

THE CHALLENGE OF LEADING TWO GENERATIONS WITHIN THE TEACHERS UNION

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Few would dispute that teachers unions are major players in public education today. They influence how much money schools have, who gets what, how time is used, and what teachers and administrators may or must do. Many people think that teachers unions are national, monolithic organizations whose leaders dictate the policies and practices of each local affiliate, including the details of each local's contract. In fact, the U.S. has thousands of local teachers unions, each of which bargains a contract with its school board. Every local union is legally independent and elects its own president. Thus, each president has great potential to influence what the local organization stands for and does. A president can recommend new priorities, shape the labor relationship, promote new approaches to bargaining, and propose original contract language. At the same time, presidents are elected by members and must attend to their concerns. Despite their importance, little is known about who these local union presidents are and how they approach their role.

Union presidents today work in a rapidly changing educational context. Since the mid-1990s, state accountability policies and the federal *No Child Left Behind* Act have intensified pressures on schools to succeed with all students. Many of the reforms that policy analysts advance have implications for the local teachers contract and the work

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that teachers do. Reforms might require teachers to accept new responsibilities, work a longer school day or year, assume new roles as instructional coaches or lead teachers, be evaluated on the basis of their students' performance, or relinquish the guarantee of a standardized salary scale. Day to day, local union leaders play a key role in determining how their union responds to these initiatives. Understanding how presidents approach their jobs can offer insight into the future of these reforms.

At the same time that schools are responding to reform efforts, the US teaching force is undergoing a transformation. In 1999 analysts projected that 2.2 million teachers will retire between 2000 and 2010 (Hussar). Among the teachers leaving the classroom are the individuals who established local unions in the 1960s and 1970s, when states first passed collective bargaining laws for public employees. Many of these teachers participated in their union's initial efforts to gain a voice at the local level. Some took part in strikes and walked picket lines. For the past 35 to 40 years, local union presidents could count on the steady support of those early members, but the future is less certain.

In this study, we consider how turnover in the teaching force and the consequent changes in union membership are shaping the challenges that local union leaders face and the strategies they adopt for leading their organizations. We begin by reviewing selected studies about teacher unionism and demographic changes in the profession, topics that serve as the foundation for this research. We then explain our research design and describe our interview sample. We turn next to the presidents' descriptions of the generational divide within their union and explore their efforts to lead cohorts of novice and veteran teachers. We conclude by discussing the challenges to leadership that a divided union presents.

Research Context

Despite the acknowledged importance of teacher unionism, researchers have paid surprisingly little attention to the topic (Hannaway & Rotherham, 2006). Although small, the body of research that does exist considers a range of topics. Various studies catalogue and analyze contract contents (Johnson & Kardos, 2000; Hess & Kelly, 2006); examine how collective bargaining affects pay, working conditions (Lipsky, 1983; Eberts and Stone, 1984); examine how contract provisions affect local educational practices (Levin, J., Mulhern, J., & Schunck, J., 2005; Kerchner and Mitchell, 1980; Johnson, 1984) or student performance (Hoxby, 1996; Goldhaber, 2006); and present case studies of key districts where parties have advanced reforms (Kerchner & Koppich, 1993).

A few studies, conducted soon after unions were established, focused on teachers' propensity to unionize and to endorse militant actions (Winick, 1963; Cole, 1969; Rosenthal, 1969; Alutto & Belasco, 1976; Hellriegel, French, and Peterson, 1976). Overall, early researchers found that support for unions and militant action was greater among male, younger, and secondary school teachers than it was among female, older, and elementary school teachers. Because this line of research largely ended after the 1970s, little is known about the views of teachers union members today other than what the unions, themselves, report. Moreover, there has been no systematic study on elected local union presidents and their work.

