American Indian or Alaska native
- Asian or Asian American
- Pacific Islander

<b>Other:</b>
---------------

**65. Which best represents your highest level of education attained?**

- Associates
- Bachelors
- Masters
- Specialists
- Doctorate

<b>Other:</b>
---------------

**66. What best describes your political orientation?**

- Liberal
- Moderate
- Conservative
- No political orientation

<b>Other:</b>
---------------





APPENDIX H  
SENSITIVE INFORMATION DATA COLLECTION

**PEI Sensitive Information for the Random Drawing Entry**

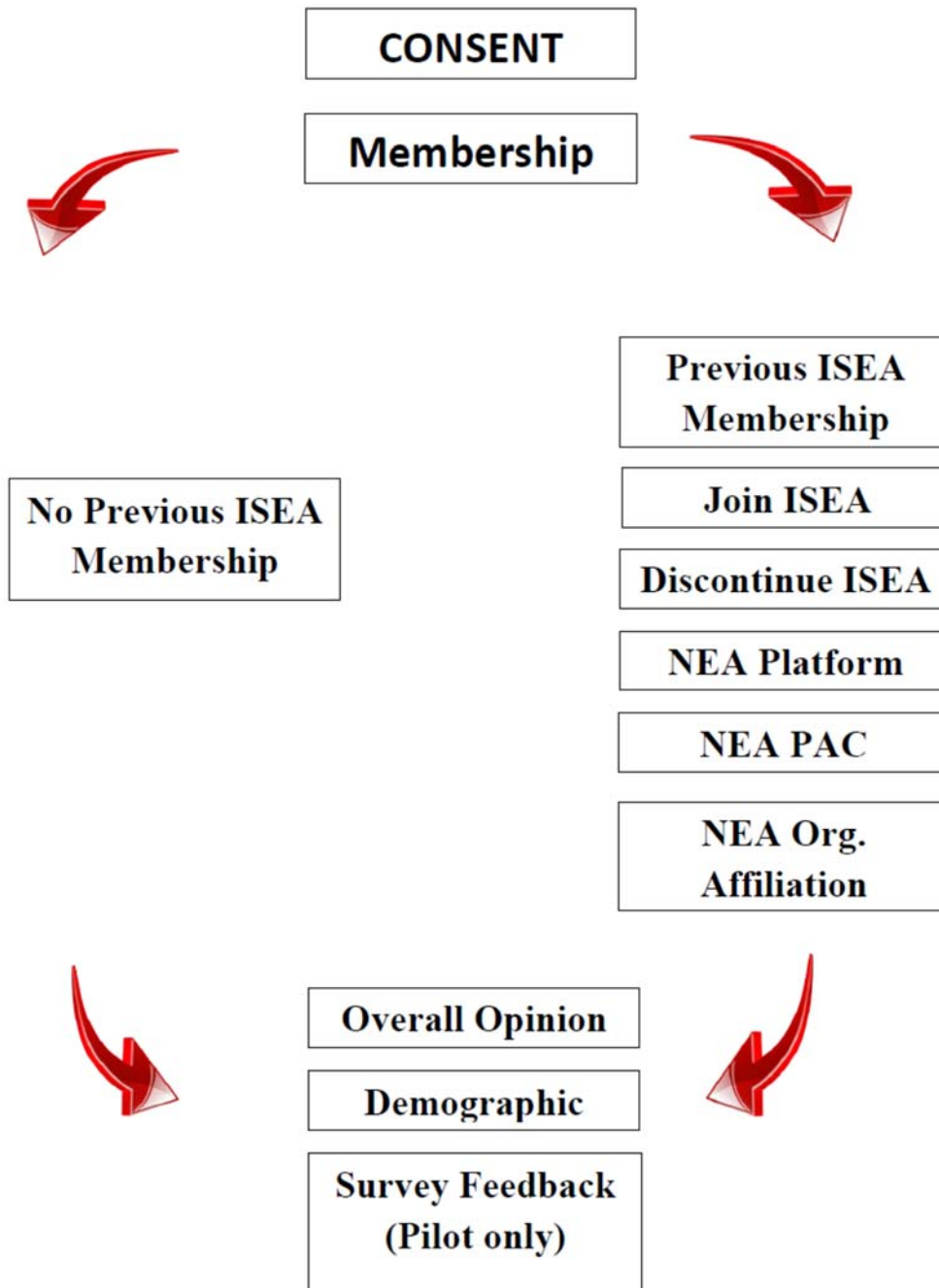
If you are interested in entering the random drawing for a \$100 Visa Check Card, participants must provide their name and email at the end of the survey. Winners will be notified via email in the event their name is drawn. Your name and email will be stored in a separate data base, so that the survey information you provide remains anonymous.

**Contact information**

Name

Email

APPENDIX I  
SURVEY FLOW CHART



APPENDIX J  
PEI LETTER OF COOPERATION



May 16, 2012

Melissa Reade  
1045 Barrington Drive  
Cedar Falls, IA 50613

Dear Melissa,

Professional Educators of Iowa is pleased to collaborate with you on your project, "PEI Member Perspectives About ISEA and NEA Political Activities." Please consider this communication as our Letter of Cooperation.

We understand that PEI members participating in this research may choose to be involved in a focus group, a pilot survey, a survey, and/or an individual interview. Although we are encouraging of their involvement, we understand that any involvement on the part of PEI members is completely voluntarily.

We have had ample opportunities to discuss the research with you and ask for clarifications. Furthermore, key personnel for this project will maintain confidentiality of all research participants in all phases of this project.

According to our agreement, project activities will be carried out as described in the research plan reviewed and approved by the University of Northern Iowa Institutional Review Board.

We look forward to working with you.

Sincerely,

Jim Hawkins  
PEI Director

974 73<sup>rd</sup> St. Suite 14, Windsor Heights, Iowa 50324  
515-221-2330, [www.peiowa.org](http://www.peiowa.org)