Perceptions of Trade Unionism Among Unionized School Teachers and Staff: Charter and Public Districts

Noah Cochran

Ohio State University

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INTRODUCTION

The charter school movement historically received support from some Black communities frustrated with segregation and poor educational quality in public schools, as well as conservative groups concerned that public schools were failing due to the Reagan administration's report "A Nation at Risk" (Goodridge 2019). These concerns prompted calls for a school system that received public funding but operated independently of public school systems. It is clear that charter schools have not addressed segregation in schools, as they are now more segregated than public schools are (Frankenberg et al. 2012). Thus, charter schools have not achieved what their Black supporters had hoped they would. Concern has also been raised about a lack of academic accountability and of stability among charter schools due to their high rate of closure (Network for Public Education 2024).

Charter schools are generally not unionized since they are not bound by the regulations that require union representation for staff in public school districts (Barrett et al. 2022). However, in recent years staff from more charter districts have unionized (American Federation of Teachers Massachusetts 2024; Fink 2024; McGowan 2024; Walters 2024). As suggested by the current study, similar research has found that staff desire for a greater amount of voice appears to be a major cause of this trend (Jochim and Lavery 2019). This raises the question of whether unionizing in charter schools can address the school type's shortcomings as described by its critics.

The goal of the current study is to learn about what motivated staff at a charter district to unionize, their experiences with unionization, and how the issues that led to the formation of the union are addressed in a public school district. The results suggest that unionization can address the lack of voice that charter district staff feel to an extent, but not completely. In addition, other

issues may be more difficult to address, such as distrust between staff and administrators. Further, the present study's sample size is small, and thus results are not generalizable and may be skewed.

LITERATURE REVIEW

Charter schools are defined for the purposes of this paper as schools that are publicly funded but operate independently (Murphy and Shiffman 2002). This independent operation allows charter schools to forego many of the regulations which public schools must follow (Manno, Finn, and Vanourek 2000). A regulation which charter schools are not subject to relevant in the context of this study is the requirement of a collective bargaining agreement (Kauffman 2013)

The charter school movement began as a response to public schools' perceived failings. One group that advocated for charter schools was some Black communities who felt that educational quality for their children was not improving and saw that schools were not integrating (Goodridge 2019:288–89). Another was conservative groups convinced by the Reagan administration's report "A Nation at Risk" that public schools were failing. The report argued that America had become complacent with its mediocre public school system, which had become that way due to the involvement of an oversized government (Goodridge 2019:289). It claimed that the country needed to improve its educational system to better compete against the second world during the Cold War. Both groups felt that establishing school systems outside traditional public schools was a way to create schools that avoid the public school system's issues. These reform efforts began to succeed with the passage of the first charter school laws in the early 1990s. By 2022, charter schools made up eight percent of public schools and seven percent of public school students attended charter schools (National Center for Education Statistics 2022). Forty-five states and the District of Columbia have laws permitting the formation of charter

schools. Their near ubiquity underscores the importance of considering charter schools' effects, whether they are positive or negative.

Critics of charter schools see their success as a significant problem, citing a lack of accountability for charter schools due to their high closure rates (Network for Public Education 2024). They also take issue with the public funds allocated to charter schools through state voucher programs (Thomas 2024). Although one goal of the charter school movement was to reduce segregation, those opposing charter schools argue that the movement has failed in this (Frankenberg et al. 2012). Lastly, research suggests that charter schools consider students with special needs at lower rates than students without special needs, and that special education programs in charter schools are lacking (Bergman and McFarlin Jr 2020; Center for Learner Equity 2024). The present study does not examine attempts to address these issues, as the goal of the union drive is solely improving staff working conditions and not addressing other issues associated with charter schools.

Although charter schools have historically had low rates of unionization, a number of charter schools have started union drives in recent years (American Federation of Teachers Massachusetts 2024; Barrett et al. 2022; Fink 2024; Jochim and Lavery 2019; McGowan 2024; Walters 2024). However, it is not yet clear whether unions established in charter schools are able to address the issues associated with charter schools or to improve working conditions more broadly (Jochim and Lavery 2019).

