RETAINING TEACHERS IN THE TEACHING UNION IN ONE URBAN DISTRICT

IN MICHIGAN, A RIGHT-TO-WORK-STATE

BY

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DEDICATION

I dedicate this dissertation to all my former, present, and future students who always

remind me to dream big!

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ABSTRACT

The purpose of this study was to identify the transformational leadership traits suited for

retaining members in the local union in this urban district in Michigan, a Right-to-Work

state. Policy like *Janus v. AFSCME* has impacted members' views of educational union

leaders and thereby the membership retention number. Before Right-to-Work and *Janus

v. AFSCME,* teachers had to be in the union, so there was no retention problem unless the

district had a retention problem. Resulting from this membership loss is the loss of

collective bargaining rights and powers, which affects the classroom environment, lives

of students, and the lives of teachers. The finding in this study suggested transformational

leadership traits can contribute to retaining members despite outside factors like public

policy. This study was a qualitative single case study of one local teaching union in an

urban district in Michigan. The purposive sample was selected from the Local

Association. Five local leaders were interviewed, and 11 members of the organization

were interviewed using open-ended questions created from the MLQ 5x short

transformational leadership questionnaire. Interview responses were coded into specific

themes using the research questions as a framework for coding. By identifying the

leadership traits that best address this issue of retention, a framework was created for

teaching unions in similar situations and circumstances. This framework and these

recommendations can help teaching unions struggling with retaining members work to

retain those members. Not every teaching union in the United States is subjected to the

same circumstances as the Local Association in this study, therefore other types of locals

in different states should also be studied to gain further insight into successful leadership

traits in teaching unions.

CHAPTER 1: INTRODUCTION TO THE STUDY

The phenomenon of right-to-work, the Supreme Court decision from *Janus v. AFSCME* and the increasing decline in the number of teachers and teacher candidates has caused the strength of teaching unions to diminish over time, specifically in the state of Michigan since 2012. Right-to-work laws required that employers offer positions and advancements to both union and non-union employees. Also, right-to-work disallowed automatic union membership as a condition of employment. *Janus v. AFSCME* further disparaged union membership by making agency fees or agency shop federally illegal. Dunn (2018), in a review of the oral arguments of *Janus v. AFSCME*, argued unions are inherently political and inherently tied to the law. Associations cannot be separated from policy; therefore, policy affects the ability of unions to retain members (Dunn, 2018). In Michigan, only certified teachers are eligible to join the local, state, and national union associations and must resubmit an application each time they change districts of employment (Dunn, 2018). All these factors have led to a diminishing role and strength of the teaching unions. I designed this study to determine the local union leadership traits best suited to retention.

Study Background and Foundation

In a review of labor history in the United States, Fisk (2018) suggested labor law, labor relations, and treatment of workers are not simple issues and have long been considered a matter of social justice, like the Civil Rights Movement. Fisk (2018) also argued that freedom of laborers and consumers in the United States coincides with First Amendment rights and responsibilities. Therefore, labor laws like right-to-work laws instituted in Michigan in 2012 and the contemporary Supreme Court decision of *Janus v.*

AFSCME have weakened labor unions by diminishing the associations' ability to employ the First Amendment of the Constitution, to bargain a fair contract, and to strike against unfair labor practices (Fisk, 2018). These policies also diminish union numbers and strength, thereby lessening the amount of money a local has through membership (Fisk, 2018). Additionally, Ferguson (2018) wrote a review of the role of federal law in education. Ferguson (2018) suggested that the federal government not only played a role in labor laws and relations but also in all areas of public education. These areas include but are not limited to: Every Student Succeeds Act, discipline, curriculum, special education and instruction, students with disabilities, and the school-to-prison pipeline. Ingrained in all aspects of the teaching career, the federal government plays a role in unionization (Fisk, 2018). The state legislature and policy legislation also play a role in shaping the teaching career and the ability of teaching unions to retain teachers and function (Dunn, 2018).

Coinciding with the laws working against labor organizing is the teaching shortage occurring all around the United States, including Michigan (Yaffe, 2016). Yaffe (2016), in a review of the teaching shortages in the United States, determined that the deficits were not lessoning and are progressing as the years continue. In addition to the labor laws, educational policy in Michigan is also adding to the decline of teachers and teacher candidates (Dunn, 2018). White (2018), in a study on educational policy, determined that state and federal lawmakers often do not listen to the educators, the state and federal policy affects. One area where teachers and state policymakers often disagree with one another is the teacher evaluation process (White, 2018). In Michigan, the teaching evaluation system is one that the individual school district creates, and the

teaching union cannot bargain said evaluations. Teaching evaluations are a prohibited subject of bargaining for teaching unions. The state also sets specific parameters surrounding the teaching evaluation that each district much incorporate. During the 2019-20 school year, student growth will decide 40% of a teacher's evaluation. The district picks the goals for the growth calculation. Evaluations are also a prohibited subject of bargaining but are the determining factor in teacher employment. Since policy factors such as the teaching evaluation, and labor laws created through policy, such as right-to-work laws, are weakening both the profession and professional union, educational leaders, especially those in union leadership, will have to develop leadership traits suitable to address the issue of retention in a contentious era.

Current State of the Field in Which the Problem Exists

In a review of policy-making decisions, Podolsky et al., (2017) suggested a decline in the number of teaching candidates in the United States and a decrease in the number of teachers remaining in the profession. For example, in Philadelphia, in 2016, 190 unfilled vacancies were requiring a certified teacher (Yaffe, 2016). According to the Learning Policy Institute's (2018) statistics on teacher shortages, the United States experienced a teacher shortage of 112,000 teachers, with urban school districts suffering from shortages.

Several factors contributed to the decline in the retention of teachers, including those at work in Michigan. Some of those factors are teacher preparation, hiring processes, compensation, professional support, and working conditions (Podolsky et al., 2017). Another area where policymakers have added to the lack of teacher retention in Michigan is the teaching evaluation (Lenhoff et al., 2018). Robertson-Kraft and Zang

(2018) conducted a case study of one teaching evaluation system. They found that the implementation of the teaching evaluation is integral to the ability of a district to retain teachers, and thereby it should be relevant to local teaching unions (Robertson-Kraft & Zang, 2018). Lenhoff et al. (2018) investigated the role of policymakers in the state of education across the United States. They determined that the part that legislators play, both in state governments and the federal government, will need to address teacher retention if the legislators want to address the teacher shortage (Lenhoff et al., 2018).

Crouch (2017) studied the decline of union membership across Western societies. Crouch (2017) concluded that union strength diminishes when union numbers diminish, which means, in states like Michigan, union strength is declining due to Right-to-work laws. With the recent Supreme Court decision of *Janus v. AFSCME*, unions' abilities to collect dues and require membership through agency shop is now illegal (Osborne-Lampkin et al., 2018).

Historical Background

Osborne-Lampkin et al. (2018) described the rise in teaching unions and union powers beginning in the 1960s. The two national associations, The National Education Association and The American Federation of Teachers are listed as the two most powerful collective unions in the country by the 1990s. The labor movement of the Progressive Era in the United States set the stage for the labor movement among teachers leading to the growth of the two national organizations (Osborne-Lampkin et al., 2018). With this rise of power and union strength came lobbyists and laws seeking to disrupt the power continuum. Laws such as The Public Employment Relations Act 336 of 1947 in Michigan were the beginning of legislation proposing the diminishment of the power of

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certain labor groups in the state by limiting the ability of that public sector and labor unions to strike or bargain over specific topics. What followed over the next few decades are more policies in Michigan that further weaken the labor unions in the state through laws adopted by the legislature, such as right-to-work laws in 2012 (Oas et al., 2016). In a legal rights perspective, Oas et al. (2016) suggested right-to-work legislation harms labor unions.

Deficiencies in the Evidence

While researchers George et al. (2018) studied the effects of right-to-work laws and *Janus v. AFSCME*, the phenomenon of this level of resistance to collective bargaining and union membership is something that occurred before the Progressive Era and not since, until now. Schrank (2019) assessed the viability of labor unions in the United States and suggested union membership has dropped from 30% of the labor force postwar to under 10% currently. These drops in membership numbers have directly coincided with the policy fight against labor beginning in the 1970s (Schrank, 2019). Henig and Melissa (2019) observed right-to-work laws as a policy that could breathe new strength into organizing labor. Given that this area is relatively new to the study of educational leadership, there exists a gap in how to address the decline of union membership and how to retain those members under the current constraints and set of circumstances (Henig & Melissa, 2019).

For example, according to the Michigan Education Association (2019b), the local union is taking part in this proposed study has gone from 100% membership to 85.4% membership in the past three years. Some education locals have more success than others in retaining members, which could be a direct result of the type of districts in which the

educators work since urban communities see a higher turnover rate than suburban areas (Henig & Melissa, 2019). For example, another urban district in Michigan with similar demographics to the district in this study has seen a decline in union membership since 2012, going from 100% membership to 57% membership in September 2019 (Michigan Education Association, 2019b).

<h2 style="text-align:center">Problem Statement</h2>

There is a problem with retaining teachers in teaching union locals in the right-to-work state of Michigan, especially in urban school districts. This specific problem directly impacts the strength of the union and the ability of the association to negotiate working conditions, which directly affects teaching and learning conditions (Hogler, 2017). Holger (2017) studied the effects of Donald Trump's election victory on labor unions and the strength of organized labor. Hogler (2017) suggested Trump's political agenda and policies will not only aid the decline of union members and retention but also will contribute to the growing inequity between the wealthy and the working class.

Understanding how leadership traits contribute to retaining members in a teaching union in an urban school district in Michigan, a right-to-work state, will also impact the ability of an area to retain teachers. For example, Wronowski (2018) suggested teachers feeling supported and having a voice could potentially support retention in urban districts even if the political and social climate is challenging. Therefore, local leaders can display traits that demonstrate support to retain teachers in the union.

Audience

The intended audience of this study is K-12 educators, K-12 administrators, K-12 union organizations, and K-12 union leadership in right-to-work states that contain urban

school districts. Teacher retention significantly affects many stakeholders, including students, the community, district administrators, and leaders, and changes to the climate and culture of the school building and district (Grissom & Bartanen, 2019). Grissom and Bartanen (2019) studied leadership traits in principals who successfully retain teachers and concluded leadership is one of the essential factors in retention; therefore, maintaining members in teaching unions is also applicable to building level and district level leaders. Young offered (2018), in a study on hiring and retaining effective teachers, that keeping teachers is a crucial indicator of student success outcomes. The stakes are high when referring to teacher retention. Therefore, leaders from all areas of educational leadership must develop leadership traits to address the retention crisis (Young, 2018). Leaders must learn to operate in a climate and culture where policy, such as right-to-work and the Supreme Court decision in *Janus v. AFSCME*, enables workers in certain professions to no longer join unions (Young, 2018).

Specific Leadership Problem

Marianno and Strunk (2018) determined the era of a new policy on labor unions will continue to weaken the ability of those labor unions to affect change in working conditions, including teachers whose working conditions are teaching and learning conditions. The specific leadership problem addressed in this study is how leadership traits affect the retention of teachers in the local teaching union in an urban district in Michigan where the teaching local must contend with right-to-work and the Supreme Court decision in *Janus v. AFSCME*. There are several other challenges in this specific problem. Because of the right-to-work limitations, teacher turnover plays a significant role in the union's ability to retain members (Marianno & Strunk, 2018). Wronowski

(2018) studied the recruitment and retention of teachers in urban districts and concluded that policy, evaluations, pressure, and climate play a significant role in retaining teachers. Heightened are these factors in urban areas (Wronowski, 2018).

In a review of educational policy, Berry and Shields (2017) described the decline of teacher recruitment nationally. Enrollments in teacher preparation programs across the nation dropped 35% in 5 years (Berry & Shields, 2017). Kraft et al. (2016) studied teacher turnover in association with climate and culture. Kraft et al. (2016) determined teacher turnover is higher in urban districts than in suburban communities and even worse in high-needs subject areas like mathematics and special education. Due to right-to-work, each hired teacher must reapply for the union each time they change school districts (Dunn, 2018). *The Detroit News*, in an article from September of 2018, described the teacher shortage as critical and urgent from the northern parts of the state to the city centers of Detroit and Lansing (Chambers, 2018). Therefore, if the teaching local can successfully retain members, the district will successfully retain teachers benefiting both the union and the district.

Purpose of the Study

The purpose of this study was to identify which leadership traits contribute to higher teacher retention in the union since the inception of right-to-work laws in the State of Michigan. The retention of teachers in the union in Michigan has declined since the adoption of right-to-work in 2012 (Michigan Education Association, 2019b). The recent Supreme Court decision in *Janus v. AFSCME* and the current push for states adopting right-to-work laws, unions, specifically teaching unions in urban districts, are suffering and losing membership. Before *Janus v. AFSCME*, teachers had to belong to the union,

so there was no retention problem unless the community has a retention problem. These policies are the catalyst for the retention issue with the union.

Resulting from this membership loss is the loss of collective bargaining rights and powers, which affects the classroom environment, lives of students, and the lives of teachers. By identifying the leadership traits that best address this issue of retention, I created a framework for teaching unions in similar situations and circumstances. Identifying and applying these traits may help locals keep union membership numbers high, thereby maintaining the local's strength, contributing to better working and learning conditions in the district (Grissom & Bartanen, 2019).

Methodology and Research Design Overview

This study was a qualitative, single case study. The case was the leadership of the Local Association, which is a subsidiary of the Michigan Education Association and the National Education Association. Interview questions were asked of key leaders in the Local Association and from a sample of the Local Association dues-paying members. These interview questions incorporated the transformational leadership theory. The goal of the study was to determine how effective both members and leaders believe transformational leadership traits are on the ability of a local to retain members. Also reviewed were necessary artifacts.

Creswell and Poth (2018) suggested that in a qualitative study, the sample must fit the methodology. The population, in this case, is the Local Association in one urban district in Michigan. The type of sample selected from this population was a purposive sample. Interviewed for the study were five local leaders and 11 members of the organization. The interviews were open-ended and included questions about leadership in

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the organization. Reviewed were qualitative documents, including membership documents for the Michigan Education Association for the Local Association, qualitative audio, and visual materials, including social media text, member emails, and the organizational website. Once I collected the data and analyzed the data by common themes, the interpreted ideas developed from the research questions as a framework for interpretation were applied to transformational leadership traits.

Research Questions

The following questions guided this qualitative study:

Q1: How has right-to-work and the Supreme Court decision in *Janus v. AFSCME* affected teachers' views of the union leadership?

Q2: How does the local leadership believe transformational leadership traits and behaviors contribute to membership retention?