Although there is little current research about teachers union members, there is a growing body of research about new teachers. The realities of teacher demographics have created two large cohorts of teachers – veteran teachers nearing the ends of their careers and new teachers who recently entered the classroom. This U-shaped distribution, with

relatively few mid-career teachers, creates two cohorts with substantially different priorities. Teachers entering schools today differ notably from those who are currently retiring (Blair, 2002; Johnson & The Project on the Next Generation of Teachers, 2006). Teachers in the retiring cohort were hired in the late 1960s and early 1970s, when many other careers were closed to women and to men of color. At the time, teaching provided a path to respectable, professional work for these well-educated individuals. The veterans currently retiring are the first cohort of teachers in the U.S. to have made a lifelong career in teaching (Grant & Murray, 1999).

The cohort of teachers entering schools today choose to teach in an entirely different labor market and social context. Today, all career options, including engineering, business and law, are open to the women and men of color who traditionally became teachers. Alternative professions often provide higher pay, better working conditions, greater status, and more opportunities for career advancement than teaching does. Three decades ago, most people chose a career for the long term, while today many—including teachers—anticipate having a series of short-term careers over a lifetime (Editors, 2000). Therefore, new teachers today have many employment options and, if their schools fail to provide what they need in order to be successful, they are likely to leave rather than wait for their union to improve working conditions. Thus, they often make a tentative or limited commitment to the classroom (Johnson & Birkeland, 2003; Peske, Liu, Johnson, Kauffman, & Kardos, 2001).

Much like their attitudes towards the profession, new teachers' commitment to the teachers union is also likely to be tentative and short-term. One of the most striking differences between teachers from these two generations is in how they view unions

(Kahlenberg, 2006). As states began to authorize bargaining for teachers in the late 1960s, it was today's veterans who voted to join a union and to select which organization would represent them (Kahlenberg, 2006). They elected leaders from among their ranks to bargain contracts on their behalf or assume roles as building representatives and union officers. When their unions resorted to strikes in order to force management to bargain with them or grant concessions during negotiations, these teachers walked the picket line. Many may have been ambivalent about joining the union but most paid their dues in the hope that their local leaders could improve salaries and working conditions while protecting them from administrative favoritism and abuse.

New teachers today have no memories of schools as they were before teachers unions, and they live in a society where union membership in the private sector has declined steadily (Farber, 2006). Some who doubt that unions effectively serve either students or teachers think that uniform pay and standardized practice limit individual initiative and reinforce mediocre performance. Also, they seem to express far less support than their veteran peers for the union's traditional efforts to protect job security, exert political influence, or ensure a predictable salary over time (Blair, 2002; Kahlenberg, 2006).

Such reported differences between new and veteran teachers led us to wonder whether members of this new generation of teachers will reject unions as adversarial relics of the past or transform them into new organizations with different priorities. Will changes in the teaching force lead to changes in local unions' priorities and practices? And how will local union leaders adjust to these changing realities?

Purpose and Design of the Study

We began this research in an effort to understand the role of local union leaders today as they work in a demanding and rapidly changing educational context. The full study (Johnson, Donaldson et al., 2007) explored a wide range of topics about the local presidents' agendas, efforts, and accomplishments. This paper reports on one aspect of the study, the union presidents' approaches to leading their members. Research questions guiding this analysis are:

- How do recently-elected presidents describe the priorities and expectations of teachers in their local union?
- What challenges do these presidents face as they seek to lead cohorts of new and veteran members, and how do they approach those challenges?

In choosing a sample of presidents to interview, we took a number of factors into account. First, we wanted to explore the views of presidents from a wide range of state and local contexts. Therefore, we first chose a group of six states—California, Colorado, Florida, Massachusetts, Maryland, and Ohio—which provided variation in geographical location, state labor laws, and political context. Within each state we concentrated our sample in one region so that we could maintain consistency in the relevant labor market. We sought to include districts of various types and sizes (urban, suburban, and rural; small, medium, and large; growing and declining in size) both within each state and across the entire sample. We included local affiliates of both the National Education Association (NEA) and American Federation of Teachers (AFT) within each state except Florida, where the two organizations have merged. We wanted to ensure that our sample would include presidents who hold a range of views and work in settings with different types of labor-management relationships, from adversarial to collaborative. Therefore, in

selecting our sample, we consulted with national experts and state union officials and analyzed local news reports. In an effort to understand what current teachers expect from their union leaders, we sought to interview presidents who had been first elected within the past 8 years. Between May and September 2006, we interviewed a total of 30 presidents—28 in their local setting and 2 by phone because they were unavailable when we visited their state.

