

*Technical Report*

# TEACHER POWER AND THE POLITICS OF UNION ORGANIZING IN THE CHARTER SECTOR

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## **Teacher Power and the Politics of Union Organizing in the Charter Sector**

### **Abstract**

Despite the growing media attention paid to charter-school unions, comparatively little empirical research exists. Drawing on interview data from two cities (Detroit, MI and New Orleans, LA), our exploratory study examined charter-school teachers' motivations for organizing, the political and power dimensions, and the framing of unions by both teachers and administrations. We found that improving teacher retention, and thus school stability, was a central motivation for teacher organizers, while, simultaneously, high teacher turnover stymied union drives. Charter teachers were careful to frame union power in terms of improving student outcomes and protecting vulnerable students. We also found that charter administrators reacted with severity to nascent unionization drives, harnessing school-as-family metaphors and at-will contracts to prevent union formation. Our findings expand upon literature in organizational sociology regarding union organizing and management responses to organizational change, and we identify how the different political and policy contexts in Detroit and New Orleans influence the nature of union organizing. As the charter sector continues to grow, understanding why teachers want unions and how those unions differ from traditional public school unions is crucial to analyzing the long-term viability of these schools and the career trajectories of the teachers who work in them.

As policymakers and education reformers in the U.S. focus their attention on issues of teacher quality and evaluation, the long-held view that teachers' unions, by defending the status quo, inhibit reforms that could benefit students has become central to these debates (Moe, 2011). While several U.S. states have outlawed collective bargaining for public employees outright, governors in states that permit collective bargaining for teachers have recently sought to narrow the scope of such rights to exclude issues related to working conditions, hours, and layoff procedures (Sanes & Schmitt, 2014). In this context, last year teachers across the U.S., particularly in conservative, right-to-work states, entered politics, engaged in walkouts and protests, and fought for increased school funding and a living wage (Galchen, 2018). These events bring to the fore central issues around teachers' working conditions and the role of unions in educational improvement.

These issues are particularly fraught in the charter school sector, where teachers are generally less experienced, not unionized, exhibit higher rates of turnover, have less job security, and receive lower pay (Barrett & Harris, 2015; Burian-Fitzgerald, Luekens, & Strizek, 2004; Cannata & Penaloza, 2012; Malin & Kerchner, 2006; Podgursky & Ballou, 2001; Stuit & Smith, 2012; Torres, 2014a, 2014b). Though union leader Al Shanker initially advocated for charter schools that would retain union contracts and allow teachers to run schools (Peterson, 2010), charter advocates now argue that the freedom from restrictive collective bargaining agreements is one of the central benefits of charter schools (Vergari, 2007). By privatizing school governance, charter leaders are able to make educational decisions freed from the limitations, slow-downs, and public interest group politics inherent to public decision-making processes (Moe, 2000). Teachers' unions have traditionally worked to block charter school legislation, but

in recent years, efforts to minimize the threat posed by charter schools to their membership has spurred proactive teacher organizing efforts (Young, 2011). About 11% of charter schools have collective bargaining agreements; approximately half of these were required by state law (National Alliance for Public Charter Schools, 2017).

Despite the growing media attention paid to charter school unions (e.g., Loewus, 2017), comparatively little empirical research exists. Some researchers have examined the impact of charter school unions on student outcomes (Matsudaira & Patterson, 2017), and the legal context surrounding charter schools and collective bargaining (Kaufman, 2013; Green, Baker, & Oluwole, 2015; Superfine & Woo, 2018). There are a handful of qualitative case studies examining unionization efforts in particular schools, such as the motivations for union organizing in a charter school in New Orleans (Beabout & Gill, 2015), and the process of organizing in one charter school in Los Angeles (Montaño, 2015). Our work extends prior case studies to examine how, across multiple schools, teachers frame their organizing efforts, organizational responses from administrators, and the political and power dimensions of organizing.

In this paper, we analyzed data from 21 interviews with teachers from 12 different schools in New Orleans and Detroit, two cities with active charter-school union movements (see Table 1 for a breakdown of teacher and school characteristics). In these sites, we focus primarily on the perceptions of pro-union teachers active in the organizing process. We found that improving teacher retention, and thus creating more stable schools, was a key motivation for teacher organizers, while, simultaneously, high teacher turnover stymied nascent union drives. Our work contributes to the literature on charter school unions by highlighting the intersection

between turnover and organizing efforts. Furthermore, we identified several key ways that charter teachers framed their organizing efforts to counter mainstream views of teachers' unions as focused only on "bread and butter" issues, such as wages and benefits. Charter teachers were careful to frame their goals in terms of improving student outcomes and protecting vulnerable students; they emphasized their desire to improve their schools and ensure the longevity of the institution through union formation. Despite these purported goals, teachers reported that charter administrations reacted with severity to union drives, harnessing school-as-family metaphors and at-will employment to undermine union formation.

### **Background**

Teachers in the U.S. are highly unionized, compared to other workers (Malin & Kerchner, 2006). In recent years, reforms have sought to weaken the strength of teachers' unions, through changes to tenure policies and dues collection (Cowen & Strunk, 2015). The arguments for these reforms are rooted primarily in assumptions from labor economics; the traditional theoretical argument has been that unions' monopoly power artificially drives up wages (Oswald, 1985). Salary schedules, job security, and "last in, first out" hiring and layoff procedures limit the power of incentives within organizations and prevent employers from firing less productive senior workers (Oswald, 1985). Sociological theories have suggested potential benefits of unionization, such as increased job satisfaction, autonomy, and dignity, yet it is unclear whether such outcomes are linked with greater productivity (Steelman, Powell, & Carini, 2000).