Q3: How do the local members believe transformational leadership traits and behaviors contribute to member retention?

Study Limitations

This study was a case study of one organization in one state. State laws affect right-to-work standards, so while the whole country is subject to *Janus v. AFSCME* Supreme Court decision, not all states are right-to-work. I also focused on a progressive, organized local association, which does not fit a blanket mold. This local is also a union that exists in conjunction with an urban district with high turnover rates among teachers. These limitations can be mitigated by focusing on leadership as compared to the boundaries of the case. Many union locals in many states may benefit from the findings of this study, especially those located in urban districts in right-to-work states.

Study Delimitations

With the current political climate in Michigan and across the United States on unions, the results of the study may only apply to unions in certain circumstances. The results of this study may only successfully assist teaching local associations in the United States, in a right-to-work state, in an urban school district. While leadership traits apply to many situations, the effect of those traits in this type of retention may only apply to a small subset of union populations.

Study Significance

The recent Supreme Court decision in *Janus v. AFSCME* and the current push for states adopting right-to-work laws, unions, explicitly teaching unions in urban districts, are suffering and losing membership. Before *Janus v. AFSCME*, teachers had to remain in the union, so there was no retention problem unless the district had a retention problem. These policies are the catalyst for the retention issue with the union. Resulting from this membership loss is the loss of collective bargaining rights and joint powers, which affects the classroom environment, lives of students, and the lives of teachers. By identifying the leadership traits that best address this issue of retention, a framework was created for teaching unions in similar situations and circumstances.

Definitions of Key Terms

Before the decision in *Janus v. AFSCME*, the local teaching unions across the country could collect a fee from nonmembers, if right-to-work did not bar them from doing so. This term is referred to as *agency fees.* (Dunn, 2018).

BUMs refers to a bargaining unit member or a member who is in good standing (Michigan Education Association, 2019b).

Charlotte Danielson refers to a model for teaching evaluation focused on what students are doing and learning instead of what teachers are doing and teaching (Pharis et al., 2018).

Janus v. AFSCME refers to the Supreme Court decision ridding unions requiring membership (Dunn, 2018).

Local leaders refer to leadership in the local teaching union.

Michigan Education Association refers to the state affiliate for the local union (Michigan Education Association, n.d.).

Michigander refers to a citizen of Michigan (Lessenberry, 2011).

MNIGS refers to a member not in good standing or a member behind in dues (Michigan Education Association, 2019b).

National Education Association refers to the national affiliate for the local union (Michigan Education Association, n.d.).

OBUMs refers to other bargaining unit members or "Opt-outs" (Michigan Education Association, 2019b).

Opt-out refers to all OBUMs who opted out of the union (Michigan Education Association, 2019b).

Right-to-work refers to laws at the state level that governs unions (Dunn, 2018).

Teaching locals refers to the teaching union for a district.

Summary

The purpose of this qualitative, single case study was to determine the best traits of local union leadership in urban school districts in the right-to-work state of Michigan should employ to retain members. These traits were compiled by analyzing the interview

responses of local leaders and members and necessary artifacts to determine themes to answer the research questions. Chapter 2 contains a review of the literature surrounding this leadership problem.

CHAPTER 2: LITERATURE REVIEW

Papay et al., (2017) studied the retention issues in 16 urban school districts and determined that 40% of teachers in urban communities have quit the teaching profession by year 5; this retention problem has reached Michigan. Nnaemeka (2017), in a survey of labor law, ascertained that the question of retaining those teachers in the local teachers' unions, especially under the right-to-work laws in Michigan and the newly imposed Supreme Court ruling of *Janus v. AFSCME*, has also reached all states in the union, including Michigan. Right-to-work in Michigan has expressly limited teachers' unions in their ability to bargain and negotiate. *Janus v. AFSCME* has limited associations from all sectors across the United States because no unit may collect an agency shop fee any longer (Dunn, 2018). The law stipulated that a worker does not have to join the union or pay dues to benefit from the negotiated contract. If the teaching unions are not nationally prepared, as Michigan has had to adapt since the right-to-work legislation has passed, retention numbers will fall (Dunn, 2018).

The focus of this study was one urban public education district's teaching union in Michigan and the attachment to the state and national affiliate. The district, in this case, does have a teacher retention issue and must hire new teachers each year, making the retention of teachers in the union difficult. According to the Michigan Education Association (Michigan Education Association, 2019b), the teaching local in this case study lost over 60 members over the 2018-19 school year due to teachers leaving the district. The retention issue in the community contributed to the retention issue in the union.

Questions remain about the cause of the critical teacher shortage in Michigan (Berry & Shields, 2017). The definition of a teacher shortage is the number of vacancies in the area, the number of candidates applying for those vacancies, class size per teacher, the number of nontraditional and emergency certifications in the district, the number of classrooms filled by special programs like Teach for America, the number of newly certified teachers employed in the area, the number of teacher candidates in the state, the number of certified teachers in a state, the projected number of retirees and attrition, and the percentages of shortages as reported by districts (Berry & Shields, 2017). In a grounded theory study on teacher recruitment and retention, Wronowski (2018) suggested recruitment and retention are two different problems with two other answers. However, retention cannot occur if recruitment is not working. Recruitment becomes less necessary if retention is discussed as a critical factor and then successfully implemented (Wronowski, 2018). Hiring cannot be solved without the discussion of retention, and vice versa (Wronowski, 2018).

McClure and Teitelbaum (2016), in an analysis of a college dean's response to state policy changes, addressed the issues that state lawmakers can present in public education. Laws affect not only the budget and daily operations and learning environment of K-12 students but also the number of college graduates entering education, specifically public schools (McClure & Teitelbaum, 2016). The issues of access to teacher certification, the cost of an individual to certify, the salary of teachers, the health and retirement benefits, and the quality of life and job satisfaction all play a role in recruiting and retaining teachers and the desire of undergraduates to pursue the career (McClure & Teitelbaum, 2016).

The previous factors also pertain to the accessibility of teaching unions to those teachers recruited into the profession. Michigan is a right-to-work state, which means that new teachers and teachers accepting new positions must opt into the association to be a member (Oas et al., 2016). The union in Michigan is the catalyst to protect retirement benefits, health benefits, salary, and other decisive factors in recruiting and retaining teachers both in the profession and in the union (Oas et al., 2016). The declining benefits and salaries of teachers in the state of Michigan, due to policy and law changes and competition from the private sectors, has crippled the teaching workforce in Michigan (Chambers, 2018).

In 2003, over 9,000 graduates received the initial teacher certification from Michigan; in 2018, only 3,000 graduates received this certificate (Chambers, 2018). There is a pattern of a decline in the numbers of teacher candidates produced in Michigan due to legislation. As a result, the ability of the education system in Michigan to attract talent from outside of the state also remains difficult (Oas et al., 2016). In addition to the factors of law and policy, union strength, health, retirement benefits, and issues urban educators face daily, the evaluation processes and leadership styles of building and district administrators play a critical role in retaining teachers.

Retention of Teachers in the Union Local

One reason for the teacher shortage in Michigan is the salary gap between educators and private-sector workers. Public service teachers receive less competitive salaries and benefits packages than those in the private sector (Chambers 2018). Berry and Shields (2017) also suggested districts, especially those like urban districts already suffering shortages, see a decline in enrollment after the recession leaving districts

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scrambling to fill previously unfilled positions and fill positions created by increased enrollment. These situations then lead to overcrowded classrooms, which is a factor in teacher retention and is also indirectly negatively impacted by state law and policy (Wronowski, 2018).

In some states, the attractiveness of entering the teaching profession has been decimated by (a) the lack of state supports for those teachers entering the profession, (b) the lack of respect for the job, (c) the student loan debt required to enter a low-paying profession, (d) the certification cost and renewal process and cost, (e) the working hours required outside of the workday, (f) the stress of teaching students living in trauma, (g) teacher evaluations and the process, (h) poor leadership and ineffective leadership, (i) the lack of mentorship, and (j) the lack of union strength. All these factors contribute to the inability of districts—primarily urban districts—to recruit and retain teachers (Wronowski, 2018). This climate means an inability then of the local, state, and national associations to have an opportunity to recruit and retain those professionals (Berry & Shields, 2017). In addition to the lack of ability to retain teachers, urban districts especially face recruiting the right teacher candidates who have the right experience and training to effectively navigate all the problems that come with teaching in urban areas (Wronowski, 2018). Teacher preparation programs that do not adequately prepare candidates to serve in the districts most in need of service largely contribute to the turnover rate of educators in the first five years of service, which is 8% of the profession nationally each year (Berry & Shields, 2017).

One key indicator of the ability of a district to retain teachers is the teacher maintaining a feeling of support and mentoring among the new teachers and less

experienced teachers (Wronowski, 2018). Two teachers in Wronowski's (2018) study suggested that motivation for teaching helped to maintain the ability to remain in the high-needs district, but also feeling a sense of community and relationship to the students and colleagues played a vital role in retention in an urban district. Berry and Shields (2017) also concluded that support is an essential ingredient in teacher recruitment and retention. However, this study reflected the necessity for the supports to be offered through not only good leadership and practices, including high-quality teacher preparedness but also attributed to support through policy.

Federal and state policy dictates everything about public education from standards, to requirements, to funding, to evaluation and accountability, to employee salary and benefits, union strength, bargaining, and negotiation power (Ferguson, 2018). In 2002, over 77,000 teacher candidates graduated in California, and in 2015, 22,000 teacher candidates graduated (Berry & Shields, 2017). These numbers reflect those in Michigan, proving the existence of the national problem with teacher shortages (Chambers, 2018). Lessenberry (2011), in a Michigan Radio News Story, reported that, since 2004, there are 5,000 fewer certified teachers in classrooms, and that 100,000 Michiganders have current or lapsed teacher certification and who are not currently teaching. All the states in the union are now subject to the Janus ruling, furthering the argument that laws like right-to-work will add to the union membership recruitment and retention problem (Herbert, 2019). The fewer teachers there are on the state and national level, and the fewer teachers joining the local, state, and national associations, the less power these unions yield to positively affect working and learning environments,

furthering the recruitment and retention problems in the public education field (McClure & Teitelbaum, 2016). The issue is cyclical.

Nnaemeka (2017), in a discussion and review of the new Supreme Court and President Trump's administration concerning unions, suggested the only way for labor unions to outlast the presidency is to keep membership numbers healthy and organize those members to lobby for new laws. If the teaching unions are not nationally prepared, as Michigan has had to adjust since the right-to-work legislation has passed, retention will fall. Furthermore, if the teaching unions cannot encourage growth in the profession in general, then the business of public educators can be decimated by policy (Berry & Shields, 2017).

Urban Education

The shortages faced by urban districts outnumber those in more affluent neighborhoods. For example, Ferndale Public Schools in a suburban area of Metro Detroit have had up to 50 candidates for one teaching position. In contrast, districts like Detroit and Flint, urban and underfunded school districts suffer up to 50 unfilled vacancies at a time (Chambers, 2018). Wronowski (2018), in a qualitative study of urban educators, described culture shock as a leading indicator of the inability of urban districts to retain and then retain high-quality educators. The world of urban education is complex and includes attributes that most teacher preparation programs do not prepare candidates for, including but not limited to trauma, poverty, large class sizes, failing infrastructure, race relations, and bias (Wronowski, 20187).

Dodson (2018) studied principal perceptions of the teaching evaluation process, including the Charlotte Danielson model employed by the district used in this study.

Dodson (2018) suggested that the evaluation system, as reviewed by principals, was mostly viewed as unfair given the level that students' test scores factored into the evaluation, not the intent of Danielson, the creator of the model. The Danielson model evaluates teachers on what students are doing and learning, not on what the teacher is doing and teaching. This tool is meant to be used as a growth tool, not an evaluative tool. The principals implementing the evaluation system as required by state law and the district can lead to feelings of conflict between the administrator and the teachers, which the administrator is powerless to fix (Dodson, 2018). These feelings of strife and conflict cycles can add to the lack of retention of teachers in individual districts.

Coinciding with the administrators being powerless in some states like Michigan, the law prevents teachers from being able to bargain rules on the evaluation process or have any power to appeal the process (Oas et al., 2016). The lack of autonomy and personal control over their teaching career can add to the frustrations of union members and cause them to either never opt into the union or opt-out if the member feels unfairly targeted by the evaluation process. The evaluation process may factor in the districts' inability to retain teachers and affect the local association's ability to keep members in the teaching union and the profession (Dodson, 2018).

Teaching Unions

Goldhaber et al. (2016) studied the impact of collective bargaining agreements on teacher placement and mobility. They suggested the ability to negotiate contracts dictates the strength of the contract for a given district. The power of the agreement affects working conditions, which affects teacher retainment (Marianno & Strunk, 2018). One of the fundamental goals of the local, state, and national association, in this case, is to

advocate for high-quality working conditions, which translates into high-quality learning conditions.

Given that this is a goal of the state union, this goal is transferred to the local association. When the purposes of the association align with the goals of the community, the community is more likely to support the educators, which is a critical factor in teacher retention (Dodson, 2018). Berry and Shields (2017) also recommended that teachers have access to good preparation programs readying these candidates for work in an urban environment. In addition to proper preparedness, teacher retention relied heavily on increased compensation and packages to match or compete with the private sector and enhanced working and learning conditions (Berry & Shields, 2017). These conditions include but are not limited to access to appropriate materials and small class sizes (Berry & Shields, 2017). Also, respecting the teachers as educators, leaders, and professionals whose opinions matter are important determinants (Berry & Shields, 2017). These are the aims of teaching unions (Antonucci, 2014).

In a study of the decline of union membership among teachers, Antonucci (2014) discovered that teachers joining the union had declined 50% since 1983. The decrease in teacher retention has caused a decline in the number of teachers retained in the association. The Supreme Court ruling in *Janus v. AFSCME* and state by state right-to-work laws (Nnaemeka, 2017) have also decimated union numbers. If teachers are not entering the profession, then those spots remain unfillable in the union. If those teaching positions are not filled by certified teachers, but rather by substitutes or special programs like Teach for America, those workers are not eligible to join the union (Tang, 2019). Therefore, the spots remain unfilled in the union and thereby lessen the strength of the

association. As teacher union membership declines, teacher retention declines in both the profession and the union (Antonucci, 2014). The problems become reliant on one another. The Michigan Education Association (Michigan Education Association, 2019b) has experienced a decline in membership since 2012 due to right-to-work. Michigan has been suffering a teaching shortage since 2012 (Michigan Education Association, 2019b).