Research on union gains in public schools similarly yields mixed findings. For instance, unions' wage impacts can differ based on the time period and teachers' well-being can differ based on the legal status of unions (Han 2019; Merkle and Phillips 2018). Thus, there is a need for research to

clarify what unions are capable of addressing in public schools and whether they can make similar improvements in charter schools.

METHOD

Initial participants were contacts of the researchers. Additional respondents were recruited through snowball sampling. Participants were emailed and/or text messaged a copy of the recruitment script (see Appendix A). The sample included three staff at a charter school district which has recently formed a union and six staff at a public school district, meaning that nine interviews were conducted in total. Interviews with charter district staff averaged one hour and fifteen minutes in length, while interviews with public district staff averaged forty-five minutes. The inclusion criterion was that interviewees were members of or were represented by a teachers' union.

Interviews took place via the Zoom recording and video meeting software and were recorded using Zoom (Zoom Video Communications, Inc. 2024). Verbal consent was obtained.

Interviews were semi-structured and qualitative following the model put forth by Robert Weiss (Weiss 1995). Questions (the interview guide can be found in Appendix B) involved background questions on the interviewee's career, their opinions of and experiences with the union, questions about issues and how they were addressed, and misconceptions the public has about unions. At the end of each interview, respondents were asked if there were any other topics they wanted to discuss or any questions they felt should have been asked. Charter staff were asked about the process of forming the union. Public district staff were asked how the issues mentioned by charter staff are handled at their schools. Questions were modified based on responses. For example, a question about relationships with management was changed to use the word

administration, as that was the word most interviewees used. The question asking specifically about relationships with district management was changed to ask about district-wide decisions and the level of influence teachers feel they have on those, rather than relationships. This was due to all previous public district respondents reporting low levels of personal interaction with district-level administration. Lastly, one public district interviewee suggested that I ask about interviewees' opinions of charter schools and the school voucher program in place in the state where this district is located. This program allows parents to choose to have their children attend charter schools for no cost rather than attend public schools.

Interview transcripts were coded using selective coding for the first round. Second-round coding examined the prevalence of codes and excluded those codes which were not salient in at least two interviews.

FINDINGS

Organizing at a charter school

Some of the charter district staff interviewed seemed to agree with the charter school philosophy and the lack of regulation associated with it, while others were indifferent or disliked the environment this philosophy created. However, all charter staff interviewees were opposed to the changes that have occurred at the district in recent years. These changes were described by the interviewees as having taken away their voice in decision-making and by one interviewee as an attempt to control employees. He described the district-level administration's indifferent attitude toward staff feedback:

"…my voice didn't matter to them. They thought they knew better than everybody, and they don't care, truly just don't care about getting feedback or making changes. It's very much about power

and control, and very much about them being right and having to project strength than it is about like doing things the right way or doing what's best for kids and you know, acting with some kind of humility. And that's a huge shift, from the previous person to the new superintendent."

The charter district social workers (who made up the entirety of the charter district sample) reported a lack of accountability among district-level administration as a major issue and the cause of most other issues. Other specific issues described by charter staff include high turnover, a decision to reduce paid time off (PTO), and a general lack of trust from management and of an ability to have a voice. These interviewees described the inability to retain staff as a prevalent problem and one with significant negative effects on both staff and students. Charter district staff described how teachers have to supervise students during their lunch breaks and are forced to cover each other in place of having substitute teachers:

"[Charter district] doesn't have a substitute system. So if a teacher is out, or if there's a vacancy, it's all covered by other teachers, which is a big deal, because elementary and middle school teachers don't get a lunch. They eat lunch with their students. So if you only got a 45 minute break all day and then that got taken because you have to cover somebody else's class because we don't hire a substitute teacher. Teachers are teaching with students face to face for 8 hours a day, which is just huge. It is incredibly rare to find a school that forces teachers to do that as the norm."

During the process of unionization (October-November), the administration's anti-union campaign forced teachers to cover for each other due to union-busting meetings that went over the scheduled times.