A deliberately chosen sample was appropriate for a study of this size, because our aim was to understand the range of these presidents' experiences. Our findings cannot be generalized to all union leaders, despite our efforts to choose a diverse sample of people, unions, and settings. However, these presidents' accounts offer rich insight into the perspectives, challenges, and choices of union leaders today. The details of the methodology are included in Appendix I. The participating presidents are listed in Appendix II.

The Union Presidents

Although these presidents had all been elected during the preceding eight years, they were, as a group, much closer in their career to retirement than to entry. They had been teachers for as few as 7 and as many as 37 years. On average, the group had 25 years experience in teaching. With very few exceptions, they had spent their entire careers in the same district. All were first-time presidents except two; those from Chula Vista, CA and Glades County, FL also had served as president approximately 15 years earlier. At the time of the interview, 18 in the sample were serving their first term as president, and the remainder had been re-elected at least once. The presidents ranged in age from 29 to over 60, although most were in their mid-50s. In a field where

approximately 80% of teachers are women, this group was nearly balanced by gender, with 16 women and 14 men. There were 22 Whites, 5 African Americans and 3 Hispanics.

With few exceptions, the presidents had joined the union early in their careers and then gradually assumed more responsibility by taking on leadership roles or running for office. When they ran for president, most were serving as vice president—next in line for the head position. Others competed for the presidency when the person who was expected to run chose not to. Some presidents said that they had challenged the inside favorite because they had been dissatisfied with their current officers, who they thought were not sufficiently honest, collaborative, active, or focused on the most critical issues.

A Divided Membership

With very few exceptions, these presidents told of a union membership divided along generational lines by past experience and current concerns. As Rhonda Johnson, of the Columbus, OH union observed, “We’re running a couple of parallel organizations.” While their veteran members expect the union to champion their causes, many presidents reported that novices feel few ties to the union. This limited commitment arises for several reasons: different generational priorities, high turnover, lack of due process protections for non-tenured novices, and union engagement in activities they do not support.

The presidents reported that their veteran members easily recall the union’s early struggles in the 1960s and 1970s to win bargaining rights and basic professional protections. Since then, many of these teachers have remained in the classroom and steadily (though often by small increments) moved up the salary scale. Today, veterans

have no worries about job security because they have long had tenure under state law. However, they do expect their local union to make their salary a priority, especially since it will determine their retirement benefits. In addition, several presidents said that experienced teachers resent current demands for instructional conformity, which they believe limit their freedom to teach what they want and sometimes introduce extensive administrative responsibilities. Notably, no president said that these veteran teachers question the need for a union.

By contrast, presidents widely reported that new teachers are not, as Frederick County, MD's Gary Brennan said, "into the whole union mentality as some of the older members are." Sherrill Neilsen of Needham, MA observed, "Unions are not even on their radar screen." Susan Brooks, president in Mount Healthy, OH, one of the smallest districts in the study, was dismayed that her new members did not know about the strike that long ago secured their contract: "They just don't get what a gift that master contract is."

The presidents offered various explanations for their new members' lack of interest in the union or traditional union priorities. Some, like Chula Vista, CA's Jim Groth, thought that newer teachers were turned off by the confrontational, disrespectful labor-management relationships they had observed. He said that an active group of newer teachers had announced that they wanted to "get along with the district" and had worked to reframe the issues in a previous union election to focus on more professional matters. Denver President Kim Ursetta observed that "new teachers are more interested in the professional association role." She said that they think, "What are you going to do to help me grow as a professional? . . . How can you meet my needs?"