Found in Antonucci's study (2014) was the national union's drive to become the agent of change in the public education system, including retaining members and retaining teachers. However, the association cannot be a power for educational reform if membership continues to decline in right-to-work states, and because of the Supreme Court decision (Antonucci, 2014). The national association was down 9% of its membership in 2015 before the Janus decision; further, membership losses are likely to occur if the past legislation imposition is any indication in those states affected by right-to-work (Antonucci, 2014).

Janus v. AFSCME

Janus took the case of agency shop fees to the Supreme Court. In June 2018, the Supreme Court of the United States sided with Janus and declared agency fees and automatic union membership as federally illegal (Herbert, 2019). Herbert (2019) reviewed the Supreme Court decision, which declared that agency fees are fundamentally against the First Amendment to the Constitution; agency fees stifle free speech. In another review of the case decision, Trudeau (2019) asserted that the illegality of agency fees would undermine 40 years of labor law strengthening unions, as agency fees were intended to strengthen unions and the organization's organizing and lobbying power.

Freedom of speech in this context can be viewed both on an individual level and a collective level. The strength of union membership comes from the numbers of people in the union and the dues the members pay. When a person can receive all the contractual benefits of the union membership without paying the association, diminished is the strength and bargaining power of the union. Then stifled is the freedom to collectively speak to protect the speech, liberty, and rights of the individual. Tokaji (2019) argued the decision in the Janus case would further the systemic inequities in our labor force by limiting the workforce's ability to bargain fair and equitable wages and working conditions.

Right-to-Work

Michigan currently holds the highest union membership numbers in a right-to-work state, 16% of the workforce (Kaminski, 2015). Michigan has a long history of unionizing as the birthplace of Jimmy Hoffa and the United Auto Workers. The National Education Association (n.d.) is the largest union in the country. The teaching unions in Michigan are well represented in the National Education Association. Kaminski (2015) researched the history of right-to-work in Michigan and determined the right-to-work legislation push and appeal directly coincided with the era of big-money political donations. The legislature passed right-to-work in Michigan because of the lobbying efforts of big money donors such as Dick and Betsy DeVos (Kaminski, 2015).

Some studies offered that right-to-work laws may help to increase manufacturing production and may encourage companies to open businesses in right-to-work states so that the businesses do not have to contend with unions. As in the Janus opinions by the Supreme Court, some legal scholars argued for the protection of freedom of speech for

individual workers in states where right-to-work is employed. While not directly

correlated to the passing of the legislation in 2012, since the passing of the law, Michigan

has experienced a teaching shortage and a drop in teaching candidates in Michigan

universities. According to a report published by the Citizen's Research Council of

Michigan (2019), enrollment in teaching preparation programs in Michigan is down 66%

since 2011, and 100,000 qualified teachers in the state are not using their certification.

The Citizens Research Council of Michigan (2019) also reported that Michigan's school

districts are having to hire 16% of positions each year, where teachers are leaving the

profession or retiring.

Transformational Leadership

The inability of leaders to transform schools in an urban district because factors

that teachers face including but not limited to climate and culture, student behavior,

policy, funding, and class size can lead to burnout and turnover of the teaching staff

directly negatively impacts teacher retention (Wronowski, 2018). The same applies to

teachers working in these urban districts, and contending with right-to-work laws can

cause burnout in union members (Wronowski, 2018). McKinney et al. (2015) studied the

traits of principals in the National Blue Ribbons schools. They suggested principals who

inspire through a shared vision can transform climate and culture to one of success and

retention. Transformational leaders can change people while also reshaping an

organization for the better (McKinney et al., 2015). These are the leaders that inspire

employees to strive for excellence through growth, autonomy, and collaboration

(McKinney et al., 2015). In a study of the relationship between employee satisfaction and

retention, Shabane et al. (2017) offered transformational leadership as a critical

leadership approach to build relationships with employees, increasing employee satisfaction, and leading to higher retention rates of employees. Given that transformational leadership is an empowering form of leadership, school districts and local associations can develop leaders capable of portraying these traits to affect the retention of teachers and union members positively.

Ethics and Morals of Transformational Leaders

Transformational leaders inspire through vision, which requires some ethical and moral principles because staff must trust a leader to believe in the shared vision (McKinney et al., 2015). Simola (2016) studied the existence of moral courage in organizations and suggested (a) the practice of leading with moral courage and (b) embedding the practice of moral courage in organizations. Rivera-McCutchen (2014) determined social justice and morality were necessary traits of successful leaders in urban districts. Ethical courage separates into two paradigms—conduct and character (Rivera-McCutchen, 2014)—and is an essential attribute of transformational leaders (Hoch et al., 2018).

Simola (2016) offered findings to apply to the leadership practices in an urban school district and the teaching unions that coincide with those districts. Combating state policies and legislation, especially those on teacher evaluation and working and learning conditions, from the ground also requires moral and ethical courage of the school leaders and union leaders in urban districts (Robertson-Kraft & Zhang, 2016). Teaching unions can combat these laws and fight back is by organizing around lawmakers forcing a change in right-to-work laws.

The Authenticity of Transformational Leaders

Fox et al. (2015), in a study on authentic leadership in principals, discovered that principals exhibiting authentic leadership were more likely to be trusted by teachers, and therefore produced better working and learning environments in the school building. Authentic leaders present the exact representation of themselves so that subordinates know what to expect from a leader in any given situation (Fox et al., 2015). Trust is an attribute which is an indicator of retention when heightened by authenticity. Principals exhibiting authentic behaviors are more likely to retain teachers; therefore, union leaders who also exhibit genuine behavior are more likely to keep members (Fox et al., 2015).

Mentoring With Transformational Leadership

One key indicator of the ability of a district to retain teachers is the teacher maintaining a feeling of support and mentoring (Wronowski, 2018). Two teachers in Wronowski's (2018) study suggested that motivation for teaching helped maintain the ability to remain in the high-needs district, but feeling a sense of community and relationship to the students and colleagues also played a vital role in retention in an urban district. Berry and Shields (2017) also concluded that support is an essential ingredient in teacher retention; however, this study reflects the necessity for the supports to be through not only good leadership and practices, including high-quality teachers' preparedness, but also attributed to support through policy.

Cultural Competence and Transformational Leaders

Leaders should incorporate culturally competent and responsive leadership skills into their transformational leadership qualities. In a framework for female leaders, Esser et al. (2018) stipulated the following should occur for successful female leadership: empathy and honesty, as demonstrated in an ethical approach; competence, and

knowledge, as shown in the authentic leadership approach, and communication and adaptability, as shown in the transformational approach. In addition to the framework (Esser et al., 2018), culturally competent and responsive, female educational leaders will listen to and collaborate with all stakeholders.

Santamaría and Santamaría (2016) devised seven critical characteristics for the culturally competent leader: (a) engage all stakeholders in conversations, the transformational approach; (b) build trusting relationships with all stakeholders, authentic approach; (c) be seen leading by example, transformational approach; (d) collaborate with all stakeholders, transformational approach; (e) create and prioritize shared goals, transformational approach; (f) be self-aware of privilege and marginalization, moral leadership; and (g) be a present and active servant to the community, ethical leadership.

<div align="center">**Summary**</div>

A gap in the literature exists due to right-to-work and the Supreme Court decision of *Janus v. AFSCME*. All states are now contending with some form of union-busting though not all of them have adhered to strict right-to-work laws (Antonucci, 2014). Unions, especially teaching unions, are struggling to retain members not only because of these laws and policies but also because of the teaching shortage across the country (Antonucci, 2014). The lack of certified teachers retained in school districts, especially in urban areas, is directly influencing the teaching unions' ability to maintain and keep members. Tapia and Turner (2018) suggested young workers in labor unions will be the key to organizing and the survival of the association if prompted to involvement by the local leaders. One distinct way to address this problem and the gaps in the literature is to

study and examine successful organizations that are flourishing through these issues (Tapia & Turner, 2018).

The lack of appropriately trained teacher candidates and the interest of college graduates pursuing K-12 education is a serious issue facing the United States (Chambers, 2018). Weixler et al. (2018) determined that with the decline of teaching candidates comes the decline of recruiting and retaining the top teaching candidates or teaching candidates in general. Eisenberg-Guyot and Hagopian (2018) suggested the lack of teaching candidates entering the profession means a lack of union members in the teaching unions. When considering widespread right-to-work laws and the newly decided Supreme Court ruling of *Janus v. AFSCME*, educational leaders wanting to contribute to recruiting and retention of teachers both in the profession and in the union must be willing to adjust leadership styles and roles to best support an environment of retention (Kraft et al., 2016).

Donaldson (2013) noted public policy and relationships play a vital role in a district's ability to retain teachers. Therefore, the next wave of instructional and educational leaders operating under the new public policy standards must adapt. They must lead with an approach and style indicative of navigating the complexities of all of these issues. These issues contribute to a lack of interest in the profession and a lack of ability to retain teachers (Kraft et al., 2016). Many teachers leave within the first five years of the career because of a lack of fostering relationships and mentorships, including during the internship process (Roegman et al., 2016).

Transformational leaders foster growth and collaboration (Shabane et al., 2017). If an authentic leader presents authenticity through a transformation while also leading

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from a place of morality, then the leader will foster relationships that support a climate of retention. If these leaders work with union leaders to recruit and retain members for the best interest of the working and learning environment, then both organizations can flourish and grow (Kraft et al., 2016). The collaboration is healthy for the education of the children in the district and the health and professional growth of the classroom teachers and staff (Shabane et al., 2017).

The issue of social justice also plays a role in the retention of teachers in urban districts. Without adequate leadership to navigate the complexities of the plights of urban education, including moral and socially just imperatives, retention of teachers becomes a difficult task (Rivera-McCutchen, 2014). A transformational leader with a moral compass and authentic purpose can combat the complexities of urban education while also creating an environment where teachers want to remain and professionally grow. Furthermore, a transformational leader can seek to develop lasting relationships with the teaching unions to answer the recruitment and retention questions (Shabane et al., 2017). The idea of the district leaders working in conjunction with the union leaders to create environments suitable to retaining teachers in urban districts is one that requires a moral imperative to do what is socially just and right for the district and the community, and the staff (Simola, 2016).

Introduced in Chapter 3 was the single case study used to address the research question and the gaps in the literature as described, including the case study design, the interview questions, and the data analysis. The research design, instruments, participants, data analysis, and limitations were described. Chapter 3 served as the bridge to Chapter 4

and Chapter 5, where the data were analyzed, conclusions were drawn, and

recommendations were made.

CHAPTER 3: METHODOLOGY

The purpose of this qualitative single case study was to discover which leadership traits contribute to higher teacher retention in the union since right-to-work laws surfaced in Michigan. The retention of teachers in the union in Michigan has declined since the adoption of right-to-work in 2012. Mohajan (2018) suggested using a qualitative approach when studying a topic in a natural setting. The chosen qualitative design of a single case study best addressed the purpose of this study. The purpose of the study was to gather information from a mix of qualitative tools. A purposive sample of union leaders and members answered semi-structured interview questions. I also included a review of the necessary artifacts (Mohajan, 2018). I designed the study to answer the following questions:

> Q1: How has right-to-work and the Supreme Court decision in *Janus v. AFSCME* affected teachers' views of the union leadership?

> Q2: How does the local leadership believe transformational leadership traits and behaviors contribute to membership retention?

> Q3: How do the local members believe transformational leadership traits and behaviors contribute to member retention?

Explained in this chapter are the research method, research design, research instruments, research participants, data analysis methods, and limitations of this proposed single case study.

Research Method

Levitt et al. (2018) reviewed research methods and determined qualitative research methodology and design is appropriate when examining the development of a

social construct or how people relate to one another. Morgan (2018) reviewed the importance of selecting the correct method for specific studies and suggested some studies are suited to a mixed-methods approach while others are not well suited. Since this study was created to code and analyze the views of members and leaders, a qualitative approach to methodology works best (Morgan 2018).

The case in this study was one local teaching association in an urban district in Michigan, a right-to-work state. I interviewed five critical leaders in the Local Association and a purposive sample of 11 Local Association dues-paying members. These interview questions incorporated the transformational leadership theory. Also reviewed were necessary artifacts.

In a study of qualitative methods used in educational psychology, Newman and Clare (2016) suggested prearranged interviews that are method driven are incredibly trustworthy and reliable. The data gathered from the interviews was the most critical data set because this case study is reliant on participant perception. Reviewed artifacts included archived data such as membership numbers from month-to-month and membership numbers from the beginning of the year to the end of the year. Membership numbers from across the state will also be determined as an artifact since the goal of the study was to reveal leadership traits that promote successful membership retention. Other essential artifacts included information from Local Association key leaders on member events.

Research Design

Creswell et al. (2007) analyzed different types of qualitative designs. They settled on five approaches as key to qualitative research, including grounded theory,

phenomenology, narrative inquiry, case study, and participatory action research. Grounded theory was not appropriate for this proposed study because I sought to understand the views and opinions of members and leaders through the process of semi-structured interviews. The grounded theory requires a researcher to perform an immersive study (Creswell et al., 2007). Phenomenological research or narrative research would not address the purpose of or the answer to the research questions stated in the study because I intended to analyze the views of the members and leaders of one teaching local in an urban district in Michigan. Therefore, the analysis was not of an event or situation, but rather the response of the individuals to the current political and legal situation (Creswell et al., 2007).

This study was a single case study. Yin (2015) studied the generalizability of case studies. To align with the validity of case studies, Yin (2015) concluded that the sample size should be appropriate. The case itself should be numerically manageable, and the research should be grounded in a general theory. Since this study included a single case study with a purposive sample grounded with interview questions encompassed in transformational leadership theory, the method and design were appropriate to address the research questions (Yin, 2015).

Data in this single case study were semi-structured interviews and necessary artifacts. The interviews were open-ended and included questions about leadership in the organization. Qualitative documents, which may consist of membership documents for the Michigan Education Association for the Local Association and member engagement emails, were analyzed in conjunction with the interview answers. Qualitative materials

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comprised of photographs, audio, social media text, and the organization website were also analyzed.

McCarley et al. (2016) performed a multi-level analysis of transformational leadership traits in educational leaders utilizing the Multifactor Leadership Questionnaire (MLQ 5x Short). I based the interview questions on the MLQ 5x Short addressing transformational leadership (McCarley et al., 2016). I also created a semi-structured interview to answer the proposed research questions for the entire study.

To ensure the validity of the proposed semi-structured interview, I had the questions reviewed by the dissertation chair and dissertation committee. Suggestions and feedback were incorporated into the semi-structured interview questions. Newman and Clare (2016) suggested researchers get expert input and select the appropriate population and sample size to ensure the validity of the instruments and data collection in qualitative research. The research questions can be found in Appendix A.