Charter district staff described the sudden decision at the beginning of the 2022-2023 school year to reduce PTO and stop carrying over PTO days to the next school year as the defining issue that led to the union campaign. This decision came after staff had already committed to working at the charter district for the school year. The decision also coincided with a decision to move intervention specialists between schools without consultation. The issues described were not affecting just the staff interviewed as part of this project, but also the teachers at the district. Due to their role as social workers, these staff were tasked with the extra burden of providing counsel for teachers upset by the administration's decisions. This was an incentive for one interviewee to organize:

"…what was going on at the time was just a lot of teachers--because, you know, we're in that social work position--I had a lot of teachers crying in my office. Teachers going through it, and part of the stuff that was happening was a result of decisions being made…So my main motivation was literally remembering teachers crying in my office about stuff."

Another major issue at the charter district was lack of notice about personnel-related decisions. In addition to moving intervention specialists between schools, one charter district interviewee's self-reflection was turned into his mid-year evaluation.

The social workers and a group of teachers had discussed unionizing before these decisions, but these discussions were more of a way to plan for a situation when they thought unionization would be necessary, which was not what they thought at the time. After the decision about the PTO, they put the plan into action. They contacted the state chapter of a national teachers' union and began asking staff to sign union cards. When they had enough cards, they brought them to the superintendent in November 2022. The district initially fought their request for a vote, but when the vote did happen in May 2023, the union won with 70% support. Throughout the

process, staff filed unfair labor practice (ULP) charges on incidents such as the anti-union meetings. Bargaining began in July 2023 and was still ongoing when I spoke to the staff members.

While the union drive did have the support of most staff at the charter district, opposition to the union grew as the drive progressed. Reasons for hesitancy about the union at the charter district included fear of retaliation, fear that it would harm relationships with building-level administration, and concern about union dues.

In order to understand the extent to which unionization can address issues faced by charter school staff, we need to understand the extent to which unions are able to address issues in public schools.

Collective bargaining and voice in a public school

One teacher reported that, like at the charter district, teachers feel a lack of voice and that little was being done to address this. However, others mentioned that they can join committees of teachers that focus on specific issues, and that their voices are able to be heard this way. Another teacher described the instructional leadership team (ILT) as having considerable influence on how district-level decisions are enacted at the school level and described the ILT as representing teachers' positions well. Lastly, the union wields its power in settings such as school board meetings to convince the district to consider the position of staff. Interviewees reported that the district usually acquiesces in these situations. The charter district does not have a comparable entity that is able to represent its staff. This means that their voices are not heard and thus, that other issues that they have are not addressed. This is the core reason for the formation of the union at the charter district.

What the union can address

Issues reported at the public district included interpersonal disputes. These involved conflicts between two teachers, between teachers and administrators surrounding evaluations, and between teachers and students or parents about grades and discipline. One interviewee said that if they escalate, the union can help resolve these issues. He mentioned a colleague who posted inappropriate material on social media and was fired as an example, and he felt that the firing was justified. The union was not successful in helping this teacher retain his job. The interviewee reported that he felt that if he were unjustly fired, the union would protect him. Another interviewee reported that he thought the union would not even defend those who did not deserve it. A high school horticulture teacher similarly reported low turnover, no problems with PTO, and did not report conflict between management and teachers.

One public district teacher reported similar feelings to one of the charter district staff regarding staff autonomy:

“Yeah. I mean, deciding curriculum, deciding classroom policy. You know, those kind of things. I'm very fortunate to be at [current school] for the last 6 years. I have had an extraordinary amount of autonomy when it comes to my curriculum there, but that was definitely not the case in the first 10 years. I have experienced everything from, you know ‘This is the book we're teaching’ to ‘this is what you're teaching on this day.’ It can really kind of run the gamut, but there's always kind of limitations. And you know, as teachers, we're used to material limitations. Your curriculum is limited by what books you actually have available. But it's become more than that. The fact that people are considering themselves experts and knowing what's best for students when they have no clue, they don't have the experience or the education to claim that expertise.”

This teacher values autonomy in deciding curriculum and classroom policy, values similar to those promoted by charter schools (Holley 2021). This was in contrast to some other public district staff, who felt that a previous administrator had given teachers too much autonomy.