Both Montgomery County, MD's Bonnie Cullison and Los Angeles' A.J. Duffy remarked that newer teachers were troubled by the widely-held belief that the union protects poor teachers. Presidents also said that new teachers remained unconvinced that they, themselves, would ever need the union's protection. Collier County, FL's Von Jeffers said new teachers in his district believed that "the union is only there to protect bad teachers. 'Well, I don't need the union. I'm the best teacher ever.'" Presidents acknowledged that the union could offer no protection to novices in the growing number of districts where probationary teachers had no due process rights under state law and could be dismissed summarily without explanation. Thus, some presidents said they could not ask for new teachers' loyalty in exchange for legal representation.

Others said that newer teachers were not interested in the union because they did not expect to have a lengthy career in teaching. Miami-Dade's Karen Aronowitz observed, "When you're in your 20s, who ever thinks you're really going to retire? And then if you're not staying in the profession, never mind. It's just not an issue." Other presidents explained that it was hard to get new teachers' attention simply because the early years of teaching are so challenging: "Their first priority is keeping their head above water" (Tom Lynch, Westminster, CO); they are "struggling to get a grip" (Aronowitz, Miami-Dade); they are "just trying to survive" (Gary Brennan, Frederick County, MD).

Many presidents suggested that teachers of this new generation believe that, as dues-paying members, they are entitled to the union's attention, and yet they feel no obligation to support its activities. Columbus, OH's Johnson noted that new teachers there expected the union to "take care of their needs right away.... And if you don't then,

‘Okay, [Columbus Education Association], why am I paying my money?’” Other presidents said that new teachers expected their union to shift from favoring the more experienced teachers to favoring them. For example, President Lori Maag said new teachers in Greeley, CO wanted more of the district’s pay raises committed to the initial steps of the salary scale. In the much larger district of Broward County, FL, Patrick Santeramo said that new teachers wanted “money, money, money, money” and had asked the union to reach out to property owners and developers so that they could afford to live in the district.

Finally, some presidents said that new teachers objected to the political action of the local union’s national or state affiliate in supporting pro-union candidates or issues (such as abortion or gun control) not directly tied to education. Howard County, MD President Ann DeLacy said that new teachers there were inclined to be “apolitical.” Los Angeles’ Duffy observed that 30 to 35 percent of California’s new teachers are Republicans rather than Democrats, the traditional party of unions. When Duffy visited schools, he encountered “a discernible number of most new teachers who say ‘I’m tired of the union supporting candidates that I don’t support.’”

Thus, although the very concept of unionism implies a single set of shared principles and priorities, these presidents told of serving a union composed of two distinct groups—novices and veterans. They widely reported that new teachers joining today do not share the same views as the veterans they replace. They described novice teachers whose views do not align with the traditional union positions on seniority, standardized pay, or uniform roles for teachers. Instead, they expect support for their teaching through professional development; the express interest in career ladders; and they want a

compensation system based on more than seniority and credentials—one that allows them to prove their worth and be rewarded for their contributions. The presidents said that many new teachers have to be convinced to join the union, and that very few express interest in leading it.

Responding to different sets of expectations

Thus, union leaders today confront the competing interests of novice and veteran cohorts. From new teachers, they encounter indifference about the union and entitlement to its services. From veteran teachers, who are very unlikely to quit the union, they hear demands to focus contract negotiations on increasing retirement benefits and reducing administrative claims on their time. Notably, because new teachers might never join the union without a concerted effort to recruit them, the challenge of signing up new members becomes a high priority.

The presidents described intensive initiatives to recruit new teachers, who as members might then ensure the union's long-term viability and continued political influence. Recruitment drives were especially important in Florida and Colorado, which prohibit local unions from charging non-union teachers an agency fee in exchange for bargaining services. If membership in these districts fell off sharply with the retirement of veteran teachers, union budgets there would shrink substantially.