Participants

Dodgson (2018) suggested that in a qualitative study, the sample must fit the methodology. The population, in this case, was the Local Association. The sample selected from this population was purposive. Yin (2015) recommended that the chosen sample be appropriate to the size of the case and the impact of the proposed research questions. Five local leaders were interviewed, and 11 members of the organization were interviewed. Creswell (2014) stated that study design plays a role in the size of the sample. Since there are roughly 800 members in the local association, and since this proposed study is a case study, a purposive selection of five leaders and 11 members

allowed for a manageable set of data that is diverse and representative (Yin, 2015). All leaders and members are dues-paying, certified educational professionals.

Barratt et al. (2015), in a review of sampling and validity in research studies, determined purposive samples are valid if researchers consider the hidden populations among samples. Barratt et al. (2015) suggested a researcher use purposive sampling when they have knowledge and an understanding of the studied topic. I am a member of the organization and have served in leadership roles; therefore, I understand the problem and organization personally. The Local Association, through elections and appointments, has a remarkably diverse leadership team inherently consisting of hidden populations. The local leaders and members selected for this proposed study range in age from 26–55 years old. The local leaders and members selected for this proposed study also come from different backgrounds, ethnicities, races, genders, and career placements, and vary from newer educators to highly experienced educators with varying levels of degree attainment. I informally received permission to perform the study and reached informal agreements from participants before the research to ensure cultural diversity.

The naming of the Local Association protected the anonymity of the organization and the school district. All leaders who participated in the study were named "Leader 1," and so on. All members who participated were known as "Member 1," and so forth. The anonymity of the district, organization, leaders, and members was integral to the factual finding of this study. All participants signed a consent form (see Appendix B).

The desired format for both the original interview and any necessary follow-up interviews was face-to-dace; however, that was not possible due to COVID-19 and the Centers for Disease Control and Prevention's recommendation of social distancing. I

conducted all interviews using Zoom. Governor Gretchen Whitmer of Michigan has enacted executive orders canceling in-person K-12 education for the year. The governor has passed social distancing "stay safe, stay home" orders. The orders have been extended through June 18, 2020, and could be extended further. Given the COVID-19 Pandemic, face-to-face interviews were not possible.

Data Analysis Methods

I hand-coded the data gathered from interviews and artifacts for this single case study. In a review of coding and analysis, Williams and Moser (2019) referred to the practice of coding and developing themes as an art form in qualitative research, meaning the themes must be coded for accuracy and integrity. Themes were coded into a spreadsheet from the proposed interview data (Creswell, 2014). Themes were grounded in transformational leadership since the questions developed for the interviews were derived from the MLQ 5x Short (Yin, 2015). Creswell (2014) listed several steps to completing data collection and analysis in qualitative research, including organizing the data for analysis, read through the data, code the data, generate themes, convey the findings, and interpret the data.

I employed three stages of nonlinear coding to interpret data: open coding, axial coding, and selective coding (see Figure 1), which were part of a cyclical process leading to a construction of meaning to answer the proposed research questions (Williams & Moser, 2019). The first step (see Figure 2) was to form themes based on concepts and expressions (Williams & Moser, 2019). The second step was to organize the coded information into themes (Williams & Moser, 2019). The third and final step of coding was to interpret the coded themes to find the central theme and underlying themes to

answer the research questions (Williams & Moser, 2019). The collected and stored data remained encrypted on a personal computer and a private flash drive. The data were kept until the dissertation was approved and defended. All research and data will be destroyed upon the completion of the doctoral program.

Reliability and generalizability are essential for research and data analysis (Creswell, 2014). Morse (2015), in a review of rigor in qualitative studies, concluded that the strength of research and qualitative analysis is dependent upon developing a reliable coding system, adding detailed description, admitting to researcher bias, and applying a robust data gathering process. Creswell (2014) lists these validity strategies as triangulation, member checking, detailed description, clarifying bias, and peer debriefing. I employed a reliable coding method from the nonlinear coding process, applied analysis rich in description, and admitted to bias (Morse, 2015).

To mitigate researcher bias, I used bracketing. In a review of bracketing as a tool in interviewing research, Sorsa et al. (2015) recommended using bracketing to openly discuss bias and limitations with participants before the interview session begins. The conversation before the interviews was noted in the data collection and analysis located in Appendix C. I also kept notes of all potential biases that arose during interviews and shared the noted bias in the data collection and analysis in Chapters 4 and 5 and Appendix D (Sorsa et al., 2015).

Figure 1

The Cyclical Process of Coding
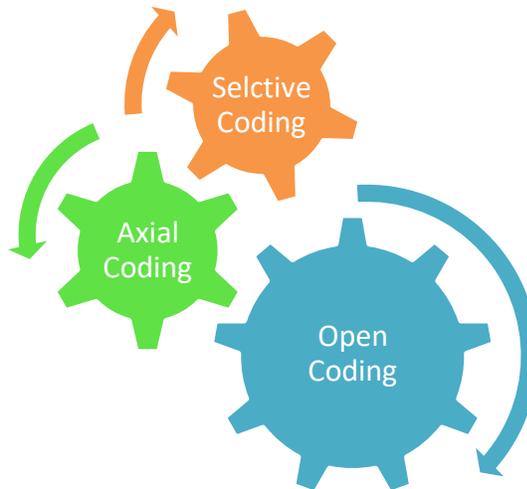
Note. When using this form of coding, the researcher views all three levels of coding as a cyclical process (Williams & Moser, 2019).

Figure 2

Theory Development From Coding

Cyclical Process	Open Coding, Axial Coding, Selective Coding	Developed from Coding	Theory Development	Transformational Leadership	Connection to Leadership Traits
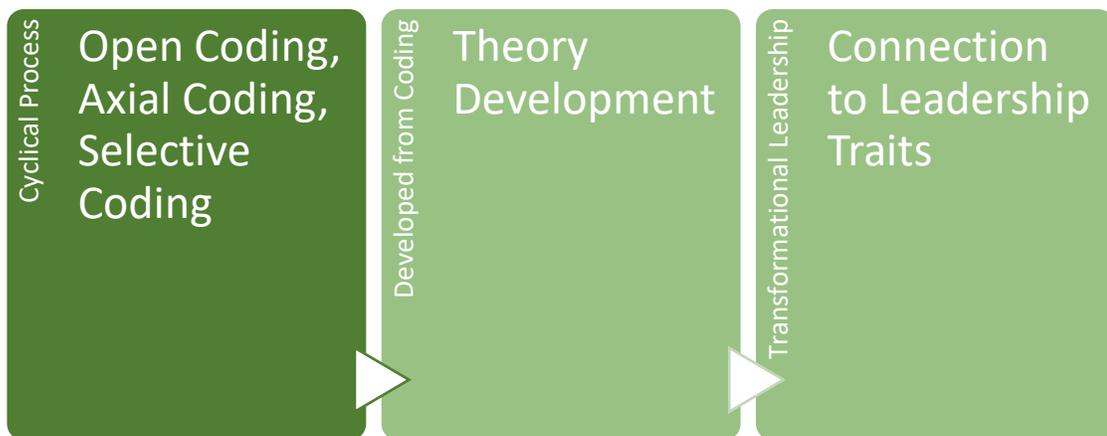
Note. Theory development relies on a robust, cyclical coding system (Williams & Moser, 2019).

Limitations

This is a case study of one organization in one state. State laws affect right-to-work standards, so while the whole country is subject to *Janus v. AFSCME* Supreme Court decision, not all states are right-to-work. Also, this case focused on a progressive,

organized local association in an urban district, which does not fit a predetermined uniform structure. With the current political climate and the climate and culture of the region, teachers may have been afraid to participate in this study.

I am a dues-paying member of the organization. I have also served as a professional development chair, delegate, vice president, and association representative for the local association. I resigned from the positions to remove some limitations from the project. I currently serve as an alternate association representative.

Delimitations

Since this local teaching association is in an urban district, there is a unique subset of issues occurring that may influence union retention and leadership traits. For example, teacher turnover is higher in urban districts. Hence, the need to retain members is a top priority to the Local Association and may not be a high priority to other teaching locals where turnover is not as high. This study took place over part of the school year. Many situations can change from year to year, which could also impact the findings. Therefore, the findings and results of this study may not necessarily generalize to other subjects, locations, or future periods.

Summary

The purpose of this qualitative single case study is to determine the best traits of local association leadership in urban school districts in the right-to-work state of Michigan to retain members. By analyzing the semi-structured interview responses of local leaders and members and necessary artifacts, I determined themes to answer the research questions. The study data were hand-coded, organized into themes, analyzed,

and applied to address the research questions. Chapter 4 presents the findings of the proposed study.

CHAPTER 4: FINDINGS

The purpose of this qualitative single case study was to identify which leadership traits contribute to higher teacher retention in the union since the start of right-to-work laws in the State of Michigan. Retention of members in education unions in Michigan has declined over the past few years because of state policy, including right-to-work. The federal government and the Supreme Court have upheld these policies as legal. The national government policy and the current push for states adopting right-to-work laws result in unions suffer membership loss. Before *Janus v. AFSCME*, teachers had to belong to the union, so there was no retention problem unless the community has a retention problem. These policies are the catalyst for the retention issue with the union. The following questions guided the research of the study:

Q1: How has right-to-work and the Supreme Court decision in *Janus v. AFSCME* affected teachers' views of the union leadership?

Q2: How does the local leadership believe transformational leadership traits and behaviors contribute to membership retention?

Q3: How do the local members believe transformational leadership traits and behaviors contribute to member retention?

The case in this study was one local teaching union in an urban district in Michigan, a right-to-work state. Both the Local Association and the State Association signed release forms so members could participate. Five critical leaders in the Local Association and a purposive sample of 11 Local Association dues-paying members answered semi-structured interview questions. These interview questions incorporated the transformational leadership theory. Reviewed artifacts included archived data such as

membership numbers from month-to-month and membership numbers from the

beginning of the year to the end of the year. Membership numbers from across the state

will also be determined as an artifact since the goal of the study was to reveal leadership

traits that promote successful membership retention. Other essential artifacts included

information from the Local Association's critical leaders on member events.

The naming of the Local Association protected the anonymity of the organization

and the school district. All leaders who participated in the study were named "Leader 1,"

and so on. All members who participated were known as "Member 1," and so forth. The

anonymity of the district, Local Association, leaders, and members was integral to the

findings of this study. I hand-coded the data from the transcribed interviews, membership

documents, and member engagement correspondence and then employed three stages of

nonlinear coding to interpret data: open coding, axial coding, and selective coding. I used

a reliable coding method from the nonlinear coding process, applied analysis rich in

description, and admitted to bias through bracketing.

Chapter 4 is organized into themes of five leadership traits coded from the

participant interviews and artifacts. The leadership traits coded as themes are (a) Ethical

and Moral, (b) Inspirational and Visionary, (c) Trusting and Collaborative, (d)

Empowering and Encouraging, and (e) Open and Honest. These themes of

transformational traits were built from other transformational leadership studies and

leadership descriptions and applied to the participant interviews coded into open, axial,

and selective codes. Soo (2017) studied the mediating effects of transformational

leadership of an organization and discovered leadership traits supporting transformation

such as empowerment, relationship building, and collaboration were integral to the

longevity of the organization. Researchers, such as Northouse (2016), offered other transformational traits, like influence, inspiration, moral and ethical behavior, and considering the individuals or subordinates. Based on this theoretical foundation, I applied the characteristics of transformational leaders to the open, axial, and selective codes to form the themes in Chapter 4.

Found in these themes of transformational leadership traits were critical ideas (i.e., selective codes) built from axial codes to support the theme creation, including (a) The Organization, (b) Subjects of Bargaining, (c) Outside Factors, (d) Relationships, (e) Belonging, (f) Collective Power, (g) Mentoring, (h) Training, and (i) Encouragement. I also noted one selective code reappeared far more than any other selective codes in all interviews. The most discussed selective code was "Outside Factors."

Presentation of Findings

I recruited participants by asking on the secret Facebook page to ensure a diverse group of participants. I also recruited participants through text messages. I sent a text to all due paying members located in my contact list to ensure broad participation. I secured enough members from a diverse pool of participants to complete the research. All 16 participants, five leaders, and 11 members answered questions via Zoom due to the COVID-19 closure and executive orders enacted in Michigan. These orders are still in effect as of July 2020.

All 16 participants completed the semi-structured interviews in one session using Zoom. I supplied each participant with an email requesting they sit for the interview (see Appendix E). Attached to the invitation was the participant consent form. Each

participant signed the form and returned a signed copy before the interview. Both the participant and I have a signed copy of the consent form.

At the start of the interview, I read a statement of personal bias for the bracketing technique (see Appendix C). To review the bracketed information from the transcribed interviews, see Appendix D. I also discussed the consent information, reiterating the anonymity piece of the study. The participants were asked to share any questions or concerns before participation in the interview. All 16 participants stated they had no issues or concerns and were clear on the purpose of the study. The semi-structured interview included 12 questions (see Appendix A). Embedded in the items was the transformational leadership theory. I recorded field notes during the meetings, especially to note areas of bias for bracketing. I asked most participants additional or clarifying questions if the interview led to other issues.

Interviews were transcribed into Microsoft Word. The documents were encrypted and saved to a folder. After I completed the transcription, the report was saved to a password-protected USB and deleted from the computer. I then reviewed each transcription for accuracy. Once the transcriptions were completed, I listened to the audio recording one or two additional times while also reading through the transcription to begin a code development. I employed a reliable coding method from the nonlinear coding process (see Figure 1), applied analysis rich in description, and admitted to bias through bracketing (Morse, 2015). I took handwritten notes to begin the organizational process of ideas as ideas relate to open coding. Once the open codes were discovered, I then organized the transcript language to demonstrate open codes, axial codes, and

selective codes (see Figure 2). These themes were then applied to transformational

leadership traits. The traits were determined from the transcribed interviews.

The axial codes were organized into clusters to form the selective codes. The

selective codes are essential ideas, factors, and actions that lead to effective retention of

members. Transformation leadership traits that were present in all interviews were then

applied to the selective codes forming the themes of the research. Leadership actions

demonstrating these themes developed from the interviews as examples of effective

leadership from the organizational leaders and members (see Table 1).

All 16 of the interviews contain a detailed description of transformational

leadership traits, outlined in Chapter 4. In addition to the detailed descriptions, all 16

participants gave examples of how these traits applied to the leader and organizational

action (see Table 2).

Ethical and Moral

A key trait of leadership that developed throughout each interview were the

virtues of ethical and moral leadership. The participants all noted that the leadership of

the Local Association anecdotally appears to do what is right for the greater good to

ensure that the students have the best learning conditions possible. Member 3 suggested

the benefits of bargaining good working conditions, a fair salary, and appropriate benefits

for time worked are morally essential to creating the best educators to serve students in

the best ways the educators' know-how.