In education, researchers have examined teachers' unions impacts on expenditures and productivity as well as student outcomes. Studies have found that districts with unions had

higher school expenditures on teacher salaries, by about 7 to 15 percent (Eberts & Stone, 1987; Lovenheim, 2009), and that collective bargaining impacted the design and structure of teacher pay, emphasizing pay based on a teacher's formal education and experience, or "inputs," rather than merit pay based on student test scores, or "outputs" (West & Mykerezi, 2011). Research examining the effects of teachers' unions on student achievement has yielded mixed findings (Hoxby, 1996; Lindy, 2010; Lovenheim, 2009), with some research finding that more restrictive contracts are associated with lower student outcomes (Moe, 2009; Strunk, 2011; for a review, see Cowen & Strunk, 2015).

Teachers' unions have, historically, played a crucial role in protecting the rights of marginalized workers, including women (Goldstein, 2014; Murphy, 1990) and people of color (Urban, 2000; Todd-Breland, 2018). They have organized around issues of pay/salary, working conditions, work hours, and grievance policies (Cowen & Strunk, 2014). Teachers' unions have also, however, been used by the white middle class to maintain their power and control over urban schools. For example, unions have continued to support teacher entrance exams, on which whites typically score higher, and enforce seniority policies that prohibit race-based retention intended to create a more diverse teaching force (e.g. Kahlenberg, 2007, Podair, 2002; Perrillo, 2012). Teachers' unions have sought to "professionalize" teaching and elevate the profession (Cowen & Strunk, 2014), yet at the same time critics have argued that unions are intended for blue-collar workers and therefore inherently unprofessional.

Although research has examined the working conditions, salaries, and turnover of charter-school teachers (Berends, 2015; Cannata & Penaloza, 2012; Torres, 2014), few studies have examined charter school organizing. Studies comparing charter and traditional public

school teachers have found that working conditions are relatively worse in charter schools, which tend to have lower salaries (Harris & Plank, 2003) and higher rates of turnover (Stuit & Smith, 2011; Torres, 2014a, 2014b). Furthermore, charter schools typically lack union representation (Vergari, 2007), require longer work days, and hire less experienced and uncertified teachers (Burian-Fitzgerald et al., 2004; Cannata & Penaloza, 2012; Podgursky & Ballou, 2001). One quantitative study tried to assess the impact of charter-school teacher unionization on student achievement. In California, Matsudaira and Patterson (2017) found a positive and statistically significant impact of charter-school unionization on math achievement, but no impact on achievement in English Language Arts. Examining a handful of contracts in New York City, Kauffman (2013) found that charter union contracts give teachers some protection, but less than in a typical public-school union contract.

There have also been some single-case studies of unionization processes in charter schools. In New Orleans, Beabout and Gill (2015) examined the motivations reported by teachers for unionizing their charter school. Drawing on seven interviews with teachers and an administrator, they found that common issues were pay inequity, a lack of teacher input into school decision making, a lack of transparency in retention, and a climate of fear of speaking out. This study shed light on the concerns reported by teachers, but was limited to teachers from a single school. Similarly, Montaña (2015) examined union formation in a charter school in Los Angeles. The 17 teachers she interviewed were motivated by the “culture of exhaustion” at their school, and, while they valued choice and autonomy, they did not believe it always extended to teachers. Teachers chose to unionize independently, not through the local district’s union, because they did not want a “standard contract,” but one tailored to their needs as a charter

school. However, negotiations were slow and contentious, and “teacher unionization is viewed as a disloyal act” (p. 101). Our work builds on these case studies by looking at themes that emerged across 12 schools in two cities, allowing us to understand teacher motivations and administrative response more generally and identify themes that held across multiple school sites.

### **Methods**

To conceptualize the emergence of charter school unions, our exploratory case study (Yin, 2003) examines why pro-union teachers are organizing, and the reactions they experience from administrators<sup>1</sup> in the process. This line of research emerged from a larger case study of teachers’ job searches. A case study approach was appropriate because this line of inquiry emerged in the field, there were more variables than data points (Yin, 2003), and because there was limited conceptualization of how charter teachers organize unions (Creswell, 2003). We drew on 21 core interviews with teachers from New Orleans and Detroit, two sites where charter school teachers are actively organizing.

### **Site Description**

**New Orleans, Louisiana.** New Orleans is a medium-sized city of 376,738 people, of whom 59% are African American, 31% White, 6% Latino, and 3% Asian (U.S. Census, 2015). As of the 2017-2018 school year, there were 86 public schools in New Orleans, 82 of which (95%) were non-profit charter schools (Cowen Institute, 2018). These schools served 48,545 students (Cowen Institute, 2018), 80% of whom were African American, while 9% were White, 7.6% Latino, and 3.4% of another race. However, white students and middle-income students were overrepresented at higher performing schools, especially those with selective admissions

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<sup>1</sup> In this paper, we use the word “administrators” to mean school-level directors--for example, principals, CEOs, deans, etc. If we are discussing CMO-level operators, we say that explicitly.

(Cowen Institute, 2018). Charter schools in Louisiana are exempt from collective bargaining agreements (NAPCS, 2017); 4 of the 82 schools had unions, all of which were independent of larger charter-management networks. Though salary varies significantly by charter, the mean salary for a first-year teacher with a Bachelor's Degree was higher--\$45,212--at the charters included in our study than that of a first-year teacher at a traditional public school of \$42,256 (Louisiana Department of Education, 2019).