One teacher reported feeling that teachers can get issues not addressed by the union addressed by bringing them up with administrators.

Teachers reported good pay schedules and the speech language pathologist reported a good pay improvement plan:

"…they changed our salary schedule. There was a level of Master's plus 30. And then there was if you got a PhD. But they made the PhD Master's plus 45 because a lot of teachers keep going and getting more hours of training in school, because you have to always be getting hours for your teaching certificate. But not a lot of times does the right hours and stuff come together to actually get a PhD, so yeah, the PhD people are mad, but having the Master's plus 45 as the highest pay scale, 'cause I've been there long enough and have enough Continuing Ed, I was able to get to that. And then they also looked at, to get the Master's degree in speech pathology, it takes a lot more credit hours than it does for a teacher to get a Master's degree. So, they also, recently, if you had more than 34 graduate-level hours that you needed to get your Master's degree, you were allowed to start applying this, your Master's plus 30. So, I actually jumped from Master's which I had from the beginning to Master's plus 45. So that really helped my salary. So, for them, it took a lot of actually advocating by speech therapists. We had asked for it, for like every contract, year after year after year, that since we require more graduate hours to be counted, and so they finally did it."

Some teachers reported that the union is very politically involved, engaging in such activities as encouraging teachers to work as poll watchers or canvassing for levies.

In sum, public district staff described the union as able to assist with disputes with students, legal issues, pay, benefits, retirement, medical leave, hiring and firing, class size and work environment, evaluations, time off, and health and safety issues.

The union's limitations

Although staff have methods to make their voices heard, their positions are not always considered nor their suggestions implemented, and sometimes there is a lack of notice about administrators' decisions and new policies. One public district respondent and one charter district respondent reported that creating change as a staff member was more difficult and/or took longer in large public districts than in small charter districts:

"I guess the opportunity to be involved in the decision-making processes and how the school's operating, I had a lot more opportunity in the small charter school in [another state] versus at [current school]."

Another teacher described having little notice about district-level and school-level decisions and the administration's expectations as being unreasonable, while a third described being annoyed by teachers complaining about these issues. Similarly to their lack of a voice in school-level decisions, some teachers felt a lack of trust from administrators. Access to the district-level administration was described as much more limited at the public district but also becoming limited at the charter district. When asked about whether she feels teacher input is considered in district-level decision-making, one interviewee answered "sometimes." This teacher also mentioned that she often feels strained for time preparing for changes that have been made in

addition to preparing for her classes, particularly due to the short notice given for many decisions:

“So, this year the district had us switch over to a new learning management system and a new attendance system. We didn't have any extra time to learn those things or prepare for those things on top of all the other stuff we were preparing. So, it just feels like teachers are almost forced to work outside of their contract hours in order to be prepared.”

While staff at the public district feel that they can have most issues addressed through the union or other means, this is not the case for all issues. For instance, two interviewees reported high turnover among administrators. One reported this as being due to under preparedness for the positions, which can put teachers under additional pressure:

“…there’s been a lot of turnover of administrators in our school. And I do think sometimes we get administrators that lack experience and are probably not the best fit for that position, and the teachers end up bearing the brunt of that by being treated unfairly because the administrator is in over his or her head.”

The other interviewee said that this turnover was due to administrators leaving to become principals elsewhere in the district:

“…a lot of times we have turnover with administrators because they leave for principal jobs. So, I've had so many assistant principals through the years, so they usually stay with the district, but they'll go to a different building, so they can be the head principal, and they don't want to be the assistant principal.”

One of these interviewees also described turnover among janitors as high due to students not keeping the school clean, but the janitors are represented by a different union and were not

interviewed in this study for that reason. A teacher at another school reported low turnover, but that it has been higher in recent years. Planning for activities focused on community-building (only done at some of the public district's schools) shifted from being paid and done during school hours to being done outside of school and unpaid. This increased time-related pressures on teachers and may be one reason turnover has increased at this school in recent years. Teachers at the public district agreed with charter district staff that staff turnover can negatively affect students.