Table 1

Theory Development and Meaning

Axial Codes	Selective Codes	Connection to Leadership Traits (Theme)	Leadership in Action Example
State Officer Salary State Employee Salary Organizational Change Public Education Values Procedure and Process Legacy Strength Power	The Organization	Ethical and Moral Inspirational and Visionary	The leadership demonstrates the values of public education and reflects those values in the organization and action.
Learning Conditions Working Conditions Salary and Benefit Paid for Work Important Issues Equity	Subjects of Bargaining	Inspirational and Visionary Trusting and Collaborative Empowering and Encouraging	During bargaining, leadership advocates for safety, fair wages, and working conditions that support student learning.
Evaluations Federal Policy State Policy Funding Public Perception Building Level Leadership District Level Leadership Retaliation and Retribution Societal Roles Student Discipline Violence Systemic Racism Tenure Equity College Enrollment Turnover	Outside Factors	Open and Honest Ethical and Moral Inspirational and Visionary	Despite the outside factors, of which the leadership has no control, the leader inspires members to remain in the union through leadership action and passion.
Greater Good Prevails All Members Matter Committees Collaboration Communication Experience First Conversation	Relationships, Belonging, and Collective Power	Trusting and Collaborative Open and Honest	The leadership is always asking, "how do these actions benefit the whole or the good of the order?"
Grooming New Leaders Accepting Culture Encouraging Culture Guiding Stand Up Strong Voice Collective Voice	Mentoring, Training, and Encouragement	Empowering and Encouraging Open and Honest Inspirational and Visionary	The leadership is continually seeking out new leaders and encouraging all of those that want an opportunity while respecting diversity and inclusivity.

Note. These codes were developed from the transcripts of the participant interviews. The

examples also developed from repetition in the interviews.

Table 2

Leadership Traits in Action

Trait	Description	Example 1	Example 2
Ethical and Moral	The leaders consistently share realistic views with the membership and continually value doing the right thing every time.	The leader will follow through with the grievance process, including arbitration.	The leader wants what is right for members, not what is right for themselves.
Open and Honest	The leader incorporates active listening skills and displays appropriate body language. The leader is a clear, concise, confident, expert communicator.	The leader communicates membership gains and membership losses openly with the entire membership.	The leader openly admits to failures and will change behavior after conferring with the membership.
Inspirational and Visionary	The leader lives the values and mission of the organization.	The leader is enthusiastic about organizing and continuing to retain members through member outreach programs.	The leader organizes for social justice causes to better both the working and learning environment.
Trusting and Collaborative	The leader is culturally competent and respectful of all members from diverse backgrounds.	The leader continually seeks input from all member stakeholders.	The leader understands that cultural competence is an ongoing and fluid lifelong learning process
Empowering and Encouraging	The leader is encouraging members to seek leadership roles and opportunities. The leader helps to mold and guide the next generation of leadership.	The leader seeks out members from diverse backgrounds to encourage leadership better to serve all the members of the organization	The leader encourages young and new members to share their voices, share their skills, and share their passions.

Note. These traits were selected from the participant interviews. The qualities in actions stem from participant anecdotes.

Leader 1 explained their views on how sometimes the morals and values of the group can supersede personal morals and values. Member 3 suggested, at the forefront of the bargaining process is what is right and fair for the working conditions is appropriate

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for learning conditions. Leader 1 indicated that group values must guide the leadership of the organization. Individual values, like those taught and affirmed in the religious context, cannot overcome the group value and the fact that the leader must follow public education morals. "I think that the morals and ethics of the group must lead our decisions, not my morals and ethics. Sometimes my morals and ethics are at odds with what the group wants," stated Leader 1.

Leader 1 continued to discuss how religious obligations can often be challenging to contend with when teaching public school because religious guidance cannot enter the practice of teaching or educating.

Politically, sometimes, I believe certain things, and because I'm a public educator, I can't let people know I believe those things. I cannot think of a good example. Public education, the way that we believe can't enter into our decisions; I guess because it is not about me; it is about public education and how do we educate everybody without those things interfering.

The political beliefs of individuals can also be at odds with the publication education values and ethics of respecting all students, no matter the student's life choices. Public educators must contend with and apply public education values; therefore, educational leaders must also use them.

The participants agreed that an ethical and moral lens guides the local; however, 11 participants questioned the ethics and morals of the state leadership. Member 9 mentioned their concern with debt collection to strong-arm members not in good standing into paying their dues and back dues. Member 9 questioned the moral courage of the State Association's leadership using this tactic when the salaries of State Officers and

employees are incredibly high. The highest-paid employee at the State Association makes $252,456, including salary, stipends, and benefits (Michigan Education Association, 2019a). The highest-paid elected officer of the State Organization makes $159,878, including salary, stipends, and benefits (Michigan Education Association, 2019a). The average teaching salary in Michigan is $62,287, with a starting salary of $36,234 (Long, 2019). The average teacher in Michigan pays $102 per month for 10 out of 12 months for combined dues owed to the local, the state, and the national associations. The current membership percentage of the local in this case study is 83% or 678 members in good standing out of a possible 817 members (Michigan Education Association, 2019b), which is higher than organizations in similar circumstances and with a similar community and student demographics (see Table 3).

Table 3

Membership Numbers of Similar Local Associations

Local Association	Total Population	% In Good Standing	In Good Standing #
1	1,119	58%	649
2	797	76%	606
3	413	80%	331

Note. These numbers come from the most recent membership report compiled by the State Association (Michigan Education Association, 2019b).

When discussing the moral and ethical obligations of organizational leaders, Member 9 offered that they are "proud of the moral and ethical values and guidance of the local leaders with some concerns about state leaders." They said:

I found out the salaries of the officers and employees of the State Organization. I called the state treasure one night. So, I called them up, and he proceeds to tell

me, you know, "I'm telling him you're making like 330 grand here." And I said, "You got this collection agency calling me." Then the guy had the nerve to say, "Well, you know, I got three houses I gotta pay for."

Member 9 stated, "The biggest issue is the administrative costs, and that's it's not going to the local folks . . . I'll be honest with you, I've looked into getting out because of that model." Other participants also mentioned the salary of state-level officers and employees as an essential reason to consider leaving the union.

All participants agreed the moral and ethical obligation of educators is first; they must ensure students have the best learning conditions possible. According to all participants, the union, in this case, is solely responsible for ensuring that students are given what they need. The consensus of interviewees was that both the students and the members would be far worse off if not for the strength of the Local Association. Participants also acknowledge membership loss since right-to-work became policy as a direct threat to the strength and power of the Local Association and the ability of the local to fight for moral and ethical obligations, including those obligations to students.

Leader 1 summed up the moral and ethical values of the leadership of both the Local and State Associations:

Ethically, everything we do goes to working conditions and doing what is best for kids. Equal pay for work, or pay for work, or more reasonable working conditions for teachers. People should be treated fairly and equitably. Kids should get the best that we can supply them with. All of this is tied together.

Working conditions are learning conditions, and so, bargaining those conditions is the moral obligation of the Local Association.

Another moral and ethical issue mentioned by Member 9 and observed throughout other participant interviews in the role that people play in society:

> I've always been way the minority as a male. I mean, there are not many male staff members in education. I am usually the only male or one of very few on the staff. I think there's a gender issue to this in a sense.

Member 9 believes his label as "male" influences his ability to build relationships with coworkers. According to the member, the lens can affect the way women view him, the way his school leadership sees him, the way union leadership sees him, and the expectations placed on him by these subgroups. Member 9 believes that "societal gender roles and stereotypes can affect the balance of working relationships and that good leaders guide people to be culturally competent."

Every interview leads back to a common theme, ethical and moral leaders. Both the State and Local Associations producing leaders that share these traits can support better member retention. All 16 participants suggested that moral and ethical leaders were the leaders they were comfortable following. These moral and ethical leaders must understand how to navigate the complexities of having their own beliefs and values and aligning those with the actions of leadership in the organization. The importance of leaders expressing these traits of transformational leaders is an integral piece to leading organizations where members must opt-into paying to belong.

Inspirational and Visionary

Another trait observed throughout each interview is the transformational leadership trait of being inspirational and visionary. When asked about the Local Associations' vision statement, 13 out of 16 participants stated the vision correctly, and

16 out of 16 relayed the goal and message of the concept accurately. All the participants summarized the vision into one essential thought, "doing what is right for kids." The vision then ties back to the moral and ethical obligations that participants discussed. In addition to the vision of the Local Association, Leader 1 stated their belief about not only seeing the future for the students but seeing the future of the local by finding young leaders ready to take up the charge for the next generation. "The only way that you will ever build leaders is if you look for other strong people, look for other potential leaders, and groom them and train them," reiterated Leader 1. This participant also believes that all members, regardless of age, sex, race, orientation, or lifestyle, have the "capability to use their strengths to become good and effective leaders to continue to move the organization forward while also retaining membership."

One of the most critical traits of the transformational leader is the ability to inspire subordinates in many ways. Throughout the participant interviews, the theme of vision and inspiration, and leaders expressing those traits repeatedly emerged. From encouraging members to organize and fight for collective bargaining power to supporting the vision of doing "what is best for kids," to inspire the next generation to come to the table and materialize as leaders, Local Association leaders that encourage and inspire others to live the vision of the organization are the leaders that left an impression on the members remaining in the association. If retention is the goal, leaders must inspire members to want to be a part of and lead the organization.

Trusting and Collaborative

According to Leader 3, trust and collaboration build through strong relationships. The Local Association supports relationship building and collaboration through union

work and through organizing member engagement and social opportunities. The national and state-level associations have handed down the engagement model. Both subsidiary organizations also hold these engagement and social functions to build relationships, trust, and perpetuate collaboration.

The topic of member engagement also entered most participant interviews. Member 8 mentioned the socials that the Local Association puts on to provide free dinner, entertainment, and peer-to-peer engagement (see Appendix F). Member 8 also suggested that for them, the first conversation about joining the union, the first impression, is critical to both recruiting members and then retaining those members. Member 8 suggested that they still "remember that first conversation with the other member working to join." Member 8 came to the local and the district from a state that did not have a union. Member 8 remarked, "I did not understand what the union was and felt that the member trying to sign them up was very unwelcoming and aggressive." Member 8 suggested that those signing up new members should "have the training and a specific set of skills in addition to a specific personality to be the recruiter."

Member 8 shared their personal experience of the first union interaction. They left the experience feeling "scared" and believing the association should understand that the "first connection is your most important." They stated:

I mean, I signed up to be a part of the union. I'm going to pay my dues like kind of a thing. My only real interaction, and like the first bit of information I got were in this kind of like really intense way where I felt like, "I can't do this, she's just like too much." This was just someone that has been like teaching for forever, and

like I mean, like good for her, but I think like if you're coming from somewhere

one like I didn't really even like, you know a lot about the union…

Member 8 explained they "understood" where the particular member was coming

from and what the social goal of the meet and greet was but that the Local Association

was missing the mark in many ways. They stated:

So, maybe there's like an assumption that people know actually like what all the

components of the union are, and like what all the possible ways you could get

involved are. I didn't then, and I'm not entirely sure I know all the ways now

either. You know? So, maybe there is a way that like early on, like in the in that

very first interaction, it might be worth it to do something that is social and fun in

that way, but maybe started off or ended having a component that's just gives

some information without the "join now or bust" vibe.

This member came from a Southern state where teachers are not organized. This member

had little idea of what a union is, let alone the reasons for electing to join.

Other participants, including all 11 members interviewed, spoke of this concept in

various ways. All 16 of the participants agreed that "trust and building trusting and

collaborative relationships is valuable" to the leadership of the Local Associations'

ability to retain members. All 16 participants also mentioned the importance of

"believing that all voices are heard in decision making and collaboration." Member 8

talked about their ability to "fill out a bargaining survey and give input about the bargain

even though I do not actually perform the task." They attributed this type of collaboration

as a reason they continue to stay in the union.

One member viewed trust and collaboration as an area of growth for the Local Association. Member 4 believes the heart of the leadership is in the right place, but that dues collection can hinder the relationship-building process. Member 4 suggested the Local Association can sometimes "feel like a mafia; you are either in, or you're out." The participant indicated that the Local Association rethink the approach to addressing those that do not pay the union dues. The inherent model built through state and national ability has transformed the union into a debt collection agent. The Michigan Education Association institutes a model whereby the Local Association must notify and collect any members' lapsed debt. The Michigan Education Association also places the responsibility of signing up new hires in the hand of the local leaders. This model can, as Member 4 suggests, create a climate and culture for new hires or members no in good standing to feel unwelcomed and out of the in-group. Participants suggested this model be shifted, including the leaders of the Local Association interviewed for this study.

The theme of trust and collaboration was intertwined in all 16 participant interviews. This theme was one of the most significant areas of growth for the organization, according to leaders and members participating in this study. Since right-to-work is a historically new phenomenon in Michigan and the United States, the ability of nonmembers to trust members and leaders enough to sign up for the organization is a new issue with which teaching unions are contending. Member 8 reiterated, she still signed up, but the "sign up struggle" would not have been present in their internal dialogue had the member responsible for signing up new hires had been more collaborative and understanding. These traits then begin to build a relationship and group dynamic of which members want to participate.

Empowering and Encouraging

Eight out of 11 member participants agreed that they could serve as union leaders if they choose and feel encouraged by leadership to try new opportunities. Two members cited union building leaders as key people helping them to lead, and the main reason they feel secure enough to be young leaders even though the political and social environment in Michigan. Both of those members work in the same building. Member 4 had mixed feelings about being encouraged and empowered to serve in a leadership role. This member often referred to their own experience of "harassment by the district and their building leadership in retaliation for assisting new teachers in their building." Member 4 said, "This retaliation resulted in a force transfer to another building." They stated:

> I think it could also an area of growth, but they definitely do shine in certain ways. They put on professional development, and there's always encouragement to join the union in a leadership capacity. I don't know about as far as leadership in the schools. That is a different story.

Member 4 is optimistic that a change will come to both the climate and culture of the district and of the union when the new superintendent begins work during the 2020-21 school year. Member 4 attributes their negativity and fear of the leadership of the past and not the direction of the union. Member 4 acknowledged that "our union leadership cannot control some things; these things fall on the district."

Member 2 suggested the Local Association leadership appears to be very teacher concentrated. Member 2 recognized certified teachers are by far the largest group of members in the organization, but also that they wanted to see more people from other jobs in the unit participate in leadership. Member 2 also relayed, "time and commitment

are a huge factor for people wanting to remain in the union and remain in union leadership." They acknowledge because the other jobs in the unit have so few numbers, it would be difficult to recruit people other than teachers to fulfill most leadership roles.