INSERT TABLE 1 HERE

**Detroit, Michigan:** Detroit is a Midwestern city with a population of about 690,000 (U.S. Census, 2015). In 2015, the city was 80% African American, 9% White, 8% Latino, and 1% Asian. As of the 2017-2018 school year, the central school district, Detroit Public Schools, had a population of 47,277 students (83% African American, 13% Latino, 2% White, and 1% Asian) across 111 schools (Detroit Public Schools, 2019). Another 50,000 or so students attended approximately 70 charter schools (Coleman, 2019), which had a market share of 53% (NAPCS, 2015). Charter schools in Detroit are also exempt from district collective bargaining agreements. In the state, only 9 out of the 294 charter schools are unionized, and 2 of these schools are in Detroit (Chen, 2018). The starting salary for teachers in Detroit Public Schools is \$38,500 (Michigan Association of School Boards, 2019), while salary data is not available for charter schools in Detroit.

### **Data Collection**

For this study, we interviewed 21 teachers who currently or formerly worked at schools that attempted to unionize (n=13 in New Orleans, n=8 in Detroit).<sup>2</sup>

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<sup>2</sup> In addition, we conducted informal interviews with union organizers, scholars, and reporters who wrote about the issue in each site and at the national level (n=5) for additional context.

## INSERT TABLE 2 HERE

Teachers were selected via contacting teachers organizations in each city, through teachers' unions, and by snowball sampling, or asking respondents to recommend others we could speak to (Miles, Huberman, & Saldaña, 2014). To understand their motivations for forming a union and the organizing process, we asked a variety of questions using a semi-structured interview protocol, which combined informal, open-ended, and more formulated questions (Patton, 1990). We conducted interviews in person and by phone between 2016 and 2018. Interviews were semi-structured, lasting 60 minutes each, and were recorded and transcribed.

### **Data Analysis**

To analyze data, we developed a codebook that included codes for various stages of the process, drawing from prior literature to create deductive codes. Broad codes included “motivations,” (with subcodes for teacher voice/autonomy, workload, fairness, job security, pay, and “other”); “organizing process,” “reactions” (with subcodes for different stakeholders, i.e., board, parents, administrators, students); “bargaining process,” “perception of unions,” “student supports,” and “post-union,” for what occurred after a union was in place. Then, during coding, several inductive codes emerged, related to “fear” and “turnover,” for example. We coded the data in the qualitative software program Dedoose. Using the “training” module in Dedoose, the lead researcher served as the “master coder,” and two additional coders completed the training. We coded two transcripts, meeting after each to discuss discrepancies in codes. Once “good” inter-rater reliability was achieved (Cohen’s kappa value greater than 0.75), we proceeded with coding independently. We created memos for each code, synthesizing across the excerpts in the

category. We used the memos to explore within- and cross-case patterns and to address the study's central questions about teacher organizing in charter schools.

### **Limitations**

Our work focuses on teachers' experiences with union organizing. We recognize that this perspective leaves out the views of school administrators. Furthermore, our sample is heavily weighted towards teachers who supported the union drives because we were more successful in recruiting supporters of the union in each site. Only one teacher was opposed to the union. Therefore, our discussion around drawbacks to joining the union is from the perspective of union supporters, including what they heard from their colleagues.

### **Motivations for Union Organizing**

Though teachers at different schools articulated a variety of motivations for starting a union, several themes emerged across both cities. These include both the typical "bread and butter" issues of labor unions, such as increased pay, a transparent salary schedule, and due process for firings, as well as more abstract motivations such as the desire for greater autonomy and voice, concerns around school policy and student well-being, and the belief that labor unions could affect larger systemic change. Detroit teachers described their schools as underfunded and lacking basic supplies: curricula, materials, textbooks, etc., while New Orleans teachers saw their schools as logistically functional and therefore focused their demands on more abstract improvements, such as incorporating more teacher voice or influencing school policies. Similarly, teachers in Detroit generally received significantly lower salaries, and thus pay was more of an issue in Detroit--though transparency and fairness around pay came up in New Orleans as well.

## **Pay and Transparency**

Issues around pay—low salaries, discrepancies in pay, and teachers not fully compensated for their time—were much more prevalent in Detroit than in New Orleans. In fact, New Orleans teachers often distanced their campaigns from issues related to salary, for fear of being associated with negative stereotypes of unions. For example, one teacher emphasized: “Money was never an issue. We never talked about money... We never brought salaries up.” In Detroit, where for-profit charter management organizations were prevalent, pay was more of a concern. However, teachers there also worried that bargaining over salaries would be perceived as self-interested. One teacher noted unsettledness with the widespread idea that teachers should not be concerned about “the money”:

There’s just this constant notion that teachers are martyrs, and we’re here to do anything it takes for the kids, and so a lot of people have this notion that, I’m not here for the money... I’m here to help children learn.

Despite these concerns around framing, much of the organizing in Detroit focused on getting teachers a fair contract in terms of salary and benefits. 6 of the 8 teachers from Detroit brought up pay as a central organizing priority. Concerns around pay, benefits, and additional compensation are the central tenants of most teachers’ union contracts; thus, these motivations fit easily into a traditional union context.

Others were concerned about the lack of transparency in pay or a clear salary schedule (seven of the eight teachers in Detroit expressed this concern). Some teachers were forbidden to discuss their salaries with their colleagues. Teachers who negotiated their individual terms upon hiring subsequently were paid more than teachers who did not negotiate, leading to discrepancies

in pay based on teachers' willingness to negotiate rather than their effectiveness or experience. Teachers who had personal relationships with board members or administrators advocated for individual pay raises:

We are just kind of in this no man's land of negotiation, where you can go in and negotiate your own salary... So, you have teachers...who are willing to negotiate, who are getting more salary than teachers who have been around longer.