In some districts, what was once a low-key welcome breakfast for new teachers in September had become an elaborate series of social events. Neilsen, president in Needham, MA, said that in the past three years her union's priorities had "changed a lot because of the huge influx in new teachers. . . . Our first priority is membership. Before

negotiations, before grievances, before anything else, our first priority is always membership.” Her union sponsors lunches and breakfasts for all the new staff:

We give them welcome gifts. I give them door prizes here at the high school—we’re talking *big* door prizes. We give huge prizes. If they join the union by November 1st, we forgive all their dues for September and October. And then we have developed communication chains in all the schools, where if they don’t join at the breakfast or luncheon, we have little chains in place where current members go and follow up with them in person during the school day. And that goes on and on and on.

In Pomona, CA, President Sara Ross baked brownies and cookies to let new teachers know that she cared about them and to encourage them to talk with her about the union.

In Sweetwater, CA, Alex Anguiano said his union held Friday night socials to attract new members. Bruce Seaman in Grossmont, CA said his union sponsored a program called “SPARKS” to pique new teachers’ interest in their union, while Broward County’s Santeramo created a New Educator Program, with a full-time staff member who visited schools, recruiting members and organizing social events for novice teachers.

Providing induction and professional development

In Mount Healthy, OH, Brooks tried to educate new teachers about the history of the union and the contents of the contract. However, most other presidents had decided this approach was futile, and they worked instead to identify and address the concerns voiced by the new teachers. Induction programs and professional development received the most attention. When we asked presidents to identify and rank their priorities, “professional development”—an area of little interest to many veterans—emerged as the third most important; only salary and benefits received higher rankings.

Many presidents described local mentoring programs that matched experienced teachers with novices to provide support and advice. Sweetwater, CA’s Anguiano

described his union's approach: "So we really go after these folks. We try to convince them, 'Hey, you know what? We want you to be the best teacher you can be. We support all the methods that will make you a more professional teacher. And at the same time, we need you because there is strength in numbers.'" In Palm Beach County, FL, Theo Harris explained that his union "wants to keep [new teachers]. . . and to develop them into high-quality teachers. . . . We've been working closely with the district and challenging them to work with us [in] developing a mentoring program for our teachers. . . that will help them be successful."

Several presidents said they provided professional development, using curriculum provided by state or national affiliates. The Collier County, FL union offered short courses addressing basic demands their new teachers faced, such as classroom management or lesson planning, as well as more advanced matters, such as research-based strategies to teach elementary reading or math. President Jeffers noted that, using resources developed by the AFT, the union was providing much more for teachers than the district: "We're the professional development organization. We know what's going on around the country, and the actual professional development that I've received from the district has been very poor, in my opinion. But the professional development from [the AFT] has been fantastic. It's a really good program."

Other unions, however, created their own professional development in response to local needs. Most of these were large organizations with considerable resources. However, in Georgetown, OH, one of the smallest unions in our study, President Melissa Cropper also had decided to lead on professional development, explaining, "I very much see the union as being a proactive organization." With broad teacher input and the

superintendent's endorsement, Cropper planned the district's four days of professional development, centering on the use of technology in instruction. Although this president's single-handed initiative was unusual, virtually all of those we interviewed expressed interest in being involved in their members' ongoing development as teachers.

In most cases, presidents said they had to address the needs of new members without compromising their efforts on behalf of the veterans. But resources were limited and there was growing recognition among those interviewed that they could no longer allow veteran teachers' interests to trump those of new teachers. Palm Beach County's Harris observed that experienced teachers might not be "as susceptible to professional development" as the new teachers, "but I have to look at my membership as a whole." Similarly, Irma Valerio in Colorado Springs, CO said, "I think the older guard are sick and tired of professional development. But I think that, for our new and upcoming teachers, that's where we need to develop some relationships and key into the things that they think are important. Otherwise, our membership is not going to last. . . . [T]hese are the things that are key for our survival." Thus, a number of union presidents saw professional development not only as a way to respond to their newer members' needs and expectations, but also as a strategy for support that would keep them in the classroom and the union.