Member 2 also stated, "I feel comfortable seeking a leadership role if I had the time and energy to do so." Time and energy is another outside factor of all 16 participants repeated. All participants in one form or another acknowledge that their jobs in education are stressful, demanding, and come with large workloads. The element of time and energy directly impacts the member's wants and desires to assist with union work. One reason Leader 1 suggested that members stay in the union is that this local is legally large enough to meet the threshold for a full-time release president. "If we did not have a full-time release president, our recruitment and retention numbers, or our membership numbers, would be awful, and there would be much-unfinished work."

The theme of empowerment and encouragement or the lack of leadership trait and action was present in every participant interview. The very existence of the organization is dependent on new leaders emerging because of the time, commitment, voluntary nature of the association, and the longevity of the education career. The members interviewed for this study felt empowered and encouraged most of the time; however, there exists a subset of members that did not feel supported by the Local Association or the State Association and sighted this lack of support as an indicator that they may eventually opt-out of the local. If other members feel this way, the leadership will want to empower and encourage them to retain members in the Local Association.

Open and Honest

All participants agreed that open and honest communication is key to keeping members in the union. The membership depends on the leadership to inform them of the truth of all matters through transparency. The Local Association leaders, according to all 16 participants, communicate in a timely, open, realistic, and professional manner. One example is the communication that occurred during the COVID-19 pandemic. The Local Association leadership sent "COVID Briefings" to all members in good standing to answer member questions, ease concerns, stem fears, and connect in general (see Appendix F). In addition to the Local Association providing this outreach and these updates, the State Association did the same for members in good standing across the state (see Appendix G). Both the Local and State Organizations stayed in constant contact with members through this COVID-19 pandemic, which, according to participants, is necessary to be considered a "good" leader and a leader capable of retention.

Leader 1 suggested that optimism is not the best way to communicate open and honestly with members, but with a sense of realism and communicated hope:

I am also realistic. And when you are communicating about our actual situation, it's not optimistic . . . about what we're going through. I mean, you have to be realistic too about what we're enduring, and what we're doing is not helpful right now. And it's not pleasant. So, if you just sit around and talk about what could be in a perfect world, I think that you union situation . . . you definitely lose members because you have to be hopeful and hope for better things, but you have to be honest, truthful, and transparent too.

Not only did the leaders participating in the study believe that honesty is the best policy when communicating with members, but also the members participating in the study stated that they valued how open the Local Association is with honest and transparent communication. All participants agreed that openness and honesty are essential for the success of the strength of the union and directly reflects the retention of members.

Outside Factors

Outside factors were the most mentioned category of selective code throughout each interview. All 16 participants cited state and federal policy as a negative influence in their education career and union membership. Leader 4 was incensed by public policy:

> I think about our union, yes, we are so strong, and together we have the power to bring positive change to help people. Our profession is another whole story. We have been beaten down by the public, by the district, by the state and federal government. We don't have high numbers in teaching education programs, and that is not a coincidence. Our profession is hard to be optimistic about given outside factors like government. I think our union strength is the number one thing that makes people feel like they should be on the team. And the sense of feeling like you belong to something like you are in the know. That is so important to know what is going on and know who to go to when you need help and support. Our union, in general, is an amazing thing. Right-to-work can suck it. It sucks, but we are holding strong through it all.

This expression of disdain was evident through all 16 participant interviews.

All participants believe that people making laws imposed in education and labor unions are neither educators nor union members. The participants agreed that current

political policy and the current political and societal climate toward educators and labor unions are not helpful to their careers or the retention of union members. All 16 participants mentioned funding for schools in Michigan as a policy that negatively impacts teacher retention and, thereby, union retention.

Member 8 referred to the current political and societal view of teachers as perpetuating a "culture of fear" among all educators. They stated:

I think, unfortunately, there's just kind of like the underlying level of, like, fear. We as teachers, or at least that I like kind of live within my profession of like, you know, just constantly being like, "Will they?" I just live in fear of like, "Will the evaluation not be good enough, or will they just decide I'm not good enough?" There's just this like atmosphere of teachers that were a little bit afraid for our job all the time, and I think; as a result, people are scared to join or be involved in the union, you know?

All participants discussed a level of fear of retribution during the interview process. Also, policy threatens the very livelihood of all participants through an arbitrary and capricious evaluation system that cannot, inherently, be objective. Member 4 made direct mention of this in their interview:

I think the opportunity is there, absolutely. I think it's dangerous, that's why I am very leery of it. I really . . . I know there's certain things that are definitely protected, but that doesn't change how you are treated and how you were looked at differently. Building and district leadership can be very passive-aggressive. I would say, personally, for me, . . . I see how it is not standardized across the district as far as it would be with evaluations. They can come make your job much

more unpleasant than what it needs to be . . . passive-aggressive comes in . . . Yes, they have to follow certain procedures to actually remove you from the building. Now, they don't think just do it, but they can. Also, just make it kind of miserable. Yeah, like your daily work experience can become miserable. Yeah, I've seen it's a heavyweight too.

This statement also encompasses other outside factors that cannot be controlled by union leadership. These factors include but are not limited to, the leadership style of the district, the climate and culture of the district, the leadership style in the school building, the atmosphere in the school building, teacher tenure laws, laws blocking teachers from having transfer, and placement rights, prohibited subjects of bargaining, and retaliation and retribution for union activities.

As mentioned previously, the amount of money that members must pay to remain in good standing is exceedingly high (see Appendix H). Most Local Association Bargaining Unit Members will pay the State Association $650 per contractual year structured in 10 payments over 10 months (Michigan Education Association, 2019b). Bargaining Unit Members must also pay a Local Association due and a National Association due. The average Local Association Bargaining Unit Member pays $103 per month for 10 payments over 10 months (Michigan Education Association, 2019b).

Other outside factors mentioned by the participants are the falling rates of teaching graduates from education programs, a large number of teacher turnover, especially of newer teachers and teachers in urban districts, teacher shortages in high-need areas, and the lack of "real" preparation for teachers entering the workforce. Some factors contributing to this "teacher burnout" translate into "teacher turnover." Mentioned

in all of the interviews are the response to social justice, equity, violence, systemic racism, trauma, and other daily systemic problems that significantly negatively impact teachers and educators in urban school districts.

Member 9 mentioned the level of "escalating violence by students on teachers" and the assaults by "parents and the community on educators." Member 4 mentioned the "burden placed on teachers and educators to hold the world up, while holding one another up, just to be beaten down by the climate and culture of the district and community." Member 9 discussed the rise in violence they have witnessed over their 30-year career in education:

> I have seen more violent behavior by younger kids. Can I tell people stuff that happens in elementary? They are like that didn't happen to you, yet assaulted teachers . . . teachers getting assaulted . . . principals getting assaulted . . . but then you know as a union member, um . . . when I was at one school, a parent came in in front of the whole class of fifth-graders and said, "they're gonna put a bullet in [my] head." And I said, "Well, here's what's going to happen. You are going to come back after school because you are scaring the kids."

Member 9 stated, "sadly, I know many more stories like this one. I have more of my own." Member 9 also added about other changes witnessed over 30 years in the field of education:

> I mean, obviously, things have changed in terms of the health coverage that we were able to get before versus now. I taught for 30 years. It's a lot worse now. Soon, I would like to see the union take really stronger strategies.

Not only have wages for educators in Michigan stayed stagnant while those in the private sector sore, but educators are also paying more for benefits and have fewer opportunities to save for retirement.

The transformational traits discovered through this research were intertwined and overlapping, supporting the choice of cyclical coding. The traits only support member retention if the leaders institute all of the traits. The members also must be receptive to these traits of transformational leaders. The general makeup of the group may affect the leadership ability to employ transformational traits to support the retention of members.

The mention of moral compass and ethics relates to the ability to collaborate and empower members to become leaders. Leader 4 expressed this in their interview:

> I like to think that I have a good moral compass and that I use those ethics and morals when I make choices and make decisions. Sure, we are all humans. A part of being human comes with bickering, arguments, not getting along, but you have to put that aside to do what is best for everyone and what is best for kids. We are constantly trying to bring new people into leadership positions and roles. Just look at all of the emails we get! I, for example, was brought into bargaining as an untenured teacher because my mentors in my building were strong union supporters, and they believed in me.

In addition to the comments made by leaders, comments made by members also support the actions of leaders exhibiting transformational leadership traits when observed by the membership.

Embedded in Member 3's interview responses are the traits of ethics and morals demonstrated in leadership actions:

I would say both in terms of advocacy for, well maybe let me rephrase that, I do

believe that in terms of the Association leadership. Well, I mean, the first obvious

example is advocating for continued membership. In fact, it going forward, the

role of the Association is going to be important in establishing equity both for

Association members and for our clients. And just the fact that they are people

that have always been willing to put in extra time and extra hours or events and

programming which aren't simply related to advocating for specific member

concerns with their advocating for the role of the Association in general.

How leaders can be visionary to adapt to the changing climate and culture of outside

leadership and policy was discussed in this interview. Intertwined with Member 3's

mention of ethics and morals are the traits of inspirational and visionary transformational

leaders.

Summary

The research collected data from 16 participants through semi-structured

interviews. I also reviewed artifacts located in Appendices F-H. While this purposive

sample of participants was diverse in many areas, the same conclusions are drawn from

each interview. The responses to the questions suggest that transformational leadership

traits can enhance the Local Associations' ability to retain members; however, outside

factors can derail all attempts by the Local's leadership to keep those members.

The interviews for this study were performed on Zoom and were stored in the

password-protected Zoom storage. I downloaded the interview audio as soon as possible.

Once downloaded, the audio was placed on a password-protected USB drive and deleted

from the computer and the Zoom storage. I stored the consent forms on a password

protected USB. All uploaded consent forms were immediately removed from the computer after the transfer to the password-protected USB drive.

The five themes in this chapter were created using a cyclical coding process. The five themes of transformational leadership traits were: (a) Ethical and Moral, (b) Inspirational and Visionary, (c) Trusting and Collaborative, (d) Empowering and Encouraging, and (e) Open and Honest. Also, the selective code "Outside Factors" is interwoven throughout much of the 16 participants' interviews. The five themes will be applied to the research questions in Chapter 5.

CHAPTER 5: CONCLUSIONS AND DISCUSSION

There is a problem with retaining teachers in teaching union locals in the right-to-work state of Michigan, which directly negatively impacts the strength of the union. The recent Supreme Court decision in *Janus v. AFSCME* also negatively impacts union retention. These policies are the leading cause of retention issues in the association. When union financial strength and strength in numbers weaken, the ability of the association to negotiate working conditions, which directly affects teaching and learning conditions, weakens (Hogler, 2017). In this specific problem are several challenges, including teacher turnover, which plays a significant role in the union's ability to retain members (Marianno & Strunk, 2018).

The purpose of this study was to identify which leadership traits contributed to higher teacher retention in the union since the inception of right-to-work laws in the State of Michigan. Identifying and applying transformational leadership traits may help locals retain members, therefore maintaining the local's strength. The strength of the local directly influences the union power at the bargaining table, which is the determining factor of working and learning conditions in the district (Grissom & Bartanen, 2019).

Hogler (2017) suggested that a president's political agenda and policy aims can directly contribute to the decline of union members and retention, which thereby correlates to the growing inequity between the wealthy, the working class, and the working poor. Wronowski (2018) studied the recruitment and retention of teachers in urban districts and concluded that policy, evaluations, pressure, and climate play a significant role in retaining teachers. Heightened are these factors in urban areas (Wronowski, 2018). By addressing the union's ability to retain teachers, the problem of

teacher turnover and retention also can improve. A union cannot keep an educator if the educator is no longer employed by the district where they started their membership. The member must sign up every time the member changes a district of employment. The three research questions guiding the study addressed the potential or lack of potential of transformational leadership traits to affect retention rates in educational locals.

A gap in the literature exists because the policies discussed and applied to this study are new. Right-to-work was passed in Michigan and 2012 and continues spreading across the country. The Supreme Court decision of *Janus v. AFSCME* was decided in the summer of 2018. This timing leaves many opportunities for further evaluation of the literature and additional topics for research and study. While every state in the union, since 2018, must contend with some form of "union-busting," not all of them have adhered to strict right-to-work laws (Antonucci, 2014). Teaching unions and educational unions are especially struggling because of the teacher and educational staff shortages and the policies (Antonucci, 2014). The lack of certified teachers retained in school districts, especially in urban areas and high-needs areas are directly influencing the teaching unions' ability to maintain membership numbers.

The purpose of this qualitative, single case study was to determine the best leadership traits to retain members in local teaching unions in urban districts in Michigan, a right-to-work state subject to the Supreme Court decision of *Janus v. AFSCME*. These traits were coded and analyzed from interview responses of a purposive sample of leaders and members, five local leaders, and 11 local members who were asked open-ended interview questions open-ended questions created from the MLQ 5x short transformational leadership questionnaire. Some artifacts were also reviewed, including

membership documents and member engagement communications. By identifying the leadership traits that best address this issue of retention, a framework was created for teaching unions in similar situations and circumstances.

The purpose of Chapter 5 is to address gaps in the literature and how this study and study findings can close some gaps in the literature while leaving areas of study open to further research. The purpose of the study was to identify transformational leadership traits that best address retention in local education associations in right-to-work states attached to urban school districts. Included in Chapter 5 is a discussion of findings, application of the findings to the research questions, application of the findings in the field of leadership, recommendations for action, and recommendations for further research.

Discussion of Findings

I designed the overarching questions to align with the root problem: addressing the falling numbers of educational union members in the United States due to state and federal policy. The three research questions encompassed transformational leadership theory to study how the traits of leaders do or do not serve to help retention in these locals. Five themes in the guise of transformational leadership traits, emerged from the cyclical coding process: (a) Ethical and Moral, (b) Inspirational and Visionary, (c) Trusting and Collaborative, (d) Empowering and Encouraging, and (e) Open and Honest. Embedded in the interview responses were anecdotes and examples of traits in action or the necessity to apply them in situations where the traits were not implemented. One selective code was more prevalent in every interview than the other selective codes,

"Outside Factors." The themes were tied to the research questions in the following three sections.

Research Question #1

Member retention cannot be discussed or studied without first acknowledging that the problem was created directly by public policy at both the state and federal level. Given the importance of policy to this research, study, findings, and discussion, the first research question was built to intertwine policy with leadership traits. As a result of policy, those productive leadership traits must be found and applied to model best practices for leaders in similar circumstances: How have right-to-work and the Supreme Court decision in *Janus v. AFSCME* affected teachers' views of the union leadership?