This can lead to gender disparities, as women are less likely to negotiate than men (Leibbrandt & List, 2014). The lack of transparency in salary made it difficult for teachers to budget and plan for the future: "There were issues of not having any clarity about what the pay would look like in the future, whether you could expect any type of increases in pay. What the benefits would look like for themselves or for their families from year to year."

In addition, four teachers indicated that there was a sense of discrimination in pay along lines of race and gender, with white men receiving higher salaries. One teacher reported that once the union gained their contract, they were able to access data on teacher pay and "the discrepancies were readily apparent." Another noted: "We discovered that they also have a policy at the school of paying men just across the board more than women." Teachers felt that a union contract with a clear and transparent salary schedule would end pay disparities and help teachers plan for the future.

### **Retention and Job Security**

In both New Orleans and Detroit, job security was a key motivation for union organizing. Eight teachers discussed teacher dismissals as a significant concern, often framed in terms of the effect that teacher turnover had on students. Teachers described having coworkers

fired because of personal disagreements with administrators, unverified parent complaints, or for demonstrating leadership that administrators perceived as threatening. Several teachers indicated that teachers were fired for no apparent reason, sometimes in the middle of the school year: “They would just fire people willy-nilly. We wouldn't know why.” This created a culture of fear, as one teacher described: “People are afraid. People want their jobs. Charter schools can just fire anybody for any reason. It doesn't matter, and there is no grievance process.” Teachers called their employment agreements “meaningless,” as they were at-will employees. Occasionally, teachers framed their concerns around job security as a desire for “tenure,” though they worried that term would elicit stereotypes about unions protecting “bad teachers” at the expense of students. One New Orleans teacher said: “[It's] like tenure is a bad word. But [we wanted] job security. Due process.” Teachers insisted that they deserved “some semblance of security; not a guarantee.” A New Orleans teacher elaborated: “No one is asking for guaranteed employment for life, and no one discussed anything about bad teachers staying on or not being able to fire a teacher.”

Some teachers saw unions as a way to create stability in an environment in which charter management organizations (CMOs) and administrator turnover was high: “A lot of teachers feel like building power with a national organization is one way to try and stabilize things.” This was especially true when schools themselves were opening and closing every year; teachers expressed hope that a union would add a layer of consistency for children and parents: “Particularly in a poorer area, you need an institution that's gonna be stable, and without teachers' unions, with the turnover and the morale destruction... This charter thing won't work.” Notably, rather than arguing against charter schools, these teachers believed charter-school

unions would keep the sector robust by increasing school stability and teacher retention. The teachers wanted their schools to be charters, but they also wanted the job security and improved working conditions they associated with unions to ensure their school's success.

## **Workload**

A contributing factor to high teacher turnover, and a motivation for union organizing, was a workload that teachers characterized as excessive. Fifteen of the twenty-one teachers we interviewed cited this factor as a core concern, describing long and “unsustainable” hours, leading to “burnout” and high turnover rates, especially for older teachers and teachers with families. Several teachers estimated they worked more than 55 or 60 hours per week; one New Orleans teacher “literally worked six and a half days a week.” Teachers reported feeling afraid to turn down extra tasks, worried they would get on their principal's bad side. Again, teachers were careful to frame their concerns around workload in terms of best practices for student learning: “Every effort around the union was for the kids. We were really student-centered.”

Further, teachers reported that their planning time was often taken up with meetings or they were forced to sub during prep periods and required to monitor students during their own lunch periods: “There was literally no time to breathe or even go to the bathroom or make photocopies. The day was incredibly long.” Duty-free lunch and unstructured planning periods, or preps, are both hallmarks of traditional union contracts. Five teachers, across both cities, discussed large class sizes as contributing to excessive teacher workload while also compromising student learning. One New Orleans teacher noted that the current class size limit of 33 students was “absolutely ridiculous,” and “something a lot of us were pushing back

against.” Ultimately, teachers felt like the excessive workload undermined their ability to work as professionals and plan a sustainable career.

### **Professionalism and Leadership**

Teachers’ desires for greater professionalism and leadership were major motivations for union organizing. For eight teachers, professionalism included greater autonomy in determining curriculum and classroom activities. They wanted the freedom to differentiate for diverse groups of students, especially English Learners and students with special needs, and to teach in ways that aligned with their values, such as emphasizing project-based instruction over test preparation. Teachers sought control over “the craft of teaching,” including training, evaluation, and professional development.

Teachers often felt dismissed by administrators—“shooed away”—when they brought up concerns individually. This led teachers to believe that a collective voice, through a union, would ensure that they would be heard. Teachers reported that administrators repeatedly asked for their input and then ignored it. They felt that a union might equalize the playing field for teachers across the school and dismantle a system in which privileges within the school were based on favoritism rather than professional expertise. Not all teachers were included or had the same access to administrators. One teacher said, “The open door policy was not true. I tried to get in to see our CEO multiple times, and [their] door was always closed.” Another teacher learned that the staff called him the “golden boy” because of his privileged status with administrators. He “had no idea that relationship was contentious with other staff who weren't enjoying the same privileges.”