Developing new leaders

In addition to recruiting new members and ensuring that the union served their instructional needs, many presidents said they worked hard so that teachers who joined the organization would become engaged and active participants. When asked to summarize their accomplishments, more than one-third of the presidents noted their

success in expanding membership and participation by new teachers. The presidents sought to increase the proportion of recent recruits attending union meetings, serving as building representatives, and participating on various committees. Boston's Richard Stutman selected newer members for key positions, explaining that he wanted "people in leadership who are representative of every strata of membership." Grossmont, CA's Seaman said that one of his major goals before retirement was to bring "new blood" into positions of union leadership. Similarly, in Amherst-Pelham, MA, Timothy Sheehan said he "had purposely put together a mixed bargaining team that had people who'd done it for years and people who'd never done it before." He explained that he was trying to "build new leadership and build a future and longevity for the organization." Several presidents who made similar changes reported that their decisions sometimes provoked objections from older members who were asked to step aside and make room for newer teachers in leadership positions.

Promoting an Expanded Agenda

Given pressure from within the union—largely from new teachers—to attend to professional matters and from outside the union to contribute to school improvement, most of the presidents felt that pursuing conventional union priorities was necessary, but not sufficient. Although they said it was essential that they secure better salaries, benefits, working conditions, and due process for their members, very few stopped there. "Today [your vision] has to be more than just working conditions, benefits, and salary. You have to be more than that," Marietta English of the Baltimore Teachers Union told us.

Some presidents suggested that an agenda of professional advancement—one with increased responsibility, influence, and status for teachers—would counterbalance the popular view that the union takes care of its own and obstructs change. Georgetown’s president Cropper explained:

Well, I think the perception in the past has been that our purpose is simply for negotiating what you can call the bread-and-butter terms of our contract, meaning our sick leave, our personal leave, our salary. That has been the local perception and the perception at a lot of locals, I believe. But I think the OFT/AFT’s [Ohio Federation of Teachers and the American Federation of Teachers] idea of a union is broader than that. And that has been the message I have been trying to spread at the union here. That is more along the lines of advancing the profession, raising the quality of teachers, therefore raising academics among the students.

In extending beyond the baseline agenda, a number of these presidents took the call to lead on behalf of teacher professionalism, promoting reforms in teacher compensation, assignment, evaluation, and professional development

Many presidents were working with local school systems to pilot modifications to the traditional practice of paying solely teachers on the basis of seniority and academic coursework, including stipends for specialized roles or extra work, career ladders, pay incentives for teachers in hard-to-staff schools or subjects, and rewards for teachers certified by the National Board for Professional Teaching Standards. In addition to promoting new induction and professional development programs, most presidents also supported contract changes in teacher assignment that might improve teacher quality, especially in low-income, underperforming schools. One of the most notable reforms involved reducing or eliminating the role that seniority played in assigning staff. Three unions collaborated with management to sponsor Peer Assistance and Review (PAR) Programs in which expert teachers assisted and evaluated their peers, ultimately

recommending their re-employment or dismissal. In negotiating their contracts, many relied on elements of interest-based bargaining, which fostered collaboration rather than confrontation, and some engaged in continuous bargaining, which allowed them to amend the contract when needed, rather than waiting several years for the opening of formal negotiations. Day-to-day, most tried to resolve problems informally or through standing committees, rather than resorting to the formal grievance process.

Presidents who believed that unions must lead the way on more progressive practices generally found that new teachers accepted, even endorsed, their expanded agenda. However, some of these presidents' members—especially veterans who recalled their union's early struggles to make progress on the traditional agenda—doubted that the reform agenda was warranted or wise. Such initiatives ventured off the traditional path of unionism and, as a result, veteran teachers had to be convinced that there were worthwhile gains to be made. For many, this proved to be a hard sell.