Another issue reported was understaffing, which is an issue also reported by the charter district staff. In the case of the charter staff, this means that teachers need to arrive at school early to facilitate drop-off, while in the case of the public district teacher, this means that she is sometimes short on time and has to teach more students than she feels she can handle. A speech language pathologist also did not report many problems with turnover, PTO, or the administration. However, she did report having a high caseload, and she felt that the state maximum caseload was too high. She also reported one conflict with a school administrator. The majority of the respondents mentioned a district administrator who was fired due to, in the words of the speech language pathologist, "not doing her job." This caused delays in information about placements for the next school year, including information about whether staff were going to be re-hired for the next year at all. However, this teacher also described district-level problems as not immediately affecting individual schools. In contrast to the feelings the charter staff had around control and autonomy, two teachers reported administrators being hands-off as a problem. One reported that this was because it made teachers think administrators were too busy and did not prioritize checking in with teachers, and one felt that it enabled teachers to slack off.

One teacher at a high-demand school described the students as entitled but smart. This teacher reported that another school in the same district where he previously taught had discipline problems but less entitlement. This suggests that despite the description of the school as a destination school, teachers can still face issues with the students.

Some teachers felt that too much emphasis is placed on testing. Anti-critical race theory (CRT) legislation was cited as another issue, but the teacher reporting this blamed it on state and federal legislators.

Some interviewees reported issues with student use of technology, and one school implemented their own phone pouches. A district-wide decision without teacher input later made pouches mandatory for all schools.

While some teachers were impressed by the union's political activism, one reported disappointment that the union claimed a progressive political position but was unwilling to take a progressive stance on political issues. Another teacher thinks the union could help force his school to clear up its policy on intruders in the building. Lastly, a teacher reported a situation in which one teacher was bullying others.

DISCUSSION

A number of individual issues contributed to the union drive at the charter district, but what distinguishes the charter district from the public district is that public district staff feel that administrators are forced to at least listen to their concerns. The lack of any concern for or attempts to address staff issues at the charter district left the staff feeling like they needed to form a union to force the district to listen to and address the issues that they face. All the public district schools where interviewees work are destination schools, so teacher turnover is not a major

issue. However, the charter district's extensive resources for social workers similarly attracted some of the interviewees to that district. One of the interviewees was employed at the charter district before these extensive resources were available, and while he described a number of issues at the district at that time, he felt that the administration was interested in providing him the resources and help he needed to address those issues. This interviewee described a change in the membership of the administration and in its attitude that meant that it was no longer willing to even listen to staff concerns.

The experiences of the public school staff suggest that the charter school's union may be able to address some, but not all issues. The union will likely be able to advocate for staff and give them a voice in decision-making, but the extent to which this is possible will depend on the willingness of administrators to cooperate. Administrators must not only listen to staff concerns and opinions but must actually take them into consideration for staff to truly have a voice. The union may also improve staff pay, job security, and protections against retaliation from administrators.

CONCLUSION

The current study suggests that although a variety of individual issues contributed to the union drive at the charter district, a lack of voice was the major underlying issue. If staff voices are considered, they can have an impact on district policy and decision making. Interviews with public district staff suggest that unionization will be able to help give charter staff a voice, although staff opinions may not always influence final decisions. Unionization might also be able to help staff make gains in other areas.

Limitations

This study's sample size was small, particularly the sample size of charter district interviewees. The charter district schools studied here are also not currently destination schools for staff, although they have been in the past. The charter district's performance rating is lower than that of the public district schools from which interviewees were selected. The charter school's performance rating is higher than many schools in the city's public district. Thus, while the public schools where interviewees work may be better able to attract staff due to their academic excellence, this factor may not be as big of a draw for the charter district. The public schools from which interviewees were recruited were, on the other hand, described by one interviewee as "destination schools." This meant that issues differed significantly between the two sets of interviewees, making it difficult to compare how the same issues are handled at each district. For example, turnover was low at most of the public schools. An ideal sample would compare districts with similar academic performance.

Directions for Future Research

While the charter district interviewees featured in this study described forming a union in order to increase their voice in decision-making, one interviewee suggested that change would not occur unless the district administration was willing to change their attitude toward considering staff feedback. Similar research also suggests that improvements after a union drive may not always be clear (Jochim and Lavery 2019:14). Future studies could examine whether change actually takes place when charter schools unionize.