The one teacher we interviewed who opposed unionization argued that concerns over teacher voice were exaggerated. He felt his personal relationship with the principal gave him the influence he needed and that he had significant independence over what he taught: “My point was always, you have a voice. You're just not using it.” Though mobilizing his personal connections with administrators worked for this teacher, it is exactly this type of access that many union organizers were trying to avoid through the creation of a collective voice and systematized processes for faculty communication.

Teachers also hoped to participate more in schoolwide decision-making because they felt “committed to the goals of the school.” Six teachers indicated that they wanted more influence over school policies, especially policies that they found unjust. One teacher gave an example: “We don't allow boys to wear earrings. I think that's culturally inappropriate... But I have no say in that and parents have no say in that. And my efforts to combat, to disagree with that policy have not gone anywhere.” Another teacher discussed the importance of “diluting” authority so that more people would have a voice and a role in final decisions. Teachers were frustrated “with the lack of teacher voice in any of the policies,” and they believed that a school union would allow them to push the district to make more just and student-centered decisions: “We just were convinced that a lot of decisions may not be made in the best interest of kids or educators.”

### **Student Supports**

Teachers tried to connect each issue to the need to support students. One New Orleans teacher noted: “We just felt like there wasn't a way we could advocate for our kids.” Several teachers described their schools as having inadequate discipline structures and lacking resources for students suffering from trauma. Teachers wanted more social workers, given the lack of

support for “trauma,” “learning disabilities,” and “serious discipline issues.” Other teachers were upset that administrators didn’t back up their disciplinary decisions. This undermined their classroom authority and reflected the absence of a clear school-wide behavior-management policy.

Four teachers additionally worried that English Learners and students with disabilities weren’t being treated fairly. Teachers were “not convinced that we were following the letter of the law,” but felt powerless to change the policies in place at their schools. They hoped that the union would allow them to better advocate for these students and ensure their needs were met: “Roughly 75% of the students that are in [my school] are identified as LEP or FLEP... but many of the students that were identified as English Language Learners were not receiving ESL services in school.” These services were often not being provided because of perceived staffing shortages; teachers wanted their schools to fully fund the positions needed to provide for each student’s actual needs. Not only were some of these decisions against the law, they also undermined student success: “Kids’ needs were not being met. Minutes were just disappearing from their IEPs. I mean it was just highly illegal.” Teachers thus repeatedly emphasized that their desire to start a union was out of concern for the students they taught and for the school as an institution, rather than about their own individual gain. Though this framing serves to contradict prominent anti-union narratives, it also reflects real concerns teachers have about their ability to meet student needs.

### **Drawbacks of Unionizing**

Though the vast majority of teachers we interviewed supported unionization efforts, they also spoke about potential drawbacks to unionizing. Because we only interviewed one teacher

who opposed the unionization efforts within his school, many of the teachers we spoke with articulated these drawbacks as motivations for others, not themselves. Some teachers did not want to join the union because of pre-existing anti-union politics. Sometimes, these teachers had had negative experiences with unions in the past or they saw unions as “detached” or not interested in charter schools. These teachers voiced concerns that unions would “fight for bad teachers.”

Others worried that it would divide the staff and create tension within the school: “In fact, my fears were, and they were found to be true, was that it was actually just gonna tear the staff apart. Which is exactly what it did.” Some teachers attributed union opposition to fear of conflict and “the power struggle” inherent in organizing. As one Detroit teacher said: “We’re going up to our bosses and demanding power. And I think that that’s really hard.” Teachers also did not want to “jeopardize their relationship with the principal”—especially if that relationship was working for them personally. By contrast, those who did not have a prior positive relationship with administrators worried that union organizing could put their job at risk.

Since 20 of the 21 teachers we interviewed participated in the organizing drive despite these potential drawbacks, it is clear that for many organizers their motivations outweighed their fears. Though teachers discussed various motivations for organizing--increased voice, transparency, and fairness among them--across both sites, by far the most prevalent motivation was decreasing teacher turnover and improving job security. Having a stable faculty was viewed as the foundation for many of the other improvements teachers wanted. For example, teachers believed they would have more voice and agency when they knew the school well and felt confident that they wouldn’t be fired suddenly; similarly, longevity in a school could, they

argued, lead to increased leadership roles and more confidence advocating for students. Along with teacher retention, in Detroit, teachers were highly motivated to increase their salaries and improve the resources and materials available to them in the classroom.

### **Administrators' Responses to Organizing**

In this section, we describe teachers' perceptions of the institutional responses and strategies used by administration, including resistance to change through fear and threats, constituting shared understandings, direct retaliation, use of narratives, and cooptation (Hargadon & Douglas, 2001), and how their responses influenced teachers' strategies. Because we did not interview any administrators, these responses are reported by teacher organizers. However, the responses were relatively consistent across various schools in both cities.

### **Narrow Governance Structures and Fear**

Charter school administrators and board members are responsible for interpreting state education code and dispersing resources toward compliance and institutional goals. The latitude administrators enjoy also provided cover for retaliation against union organizers. In New Orleans, nine teachers referenced fear based on their experience in organizing, and in Detroit, five teachers expressed similar concerns. Fear served to disrupt unionizing through teacher withdrawal and vote switching. A teacher in New Orleans asked an organizer to, "take my name off the petition," after teacher firings in the middle of the year. She describes the chilling effect these events had on organizing: "You don't want to be the next person to be gone... The feeling of the walls have ears is very very genuinely true, a hundred percent."

In this teacher's school, by the time the vote occurred, many teachers who signed the petition and pledged votes did not cast their ballots accordingly, "and those are people that got

flipped ...because of the threats.” Another teacher from New Orleans remembered, “They [administration] ended up scaring people into voting different ways.” A teacher in Detroit recalled, “There was general union-busting tactics, like intimidating us...The principal evaluated me, ‘cause I was the leader at my school, on the day of the election.”