Dunn (2018) described the complexities of right-to-work laws and the effects of the policy on educational labor organizations, including but not limited to the policy requiring educators to reapply for membership each time they leave the employ of one school district for another. The membership that a member signed up for does not follow them from district to district. Given that teacher turnover is high across the country, especially in urban districts, this policy creates specific issues for membership retention and numbers in locals like the one studied in this case and locals in states like Michigan (Chambers, 2018).

The membership numbers alone can point to areas of growth for the locals that do not have 100% membership. Yes, some educators' political and personal views may guide those educators to avoid union membership. However, the structure of the local, organization strength of the local, and the leadership style, actions, and traits of the Local and State Association do play a role in the ability of a local to retain members (Grissom,

& Bartanen, 2019). Member 7 suggested that policy has significantly transformed their career over the past few decades, especially "within my nine years in the district, it's gotten much harder in the requirements." However, Member 7 suggested there are reasons to be "optimistic" for the future due to the "strength of the Local Association" and the ability of members to "go into a situation and know you have an advocate." While members of the Local Association attempt to see through an optimistic lens, policy dramatically impacts not only the view of members on the leadership of the union but also the views of the organization from the local to national level.

Leader 2 suggested having to sign up every teacher entering the district is very difficult because new and younger teachers "get burned out more quickly with the union, and especially in our current circumstance and situation." Having to sign up new members of the union new to the district is a direct result of both state and federal policy. This problem did not exist before 2012 in Michigan (Kaminski, 2015). The policy negatively impacts union membership retention despite other factors like leadership style and traits. The fact remains Supreme Court decisions, and state laws are hard to overturn, though not impossible. The leadership of the local, state and national educator unions would benefit from organizational change to adjust to the political climate as opposed to operating as business as usual or attempting to shift the policy of the government, which could take many years. Starting with an organizational transformation to address the falling rates of members could drastically improve membership numbers. The National and State Associations should reconsider employee and elected salaries and reorganizing the dues structure. These ideas tie back to the leadership traits of inspirational and visionary leaders and the selective codes of the organization and outside factors.

Research Question #2

Member retention is viewed much differently from the leadership lens than the member lens. Both members and leaders have the same member retention goal, but the way that goal is perceived varies significantly from leader to member and then an uninvolved member. This study had to include both lenses to form a complete picture of the effects of transformational leadership traits on membership numbers. The leaders were interviewed using the same set of questions (see Appendix A). The interview questions were built with this research question in mind: How does Local Leadership believe transformational leadership traits and behaviors contribute to membership retention?

A transformational leader in a situation similar to the situation, in this case, must behave ethically and morally to benefit the whole. The ability to retain members is directly positively or negatively impacted by the honesty and integrity of the leaders of the group (Shabane et al., 2017). After all, when members believe they have been wronged, slighted, or lied to, they can opt-out of the union and save over $1,000 per year (Michigan Education Association, 2019b). The results of this study overwhelmingly demonstrated that both the Local Association and the State Association must work together to perpetuate the traits and ideals of transformational leaders. If all three organizations, local, state, and national, do not model the same type of leadership and the same type of values, then membership will suffer and, as a result, will diminish (Kraft et al., 2016). Collaboration is necessary for the health of working conditions and therefore learning conditions (Shabane et al., 2017).

Since the policy has been proven to negatively or positively impact views by both members and leaders concerning the union and union membership, then embedded in the results of this study is the recommendation that relationships between members and leaders of all three organizations are invaluable. Transformational leaders know how to adapt both their style and the organization to meet challenges and address gaps (Donaldson, 2013). The next generation of union leadership must lead with the ability to adapt and navigate numerous complexities that the administration of the past did not contend. As an added layer of complexity, the outside factor of district leadership plays a pivotal role in retaining teachers, thereby playing a crucial role in the preservation of union members.

The leaders interviewed for this study agreed that building and district leadership plays a role in both leader and member perception of union membership. Leader 3 stated, "The way people feel about the union and being in the union might vary from building site to building site. Everybody is so different, each building each classroom." The fact remains that an overwhelming number of teachers leave the profession in the first five years (Roegman et al., 2016). No interviewee in this study suggested that teachers and educators leave the job as a direct result of the union; however, several participants broached the topic of strong associations, helping retain members and retain teachers. The perception of Local Association leaders in this study is that the more robust and more transformational the leadership, the better the odds of member retention.

Research Question #3

As with research question two, retention is viewed from a different lens when discussing members. While the retention goal for both leaders and members remains the

same, the goal is perceived differently. This study had to include both perspectives to substantiate the results. The members were interviewed using the same set of questions (see Appendix A). I built the interview questions with this research question in mind: How do the Local Association members believe transformational leadership traits and behaviors contribute to member retention?

When Member 1 responded about feeling encouraged by the leadership of the Local Association, they met with knowing there are numerous opportunities for all members to take responsibility. They stated:

> I think the Local Association is always out there advocating for people to step up
>
> and take a role in leadership. I know that has been a massive push for more
>
> professional development to come from us, the workers. I really appreciate that.

The leadership of the Local Association allows any member to learn, grow, and lead. This leadership action applies to the transformational leadership traits of empowering and encouraging members (Shabane et al., 2017).

In Chapter 2, several studies and researchers suggested valuing an educator by supporting, encouraging, empowering, communicating, and hearing will actively retain educational staff (Wronowski, 2018). The results of this study suggested if union leadership applied this frame of mind and leadership principles to lead the union, then the union members would also remain in the union and not just in the profession. Again, the conversation of how building and district leadership traits impact union membership is one avenue for further research.

The generational gaps between educators of different age groups cannot be ignored. Generational differences in membership is another area of further research on

unions and member retention. The ideals of age groups and a generation can affect a person's view of and desire to belong to a union. Also, how individuals perceive their treatment both directly and indirectly by union representation and union leaders can change a member's perspective and desire to unionize. Member 3 referred to this treatment as a "mafia mentality."

Application of Findings

There is a problem with retaining teachers in teaching local union associations in the right-to-work state of Michigan, especially in urban school districts. Dunn (2018) argued law and policy are inherently responsible for the strength or lack thereof labor organizations. This specific problem directly impacts the strength of the union and the ability of the association to negotiate working conditions, which directly affects teaching and learning conditions (Hogler, 2017). Holger (2017) suggested that political agendas and policies will not only aid the decline of union members and retention but also will contribute to the growing inequity between the wealthy and the working class. Union strength is diminished when union numbers are diminished, both monetarily and collectively (Crouch, 2017). A further issue developed from this specific leadership problem is the ability of districts in Michigan to hire uncertified teachers using an emergency certification law because only certified professionals may join the union (Dunn, 2018).

The findings and conclusions of this study reflected several ways that leaders of the Local, State and National association can adapt to overcome this specific problem. The leaders of the different organizations should display transformational traits; specifically, those suggested in the themes of this study: Ethical and Moral, Inspirational

and Visionary, Trusting and Collaborative, Empowering and Encouraging, and Open and Honest. By acting in manners supporting these traits, both the leaders and members participating in this study believe these perceptions to be critical indicators of a Local Association's ability to retain members. Intertwined, however, are the traits and actions of those in the State and National Association.

The findings of this study offered the salary of officers and employees at the state and the national level is a contentious topic. The leadership of the State and National Associations should lower their wages in solidarity with the experiences of the membership. The loss of funding for public education has been ever increasing over the years, especially in Michigan. In addition to the inadequate funding of Michigan public schools on behalf of the state legislature, Michigan consistently ranks in the bottom 15 states nationally in all areas of education (National Education Association, n.d.).

Laws, policy, salary, and dues payments aside, other outside factors like those of the building and district leadership will impact the member's and leader's views and perspectives of union membership. While local, state, and national association leaders cannot change the environment in which their specific union exists, they can affect change in the organization itself. The findings of this study are indicative of the assumption that transformational leadership traits leading to actions can change the perception of members and leaders despite outside factors, outside climate, and culture.

Application to Leadership

Given the generated codes and the nature of the research, the best approach to creating plans to address the falling retention rate of teachers in the teaching union is for the state and local associations to collaborate on recommendations for change (see Table

4). The State Association and Local Association were both selective codes revealed in

Chapter 4. The strengths, weaknesses, and growth opportunities were compiled through

the participant interviews, membership documents, and membership engagement

materials. The examples found in Table 4 were derived from the anecdotes of both

members and leaders that were then coded for the findings of the study. My intent in

creating Table 4 was for the results to produce leadership action both at the local and

state level. The strengths, weaknesses, and growth opportunities listed in Table 4 are not

the only ones to analyze but serve as examples for organizations.

Table 4

Recommendations for the Organization

	State Association (Selective Code)	Local Association (Selective Code)	State and Local Association
Strengths	Considerable union yielding power in numbers	Dedicated membership willing to stand together for rights and organize in crisis	Strong organizing potential and membership numbers
Weaknesses	Cost of membership and the level of salaries for elected officers and employees	Teacher turnover rate reminiscent of many urban school districts	The turnover rate continues to drive up the price of membership
Growth Opportunities	Lowering the cost of dues by reducing the salaries of employees and elected officers	Working to change the perception of teaching by positively collaborating with retained members	The local and state organization should work together to lower dues and organize to change the perception and to change the message

Note. The changing laws and policy, and the changes forced upon unions in Michigan,

offer opportunities for growth and positive change. Interviews were used to compile the

strengths and weaknesses mentioned by each participant.

The Importance of Cultural Awareness and Cultural Competence

Each of the 16 participants in different variations mentioned the specific issues

negatively impacting educators: child trauma, personal trauma, violence, assault, falling

wages, worsening benefits, large workloads, large class, caseload sizes, teacher burnout, teacher turnover, climate and culture perpetuated by those in power, teaching evaluations, right-to-work policy, educational policy, and other factors. The issue of social justice is prevalent through the stated problems found in the interviews. The topic of social justice is one that is especially prevalent in school districts and locals like the one in this study. Rivera-McCrutchen (2014) reiterated the importance of leaders maintaining the ability to adapt to and organize around the complexities of urban education, including moral and socially just imperatives. For a transformational leader to exhibit these abilities, they must be culturally aware and continually working on growing their cultural competence, while recognizing areas of specific incompetence to correct and develop.

Leader 4 specifically addressed the issues that come with educating students living in various forms of repetitive trauma:

> Well, I think as we continue to teach and interact with kids from trauma and as our economic disparity continues to grow . . . so we have more kids who are from poverty and, you know, all the things that go along with being in poverty, I think this becomes a more and more difficult place to teach. So, I feel like our leadership is cognizant of those difficulties and realistic, which is not a real rosy picture.

Leader 4 expressed the necessity of leaders to be realistic and honest as a vital indicator of this leader's ability to trust the organization. Without trusting the organization and the leadership, members will opt-out of the union.

Leader 5 shared a similar sentiment in their interview. Leaders both of the union and the buildings and district must maintain a cultural competence congruent with both the educational staff and the student population. They stated:

Sure economics, well, I think a lot of the kids, I mean . . . just the demographics of our district. . . . I think there are a lot of kids that come from poverty, and I think there is a lot of economic disparity within our region. I think that's kind of what I talked about, or what I think about when I think about that.

The complexities of urban education compel leaders to address issues with a moral compass and an authentic purpose.

Shabane et al. (2017) reiterated the importance of transformational leaders to build relationships with all stakeholders by leading to adapt and transform through authenticity and morality. District leaders must work in conjunction with the union leaders to create environments suitable for retaining teachers in urban districts. This transformational leadership is one that requires a moral imperative to do what is socially just and right for the district and the community, and the staff (Simola, 2016).

Outside Factors

The time has come for the leaders of the national and state associations to join together to inspire members to work for change in dues structures and the salaries of employees and elected officers and positions. Chambers (2018) regarded the lack of teacher candidates graduating from institutions, and the lackluster training provided the graduates as a leading cause of the educator shortage in the United States. The educational unions in the country cannot necessarily directly affect change in this area. However, the locals and significant associations can provide training to these new

teachers. Those groups can also lobby colleges and universities to update the programming in their schools and practice in the program to better prepare educators for the reality of the current workforce.

Local, state, and national associations are not responsible for state and federal policy, but they are responsible for lobbying the governments in each state and the federal government. The leadership at all three levels must rethink their organizational structure to provide more support to members in the area of public policy. If all three levels of the organizations do not put more time, money, energy, and workload into changing policy, the stark reality is that the groups will eventually be so powerless they will fold. The union—at all of its levels—must be willing to adjust the leadership styles and roles of the organization to produce a climate, culture, and environment conducive to retention (Kraft et al., 2016).

Recommendations for Action

The findings of this study result in several recommendations for action. The first and overarching recommendation is for leaders of all three levels of the organization to exhibit traits of transformational leadership theory to then act in ways that both Local Association Members and Local Association Leaders believe to be congruent with member retention. In addition to the overarching findings incorporating the coded themes are three specific recommendations for action: stop the "mafia mentality," recognize minority groups in the organization and expand cultural competence and understanding of diversity.

The Cost of Admission and the "Mafia Mentality"

While no leaders specifically spoke to the mentality of the "old boys network" or the perpetuation of the "in-group," at least eight members mentioned this concept in one form or another. As a direct result of policy and organizational structure, the Local Association has become dues collecting agents. The State Association collects more of the monthly dues for the State Organization. Still, the Local Association is responsible for signing up members, helping members opt-out, and collecting back dues. This organizational structure has caused a climate and culture of disdain among some of the members. This organizational structure has also caused contention between those who "do pay" and those who "do not pay." Being a debt collector is in direct conflict with being an organization of collaboration, trust, encouragement, and empowerment. Member 3 gave a lengthy response when discussing the specific topic of in-groups and out-groups. They attributed communication and how leaders and members communicate with the high membership numbers of the Local Association. Member 3 stated:

> Well, probably the most important factor in retaining members is communication work is going on, and that's a real challenge in our field; professional educators are mainly focused on their reality. I would say that you know, communicating that in meaningful ways is just an ongoing challenge. This is a concrete example. If it's not time to find out about contract compliance or something like that very often easily falls to the bottom of the priority list in favor of your lesson plans or the resources you're trying to gather. As a union supporter and advocate, it is a little closer to the top of my list. The association's ability to have a certain amount of agility and nimbleness to deal with just myriad specific issues, and very often I

think for individual members in their work, that there can be a certain kind of narrow focus. A kind of a blinder or effect of not understanding.

In addition to this trait of open and honest communication with everyone, Member 3 stated the importance of understanding where everyone is coming from when we discuss union membership and money or debt collection with members and nonmembers:

> Some of the larger forces that are at work impact them, and they only see the way it affects those inside of their box... It may be the school district's response to forces outside. Getting members to understand that, rather than having this sort of "Darth Vader" model in their head, or that there is some bad actor actively trying to handicap or undermine them, it is merely a ripple effect much larger issue that is going on.