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APPENDIX A: RECRUITMENT SCRIPT

Email Subject Line: Interview Study: School Staff Perceptions of Unions

Hi [Name], this is Noah Cochran from Ohio State University. I am writing an undergraduate thesis about school employees' perceptions about their unions and what they do, both positive and negative. The interview will take about an hour to an hour and a half of your time. If you or someone you know might be interested, I can be reached at cochran.545@osu.edu or at [phone number] to set up a time. Thank you.

APPENDIX B: INTERVIEW GUIDE

Interview Guide for Charter District Interviewees

1. Background: What is your current position? What grades and subjects do you teach (if applicable)? How long have you been a teacher/social worker? How long have you been at [charter district]? What made you want to be a teacher/school social worker? (If disappointed) What is it actually like?
2. What do you like most about working at [charter district]? (Probe for details)
3. What do you like least about working at [charter district]? (Probe for details)
4. Where/who did the idea to form a union come from? Key issues? Who is causing these issues? District structure, whether there is a board, etc. Were there any groups of staff who would say that there were other types of issues? What would those be? Was everybody on board at first, if not, how did that develop? How did it spread? How did you feel about the drive, and how do you think other people felt? Why did you feel that way? Problems other teachers/staff were concerned about? Are there ways that affects you? Were some people in favor, some against? What were those conversations like?

When did the drive start? Did anything happen before that that you think caused it? Why do you think it succeeded? Did it succeed on the first vote? If not, how were people convinced to change their minds? Were teachers and other types of staff on the same page? What would be some areas where they might have different issues? Do you know of anybody who left because they were opposed to the union or because the situation was bad, and they did not think the union would help?

5. How do you think the atmosphere will change? Public charter vs other types of schools. Will being a charter school affect the impact of union, why? Why is this school one of the first charter schools to unionize? Is a union more or less needed at public charter, why? (If taught at non charter) Are the working conditions different because it is a public charter?
6. What are some of the issues at the school that you think that the union can/cannot address? Other issues we have not talked about as much that they might be able to help with?
7. Relationships with school administration, what have they been like, how do you think they will change? Relationships with district admin, what have they been like, how do you think they will change?
8. What does union representation mean to you?
9. What do you like most about being a member of your union?
10. What do you like least about being a member of your union?
11. Other schools where you have worked. Were they unionized? Benefits, problems with being unionized at those schools?
12. What should the public know about teachers' unions that maybe is not well understood?

13. Is there anything you think I should ask about that I have not, or anything else that you wanted to talk about, but have not had a chance to?

Interview Guide for Public District Interviewees

1. Background: What is your current position? What grades and subjects do you teach (if applicable)? How long have you been a teacher/social worker? How long have you been at current school? What made you want to be a teacher/school social worker? (If disappointed) What is it actually like?
2. What do you like most about working at your current school? (Probe for details)
3. What do you like least about working at your current school? (Probe for details)
4. What problems did you have in the past? How were they addressed? Key issues? Who is causing these issues? I understand you are represented by a union. How does that work? Has the union helped with anything? What issues can the union address, what can't it address? Are there any groups of staff who would say that there were other types of issues? What would those be? Are there ways those issues affect you? Have you experienced problems with management trust in teachers, PTO, power, turnover? How do you think things would be different if you did not have a union?
5. Other issues we have not talked about as much that they might be able to help with? Are there things the union should do but has not? Has the union helped with giving you a voice?
6. Relationships with school administration, what are they like? Decisions, voice, notice? Decisions from district administration, do you feel like you have a voice, notice?
7. What does union representation mean to you?
8. What do you like most about being a member of your union?

9. What do you like least about being a member of your union?
10. Other schools where you have worked. Were they unionized? Benefits, problems with being unionized at those schools? (If taught at nonpublic) Are the working conditions different because it is public? Union more or less needed at public schools? How do you feel about charter schools and the voucher system?
11. What should the public know about teachers' unions that maybe is not well understood?
12. Is there anything you think I should ask about that I have not, or anything else that you wanted to talk about, but have not had a chance to?