Teachers across both cities suggested that teachers working on union campaigns were specifically targeted and fired. This perception among staff hampered organizing efforts, as teachers were afraid to participate because of concerns they would lose their jobs. One Detroit teacher reported that both he and a colleague were fired two weeks after speaking at a board meeting about unionization efforts. At another school, a vocal organizer was dismissed following the vote to unionize which, “seemed very suspicious to us.” Organizers were “suspended,” and administrators were seen to have “a personal vendetta” against them. Without due process protections in place, “no one has any job security. We can be fired a ton in a row. For no reason.” The fear of job loss, both real and hypothetical, stymies organizing efforts, particularly in a context where leadership has the power of at-will employment. Interestingly, a teacher opposed to unionization maintained a similar perception of how administration responded:

I was also fearful of the clap back that would come from the administration, which I knew was inevitable. They were coming down harder on teachers. People were being written up. Particularly people that were a part of the union. They [administration] can say, ‘No. No. No. It was the same for everybody.’ But, it really wasn't.

This sentiment is especially telling because the participant aligned themselves with the administration and therefore did not have an incentive to exaggerate the administrative response.

### **Shaping Collective Understandings**

Administrators established narratives about the destructive nature of unionizing in both sites, and used surveillance and “constant reiterations that we have no power and were not valued and our students are not valued” to reinforce power differentials between teachers and administrators. A Detroit teacher explained: “They try to keep their teachers silent through, I don't know if threats is the right word, but you know, basically posturing towards a stance that makes them feel like there would be repercussions if they were to speak out about certain things that happen in the building.”

Teachers also said that administrators acted as surveilors to identify teachers participating in organizing. In addition to breaking up meetings on one campus in Detroit, “administrators would watch to see who was entering or leaving those rooms.” In one case, union supporters arrived to school to find that, “all of a sudden, our key cards didn't work on the day we were gonna vote, so everyone had to go through the front door; there was the principal and the assistant principal being like, ‘Good morning! Let me walk you down the hall.’” Teachers also described increased surveillance in New Orleans. At a school event, where union supporters wore their “union buttons,” a teacher said that “the administrators were walking around with clipboards, clearly writing down names.”

In New Orleans, and to a lesser extent in Detroit, teachers described extreme rhetoric that framed unions in a negative light. School leaders in both settings maintained a similar trope: that the school is a family, with a unique culture which will cease to exist if efforts to unionize are successful. Teachers noted that administrators used metaphors about the school being like a “family,” which they argued obfuscated the fact that “power is wielded inside schools. And the principal is your boss.” In both Detroit and New Orleans, teachers reported that their

administrations evoked a metanarrative of “family,” in some cases “to a nauseating degree.” Administrators could thus constitute the understanding that organizers are agitators and that “the family would be destroyed if we were a union school.” Administrators, teachers noted, emphasized the value of “getting along,” asking, “Why would you start a fight within the family?” Another teacher recalled, “people, especially the opposition people, got extremely emotional, and that was the instance in which we got called Nazis.” One interviewee referenced Jimmy Hoffa, and another teacher shared, “The CEO cried in a staff meeting about it. All the things that now I know are part of union busting, all those little things.”

### **Cooptation**

Another way institutions resist change is through cooptation (Hargadon & Douglas, 2001). In both settings, teachers described ways administrators responded structurally or rhetorically to teacher concerns and their efforts to organize. In some cases, leadership provided rewards to appease individuals tempted to join unionizing efforts. The New Orleans teacher who did not support the union described how his relationship with leadership changed when he became public about his views: “When I became a vocal non-supporter, suddenly [the principal] and I were besties. You know what I mean?” Others described how leaders tried to accommodate individual teachers’ needs to encourage them to not support the organizing efforts. One teacher said that a leader “called me into his office and said, ‘I understand you're having a bad year.’” He continued: “They subdued me. They bought me a printer for my room.” Similarly, a teacher in Detroit speculated that there were teachers who “were promised an admin position if they vote no.” These cooptation efforts were less prevalent, but were one possible strategy, among many, that teachers described schools adopting in response to organizing efforts.

## **Turnover and Instability in Union Organizing Efforts**

In addition to driving teacher organizing efforts, turnover and instability in the charter sector was also an important factor influencing the organizing process and seemed to be the single most-cited obstacle to organizing. Teachers being “fired a ton in a row for any reason,” disrupted the organizing process: “You lose everyone, and you start over.” Many of the schools in which organizing occurred experienced high turnover, and teachers planning to leave were less likely to engage in a union fight: “I’m trying to get a new job, anyways, so I don’t want to make the decision for other people.” Constant turnover undermined teachers’ organizing efforts. As one AFT organizer noted, it was like “organizing in quicksand.”

Some teachers believed that turnover in the charter sector was by design, in part to make it impossible for teachers to organize. In Detroit, a teacher noted that the CMO was “so draconian, and I think most charter schools probably work kind of this way to intentionally curb any efforts to do organizing.” She described how, due to overwork, “it was really hard to even find time when I could talk to other teachers... and there was constant turnover.” Another Detroit teacher asserted that the principal stalled their conversations around salary transparency, perhaps anticipating turnover: “If I were [the principal], with a few weeks left of the school year, I would ... just stall. And then next year a bunch of staff will be gone.” Even when unions ultimately won those battles, their power was undermined due to high turnover, with few of the teachers involved remaining in subsequent years.