The Challenge of Leading a Divided Union

In several districts, external threats to public education—for example, a school board's move to eliminate academic freedom for teachers in one CA district—unified the new and veteran members of the union. However, absent such threats, local union presidents had not yet found a single agenda that all teachers would unite behind. Most said they found themselves straddling two sets of goals, taking into account the priorities of experienced teachers (e.g., retirement benefits, protection of duty-free time) while also addressing the needs and expectations of new teachers (e.g., quick responses to individuals' questions, professional development, differentiated pay). Meanwhile, many had their own vision of what the local union might become, which included

professionalizing teaching and becoming an equal partner with district administrators in reforming the schools.

Those who reframed or expanded the traditional union agenda and urged teachers to assume greater responsibility for their profession were, for the most part, not following their veteran members' lead. Nor were they certain to win the endorsement of new members, who tended to remain distant from the union's initiatives, even after they had joined and paid their dues. These presidents risked failing, and possibly losing their next election, if they misjudged their members' readiness to embrace non-traditional goals and activities. Yet, without clear and confident leadership from the president, the local union cannot play a meaningful role as the district moves forward. How these local leaders address the challenges of leading a divided union will largely determine teachers' influence on school policy and practice in the years ahead.

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Appendix I: Methods

This study is based on interviews with 30 recently-elected union presidents clustered in six states: California, Colorado, Florida, Massachusetts, Maryland, and Ohio. Most aspects of this study—research design, data collection, and data analysis—took place between January, 2006 and September, 2006.

Sample

In building our sample, we selected states that permit or require collective bargaining but whose collective bargaining statutes differ. For example, teachers have a state-granted right to negotiate a legally binding contract with their school district in all states of our sample except Colorado, which has no collective bargaining law. The scope of issues that must be bargained in Florida is broad, but relatively narrow in California. In Massachusetts and California, unions can bargain to charge all teachers (union and non-union members alike) a fee for negotiating on their behalf, while Florida prohibits such an agreement and Maryland requires each district to receive approval from the state legislature before doing so. Teachers in Colorado, Ohio and California are permitted to strike, while those in Massachusetts and Florida may not. Thus, this array of states allowed us to explore the role of state law in defining the union presidents' work. We also considered geographic diversity, which led us to choose one state each from the Northeast, Mid-Atlantic, Southeast, Midwest, and two from the West.

Within each state, we selected five presidents who had been elected within the past 8 years. We focused on recently-elected presidents because we were interested in knowing whether these individuals were approaching their job in new ways, given the

new context of accountability and the decline of private sector unions. We restricted our sample to a single region within a state (e.g. southern California) with the hope of building a sample of presidents who worked within a relatively consistent labor market context. Within each region, we selected districts that varied in size, urban/suburban/rural character, and wealth. We also sought to include unions that varied in affiliation (AFT/NEA), although all unions are merged in Florida. We wanted to include unions that were committed to traditional practices as well as those involved in reform. Therefore, we consulted with national experts and state union officials, and we analyzed news reports on line. Moreover, we sought to build a sample of individuals who, based on our preliminary research, had a range of views and strategies. We also attended to the demographic character of our total sample and occasionally chose one individual over another in order to achieve greater diversity in race and ethnicity.

Data Collection and Analysis

From May to September, 2006, we conducted interviews of approximately 2 hours each with the presidents in our sample. Of these, 28 were conducted in the president's local setting and 2 were conducted by phone when those individuals were unavailable during our site visits. Interviews followed a semi-structured protocol that explored the presidents' perspectives and practices regarding bargaining and labor relations; their members' concerns and beliefs; their approaches to leadership; and their views about specific topics such as pay, peer review, and teacher assignment. The interview protocol is included in Appendix II.