## **Larger Political Context and Organizing Efforts**

The larger political and social context in Detroit and New Orleans influenced teachers’ ability to organize and their perceptions of unions. Preconceived notions of local unions in both

sites shaped the rules of the game, legitimacy, and the institutional landscape (Shipps, 2003). Michigan, home of the powerful United Auto Workers, offered a relatively pro-union context; Louisiana, by contrast, has little history of industrial unionism, and today ranks near the bottom of all 50 states in terms of the percentage of the workforce that is unionized (Bureau of Labor Statistics, 2019). However, both states have right-to-work laws—Louisiana since 1976 and Michigan since 2012.

Detroit teachers saw the social context as more pro-union and attributed parent and community support to its history: “I think the parents that we have in Detroit are generally very pro-union. Detroit is a union town.” Moreover, teachers organized with the Detroit Federation of Teachers, who maintained control of many traditional public schools, giving them a stronger base. By contrast, the entire United Teachers of New Orleans (UTNO) workforce was fired in early 2006, after Hurricane Katrina, resulting in UTNO struggling to find funding and dues-paying members. Though some teachers in New Orleans applauded UTNO’s history, others maligned the union for the perceived educational failures of the school system pre-Katrina and for not doing enough to protect teachers from their mass dismissal. As one teacher explained: “[We were told that] UTNO teachers were lazy and all the negative stuff. And I think that it's made the union be like this dirty word.” This framing was also racialized, as UTNO was majority-black. Because of this, teachers in New Orleans were more likely to discuss the union as tailored to their school and not “ beholden” to a national or city-wide model, whereas Detroit teachers were less conflicted about taking part in city-wide unionization efforts.

In Detroit, in part because so many of the CMOs in the city were for-profit, there was a greater feeling of teacher exploitation. Pay was lower in the charters than in traditional public

schools, and teachers often lacked the curricula and materials they needed to be effective. By contrast, CMOs in New Orleans are all non-profit and teachers are relatively well-paid, thus salary rarely emerged as a bargaining issue.

Local union chapters in both sites had begun providing resources for charter-school teachers to organize. Although these unions were previously and still are, in some cases, ideologically opposed to charter schools, they began to view teachers in those schools as allies. One teacher in Detroit noted, “I feel like that’s kind of why AFT has started unionizing charter schools is that admitting it out loud that [charter schools] are here to stay so at least let’s make sure the kids can learn and the teachers are protected somehow.” In New Orleans, similarly, a teacher noted: “Well, considering we’re almost entirely charter and will be entirely charter within the next year or two.” A few teachers described how charter school unions were being framed as a “new” kind of union. One teacher described this as an explicit strategy: “What AFT and UTNO have kind of brilliantly done is make these charter school unions specific to those teachers’ needs at that school. So they’re a little sub-affiliate, however you want to think of it, and so the contracts at the different schools look very different.” One teacher explained that they were “trying to build a new type of union.” Another union organizer noted: “The charter system allows for us to bargain for our specific school. So, we were very proud of the agreement we came out with because it was about [our school], because it was student specific.” This framing could be viewed as a strategy to generate support for unions in the charter sector or a reality of the decentralized and ultimately weaker nature of charter school unions.

Despite union organizers’ attempts to frame charter school unions as individual school-site focused unions—in order to counter the idea of a big, homogenous union

contract—there was still a great deal of resistance to their sovereignty. Union organizers in charter schools were framed as “outsiders” and subjects of a larger, national union. The teacher who opposed union organizing efforts asked “Why do we have to become beholden to this national organization?” even though their contract recognized a single charter school. In Detroit, too, administrators framed union organizers as “outsiders.” There were conflicting portrayals of charter school unions—one side portrayed them as big, national unions pushed by “outsiders,” while the other highlighted the flexibility and autonomy of the individual charter school contracts.

Although it was an effective framing strategy, it is unclear what power teachers exert if each school has its own standalone contract. However, the potential for the flexible tailoring of policy to each school’s context is, perhaps, an easier sell to autonomous charters attempting to define themselves as distinctive schools. As a result, few teachers, beyond the key organizers, felt connected to a larger movement, especially in New Orleans. Organizing efforts may then represent something different, more localized, and not part of a broader, collective effort to change schools--or, at the very least, the structure of charter school unionization makes it more difficult to connect to larger, collective efforts.

### **Discussion**

Emerging literature on unionization within the charter sector, historically hostile to labor organizing, suggests that educators are working to meld the ideology behind charter schools with both traditional and new ideas about the purposes of teachers’ unions (Beabout & Gill, 2015; Malin & Kerchner, 2006; Montaña, 2015). As the charter sector continues to grow, understanding why teachers want unions and how those unions differ from traditional public

school unions is crucial to analyzing the long-term viability of these schools and the career trajectories of the teachers who work in them.

Our findings build on previous case studies, which indicate that teachers turn to unionization to address salary discrepancies, teachers' lack of input in schoolwide decision making, transparency around retention, an excessive workload, and a fear of speaking out (Beabout & Gill, 2015; Montano, 2015). These concerns emerged in our interviews as well, though we also found differences in organizing motivations depending on the school and the local context. Charter unions did sometimes argue for greater bureaucracy (pay scales, seniority, due process) over neoliberal values of efficiency or the flexibility of a business model in education. However, our findings also indicate some of the ways in which charter unions depart from traditional unionism.

In both Detroit and New Orleans, teachers framed their motivations for organizing in terms of their concern for students. Even when they negotiated about traditional union concerns such as pay, benefits, and work hours, teachers emphasized that their goal was to create a stable school environment that would maximize student learning. A major motivator for union organization is to stymie turnover and increase school stability, though ironically, acrimonious union campaigns have increased teacher turnover and dismissals. Moreover, teachers' concerns often transcended the "bread and butter" issues of most union contracts; specifically, and in line with charter-school rhetoric, teachers wanted more autonomy, voice, and control over what they taught, greater opportunities for decision making, and the resources and staff to meet the needs of their more vulnerable students, including English Learners, students with special needs, and students who experience trauma. Teachers critiqued budget decisions made by CMOs that

prioritized administrative salaries and perks over needed materials and educational staff. Many teachers came to education because of a belief in social justice and equity, and they turned toward unionization to actualize those beliefs when they felt that their school fell short. This is far from traditional union discourse about ensuring the dignity of workers and standardizing working conditions. Given the limited research on working conditions in charter schools, our work adds to this literature, identifying teachers' perceptions on their workload and working conditions, and the strategies and tactics they use to change those conditions. Research has found that charter schools, for example, have higher rates of teacher turnover (Stuit & Smith, 2012; Torres, 2014a, 2014b), and researchers have outlined the possibilities in collective bargaining laws to address those concerns (Torres & Oluwole, 2015). Our work, by speaking to teachers directly about these issues, examines the specific strategies teachers are using to address their working conditions, particularly instability due to turnover.

For years, progressive unions and their members have urged unions to move away from a “service delivery” model of unionism toward connecting workers' struggles to larger issues of justice and equity (e.g., Clawson & Clawson, 1999; Martin, 2008); this tension has been especially present in middle-class unions, where gains for members can be seen as disconnected from the needs of the people they serve. Teachers' unions are especially vulnerable to attacks that portray them as self-interested, both because of historical precedent (Golin, 2002; Podair, 2002) and because of class and racial divides between teachers and their students. Our study suggests that the teachers working to organize charter unions were aware of these critiques and had in mind a different type of unionism—one that attempted to connect teacher working conditions to school quality and student outcomes.

We also found a range of administrative practices in response to union organizing, as reported by teachers. Though charter unions are notably weaker than public-school unions—comprised of a small bargaining unit of employees at one individual school—administrators, CMOs, and boards appeared to respond with severity to the campaigns, in several instances illegally firing teachers, attempting to sue them, refusing to recognize the unions, or employing delaying tactics more often seen in the private sector (Bronfenbrenner, 1994; Mehta & Theodore, 2005). These delay tactics were effective precisely because of high turnover at the schools; if administrators could push back the union vote, they could count on a significant portion of faculty to leave—or not renew their contracts—at the end of the year. We also heard from teachers that administrations stoked workers’ fears about unionization, either explicitly around potential job loss or the school closing, both of which are illegal under the National Labor Relations Board, or by suggesting that the union would introduce conflict and confrontation into the work environment—a strategy particularly effective with middle-class or white-collar workers (Cohen & Hurd, 1998). Administrators tried to constitute the shared understanding that management and workers were as a “team” or a “family” working together for a shared goal; unionization would introduce conflict and tear apart that family. By using fear and threats, directly retaliating against organizers, and co-opting union drives, teachers reported that their administrators attempted to defeat union campaigns (Hargadon & Douglas, 2001). Our work sheds light on the types of metaphors that are used in small, mission-driven organizations by leaders to motivate teachers not to join a union.

Finally, we found significant differences across contexts that influenced the rise of union activity. In New Orleans, teachers only started unions at stand-alone charter schools, not part of

larger networks, which were generally higher-performing and perceived as more desirable places to work. In Detroit, where there is a strong history of industrial unionism, teachers were more likely to see themselves as part of a larger labor movement. Due to the proliferation of for-profit charters in Detroit, teachers were more willing to critique CMOs directly and advocate for higher wages and benefits. Our work extends prior case studies by exploring the role of the broader organizational and environmental contexts that shape union organizing.

Our findings suggest several avenues for future research. First, our work suggests that researchers should look beyond student achievement outcomes alone to analyze unions' impact on teacher retention. Qualitative measures, such as teachers' reported job satisfaction, opportunities for leadership, and their sense that their school is properly serving vulnerable student populations, should also be included. Though unions may cost a school more in the short term, stable schools conserve teacher recruitment resources and may provide a more enriching environment for students.

Further, our findings regarding teachers' framing suggest that unions that are hoping to form chapters within charter schools may be more successful if they emphasize the role unions play in decreasing turnover as well as the potential to tailor charter school contracts to the specific needs of the school. Extending existing research on collective bargaining agreements in traditional public schools (e.g., Strunk, 2011) future work could explore and compare the content of charter school union contracts.

Additionally, the teachers we interviewed frequently expressed shock at the administration's punitive response to nascent union campaigns; this study may inform future organizing drives by alerting teachers to some of the challenges they may face. Researchers

could explore the politics of charter school unions. For example, research could explore how national union organizations that have been historically opposed to charter schools view their role in organizing charter school teachers, as well as the various groups that opposed charter unions and their rhetoric.

Our study was limited to charter school teachers in two cities, across two states. Given the high density of charter schools in these two cities, there may be greater urgency around union organizing, since few unionized teaching positions exist, particularly in New Orleans. At the same time, while both Michigan and Louisiana allow collective bargaining in charter schools, they do not require it. In places like Maryland, where charter school teachers must be covered by collective bargaining agreements, teachers' motivations and reactions to union activity may differ. Future research might therefore investigate differences in charter school teachers' unions across state contexts.

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