Interviews were transcribed verbatim and coded using theoretical and open coding. In our first stage of analysis, we created thematic summaries that captured salient

aspects of each president's account soon after the interview. We then coded transcripts using topics that we drew from prior research, identified in the thematic summaries, or heard during the interviews themselves. Simultaneously, we developed matrices to identify patterns in the data and to test emerging hypotheses (Miles & Huberman, 1994). We also wrote analytic memos that examined patterns and relationships in the data (Maxwell, 1996). In all stages of research, we checked our interpretations with other members of the research team.

We studied collective bargaining agreements both before and after conducting site visits and interviews. We then identified a set of key provisions, such as those that affect staffing or pay, and created a spreadsheet allowing us to compare contract language on these topics across all 30 districts. Contract analysis is only partially informative because provisions are not always implemented or enforced and the meanings of words and phrases often vary across settings; only intensive case studies can document how the contract is used in practice. Therefore, we focused primarily on whether and how certain topics were addressed in the contracts, recognizing that we had to be cautious about conclusions drawn from this process.

Because this study is based on a purposive sample, its findings cannot be generalized to all recently-elected teachers union leaders. However, by examining closely these presidents' priorities, attitudes, and accounts of their actions, we seek to illuminate the experiences of a group of people who, to our knowledge, have never been studied before.

Appendix II

STUDY PARTICIPANTS

California

Alex Anguiano	Sweetwater Education Association	Sweetwater Union High School District
A.J. Duffy	United Teachers Los Angeles	Los Angeles Unified School District
Jim Groth	Chula Vista Educators	Chula Vista Elementary School District
Bruce Seaman	Grossmont Education Association	Grossmont Union High School District
Sarah Ross	Associated Pomona Teachers	Pomona Unified School District

Colorado

Mark Chavez	Boulder Valley Education Association	Boulder Valley School District
Tom Lynch	Westminster Education Association	Adams 50 School District
Lori Maag	Greeley Education Association	Greeley-Evans Weld County District 6
Kim Ursetta	Denver Classroom Teachers Association	Denver Public Schools
Irma Valerio	Colorado Springs Education Association	Colorado Springs School District 11

Florida

Karen B. Aronowitz	United Teachers of Dade	Miami-Dade County Public Schools
Janice D. Brown	Glades County Classroom Teachers Association	Glades County School District
Theo Harris	Palm Beach County Classroom Teachers Association	Palm Beach County School District
Von D. Jeffers	Collier County Education Association	Collier County Public Schools
Patrick A. Santeramo	Broward Teachers Union	Broward County Public Schools

Maryland

Gary Brennan	Frederick County Teachers Association	Frederick County Public Schools
Bonnie Cullison	Montgomery County Education Association	Montgomery County Public Schools
Ann DeLacy	Howard County Education Association	Howard County Public Schools
Marietta English	The Baltimore Teachers Union	Baltimore City Public School System
Carol Kilby	Prince George's County Educators' Association	Prince George's County Public Schools

Massachusetts

Cheryl A. DelSignore	Educational Association of Worcester	Worcester Public Schools
Sherrill Neilsen	Needham Education Association	Needham Public Schools
Timothy Sheehan	Amherst-Pelham Education Association	Amherst-Pelham Public Schools
Richard Stutman	Boston Teachers Union	Boston Public Schools
Paul Toner	Cambridge Teachers Association	Cambridge Public Schools

Ohio

Susan Brooks	Mount Healthy Teachers' Association	Mount Healthy City School District
Melissa Cropper	Georgetown Federation of Teachers	Georgetown Exempted Village School District
Rhonda Johnson	Columbus Education Association	Columbus Public Schools
Sue Taylor	Cincinnati Federation of Teachers	Cincinnati Public Schools
Willie A. Terrell, Jr.	Dayton Education Association	Dayton City School District

We greatly appreciate these union presidents' participation in this study. They were generous with their time and thoughts.