Member 4 coined the phrase "mafia mentality" found in this study. Member 4 believes the debt collection and in-group mentality is a direct reason for the percentage of people not in good standing or opted-out of the local, thereby the state and national organizations. Member 4 suggested that leaders approach the debt collection from a place of understanding and that they do not withhold information from nonmembers. The participants overwhelmingly agreed that an adjustment in communication is needed at the local level concerning the debt collection aspect. The participants also agreed that the State and National Organizations fall below the standard of appropriate communication.

For this view of the in-groups and out-groups to change, the State Organization will have to become responsible for debt collection outside of the Local Association Leadership. Asking those who are to sign up members and responsible for building an

organization of trust and collaboration to also debt collect and, in some cases, strong-arm people is an ineffective approach to not only member retention but also recruitment.

Recognize the Minority Work Groups in the Unit

The age of membership does matter, and generational influences do matter to the ability of a local to retain members. Teachers of the baby boomers generation did not have the laws of the current day to contend with when they began teaching. The participants with over 20 years of experience in education agreed that the job has become overwhelmingly more difficult and demeaning as their careers have continued. All members are dealing with the policies. However, member differences will change member interpretation. Variations can include generation, race, ethnicity, gender, and societal roles. These differences will invariably contribute to communication issues and misunderstandings.

To protect the identity of this participant, I will not state which participant this idea came from; this participant discussed the fact that smaller job categories in the more significant local often are not heard from this participant's perspective. For example, counselors and psychologists make up a tiny percentage of locals. Teachers comprise the overwhelming majority of the Local Association. Members in the smaller groups perceive that they are not heard as often as teachers. Whether the perception is validated through fact, the perception exists, nonetheless. Therefore, this perception needs to be addressed if retaining members is the goal. To corroborate the undisclosed participant's comments, Leader 5 mentioned this lack of attention to smaller groups. Sometimes, the union can appear as a group one must break into as opposed to a group where one just belongs. Leader 5 suggested, "I think that's part of why they feel like, if they are on their

own without the support of the union, then they're more likely to be subjected to unfair decisions."

Cultural Competence and Understanding Diversity

In May 2019, the Michigan State Government threatened to close Benton Harbor Public Schools (BHPS). BHPS educates 2,000 students, 64% of whom are students of color (National Center for Education Statistics, 2020). According to the National Center for Education Statistics (2020), BHPS comprises 61% of families with access to broadband internet, 45% of families living below the poverty line, and 51% of families receiving government food assistance. The median family income in the district is $31,000.00, and 58% of students live with a single mother, while 11% of students live in a single-father household (National Center for Education Statistics, 2020). Eighteen percent of BHPS students live in homes with unemployed adults. The Governor presented a plan that closed Benton Harbor High School and left open one K-8 school. The consequences of this plan are the high school students must find other high schools and transportation to attend. A high poverty area with many people of color would again lose an institution of learning. Students would need to figure out how to get their education away from their community once exiting the eighth grade.

The leadership of the State Association publicly and officially stated Governor Whitmer was doing the correct thing. In a press release put forth by the Michigan Education Association (MEA; 2019c), the president of the state organization made a statement about the closure and stated:

This is a bold solution that will put Benton Harbor students on a path to success. The MEA is ready to partner with our local members, the local school board,

surrounding districts, Lake Michigan College, and everyone else who wants to

ensure Benton Harbor students and educators can thrive. (para. 4)

The response of locals with similar circumstances as Benton Harbor was outrage.

Leader 1, a participant in this study, rallied responses from their members in the

Local Association. The Local Association protested the closure by the state of two

elementary schools in the district. Given the members of this Local Association have

fought school closures, the members did not agree that closing the high school was the

correct solution for the students living in that district. Michigan has a long history of

closing schools in areas where people of color live and where people of low

socioeconomic status live, such as Detroit.

Member 1 summed up cultural competence in their interview when asked about

the moral and ethics of the Local Association and State Association:

Our local tries to do the moral thing. That is a hard thing to gauge because where

my morals and ethics lie, it does not always seem that both our local and state

leadership is being 100% lines up with my views. But, I do not think it is

unethical either. . . . But, I also know there is a lot of fighting that goes on behind

the scenes that I am not necessarily privy to, and I do not actually want to know

all that is going on there.

The participants in this study suggested that the cultural competence of leadership

is critical to member retention. This cultural competence has to apply to the Local

Association. The leadership treats all members and nonmembers and how the association

follows the organizational mission. The cultural competence or lack thereof from the

state and national level can also impact the Local Association's ability to retain members.

Recommendations for Further Research

The right-to-work phenomenon and the Supreme Court decision of *Janus v. AFSCME* are historically new. The Local Association and State Association in this study will not match every local and state association across the country. Every public school district in the state and across the country are unique despite sharing similarities. State laws and policies vary on labor. There is an opportunity for researchers to study each type of district in every kind of state. Researchers can also track the implications of federal policy in each of those circumstances. I am a dues-paying member of the Local Association studied in this case. Researchers without a personal stake in the membership retention of the locals would view the research and findings from a different perspective.

This case was comprised of educators working in an urban district. Working in this environment creates a unique set of circumstances, studying a local in a rural climate. The setting of the type of school and district where the members and leaders work will play a role in the findings. Researchers have an opportunity to study regions of different types of demographics to ascertain whether the results of this study may apply.

The demographics of the district are not the only outside factor that could affect union membership retention. The organizational structure and leadership style of the district in a given study will inevitably affect the results and findings of the study. Also, the leadership style in each school building may directly impact union membership. While the union leaders cannot always affect change in either of these areas, there may be individual leadership styles better suited to different locals.

The leadership style of the Local Association, State Association, National Association, and district all play a role in the local's ability to retain members.

Leadership, however, is not the only factor, nor is public policy. The demographics of membership also plays a role in the local's ability to retain members. There exists an opportunity for researchers to study how gender, societal roles, race, ethnicity, religion, age, family size, salary, and benefits, among other outside factors, play a large part in union member retention. One other factor that should be carefully studied is salary (i.e., of elected union officers at all three levels and employee salary at all three levels) and its effect on union membership. Mentioned repeatedly in this study was the membership's dismay with the high salary employees and officers of the State Association and National Association are making off of dues dollars. At the same time, the trend of education salaries across the country continues to decline.

Concluding Statement

The history of labor and organizing in the United States is fraught with conflict and politicizing on both sides of the aisle. Public education in this United States also has a history burdened with violence, racism, inequity, inequality, and other moral and civic dilemmas. The field of leadership also contains contentions between styles, tools, skills, and other ideas. Due to recent policy changes, the political climate of the country, the state of public education, and the decline of teachers in the profession, the discussion of the viability of unions are one now in the general conjecture. The leadership of associations on the local, state, and national levels must adapt to address the myriad of changes and adverse effects impacting union membership. If leaders at all levels do not address both the systemic problems and newly occurring issues, the educational unions in the United States will eventually phase out due to inactivity, monetary loss, and low memberships.

This study provides a framework of leadership traits to encourage member retention in teaching locals attached to urban school environments in right-to-work states. Through transformational leadership traits, leadership actions can perpetuate retention. With honest and open communication, leaders are trusted and then empower and encourage members to not only belong but also become leaders. Through a visionary and inspirational lens, the leadership at all levels can create organizations conducive of membership engagement, involvement, and investment. The reality of the current environment in which all labor unions exist is that there will be a constant barrage of attacks and negative policy thrown in the direction of the membership. While the leaders at all levels of union organization may not have the ability to change or affect a change of outside factors, these leaders can organize and lead in such a manner that propels membership despite the factors mentioned above.

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APPENDIX A

Interview Questions

The semi-structured interview questions for members are:

1. Do you believe the leadership of the local goes beyond self-interest for the good of the group? Why or why not?
2. The leadership of the local considers the moral and ethical consequences of their decision making? Explain.
3. Do you believe the leadership of the local speaks optimistically about the future? Explain.
4. Is the leadership of the local constantly thinking about process and procedure and how to make them better and more efficient?
5. Do you agree or disagree with this statement? Explain. The local leadership helps others to develop their skills and become leaders.
6. Do you believe that the local leaders are advocating for members and positive change? Explain.
7. Do you believe all members have a stake in playing a leadership role in the organization?
8. Do you feel decisions made by local leaders are in your best interest?
9. Do you believe in your ability to grow as a leader under the current local leadership?
10. Do you believe there is a clear vision for the organization? What is the vision? Do you believe the local leaders are supportive of this vision?
11. Are the local leaders effectively retaining members? How do you know?
12. What factors do you believe play a role in the high membership numbers of this local?

The semi-structured interview questions for leaders are:
1. Do you believe your leadership goes beyond self-interest for the good of the group? Why or why not?
2. Do you believe your leadership approach is considerate of the moral and ethical consequences of your decision making? Explain.
3. Do you believe you speak optimistically about the future? Explain.
4. Is the leadership of the local constantly thinking about process and procedure and how to make them better and more efficient?
5. Do you agree or disagree with this statement? Explain. The local leadership helps others to develop their skills and become leaders.
6. Do you believe you are advocating for members and positive change? Explain.
7. Do you believe all members have a stake in playing a leadership role in the organization?
8. Do you feel decisions made by local leaders are in the best interest of the organization?

9. Do you believe in your ability to grow future leaders under your current local leadership?
10. Do you believe there is a clear vision for the organization? What is the vision? Do you believe the local leaders are supportive of this vision?
11. Are the local leaders effectively retaining members? How do you know?
12. What factors do you believe play a role in the high membership numbers of this local?

APPENDIX B

CITYU Research Participant Informed Consent

Title of Study:
Retaining teachers in the teaching union in one urban district in Michigan, a right-to-work state.

Name and Title of Researcher(s):
Jennifer Aniano

Faculty Supervisor: Deanne Larson
City U Email: Dlarson@cityu.edu

Key Information about this Research Study

You are being invited to participate in a research study.

The researcher will explain this research study to you before you will be asked to participate in the study, and before you sign this consent form.

- You do not have to participate in this research.
- It is your choice whether you want to participate in this research.
- Your participation is voluntary, and you can decide not to participate or withdraw your participation at any time without penalty or negative consequences.
- You should talk to the researcher(s) about the study and ask them as many questions as you need to help you make your decision.

What should I know about being a participant in this research study?

This form contains important information that will help you decide whether to join the study. Take the time to review this information carefully.

You are eligible to participate in this study because you are a member or leader of the Kalamazoo Education Association.

You will be in this research study for approximately 1 hour to complete an interview.

About 25 individuals will participate in this study.

To make your decision, you must consider all the information below:

- The purpose of the research
- The procedures of the research. That is what you will be asked to do and how much of your time will be required.

- The risks of participating in the research.
- The benefits of participating in the research and whether participation is worth the risk.

If you decide to join the study, you will be asked to sign this form before you can start study-related activities.

Why is this research being done?

__Purpose of Study:__
__The purpose of this study is to uncover the leadership traits supportive of retaining teachers.__

Research Participation.
You will be asked to participate in the following procedures:

I understand I am being asked to participate in this study in one or more of the following ways (initial options below that apply):

Respond to in-person and/or telephone Interview questions; Approximate time 1 hour.

or

Answer written questionnaire(s); Approximate time 1 hour.

You may refuse to answer any question or any item in verbal interviews, written questionnaires, or surveys, and you can stop or withdraw from any audio or visual recording at any time without any penalty or negative consequences.

Are there any risks, stress, or discomforts that I will experience as a result of being a participant in this study?

Taking part in this research involves certain risks: This could include:
1. Members of the organization reading about your responses in the dissertation though your name will never be used.
2. Leaders of the organization reading about your responses in the dissertation though your name will never be used.
3. COVID-19 refers to the Coronavirus that is being spread across people in our communities. We need to provide you with important information about COVID-19 (direct individuals to local Department of Health information on COVID-19), and to review your study participation because of COVID-19 related risks. To minimize risk, contact with the researcher will only be conducted by telephone and/or video interviews. You will not be asked to meet with the researcher in person.

Will being a participant in this study benefit me in any way?

We cannot promise any benefits to you or others from your participation in this research. However, possible benefits may include a better understanding of how to retain teachers. You will not receive any payment for participation in this study.

Confidentiality

I understand that participation is confidential to the limits of applicable privacy laws. No one except the faculty researcher or student researcher, his/her supervisor, and Program Coordinator (or Program Director) will be allowed to view any information or data collected, whether by questionnaire, interview and/or other means.

Steps will be taken to protect your identity; however, information collected about you can never be 100% secure. Your name and any other identifying information that can directly identify you will be stored separately from data collected as part of the research study. The results of this study will be published as a thesis and potentially published in an academic book or journal or presented at an academic conference. To protect your privacy no information that could directly identify you will be included.

All data (the questionnaires, audio/videotapes, typed records of the interview, interview notes, informed consent forms, computer discs, any backup of computer discs and any other storage devices) are kept locked and computer files will be encrypted and password protected by the researcher. The research data will be stored for years (5 years). At the end of that time all data of whatever nature will be permanently destroyed. The published results of the study will contain data from which no individual participant can be identified.

Signatures

I have carefully reviewed and understood this consent form. I understand the description of the research protocol and consent process provided to me by the researcher. My signature on this form indicates that I understand to my satisfaction the information provided to me about my participation in this research project. My signature also indicates that I have been apprised of the potential risks involved in my participation. Lastly, my signature indicates that I agree to participate as a research subject.

My consent to participate does not waive my legal rights nor release the researchers, sponsors, and/or City University of Seattle from their legal and professional responsibilities with respect to this research. I understand I am free to withdraw from this research study at any time. I further understand that I may ask for clarification or new information throughout my participation at any time during this research.

I have been advised that I may request a copy of the final research study report. Should I request a copy, I understand that I will be asked to pay the costs of photocopy and mailing.

Participant's Name:

Participant's Signature: Date:

Researcher's Name: Jennifer Aniano
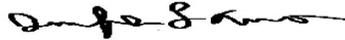
Researcher's Signature: **Date: 4.22.20**

If I have any questions about this research, I have been advised to contact the researcher and/or his/her supervisor, as listed on page one of this consent form.

This study has been reviewed and has been approved by the Institutional Review Board (IRB) of City University of Seattle. If you have questions about your rights as a participant in this study or to discuss other study-related concerns or complaints with someone who is not part of the research team, you may contact the IRB at IRB@Cityu.edu.

APPENDIX C

Bracketing Statement by Researcher Prior to Each Interview

To maintain the honesty and integrity of the research study, I am informing you that I once played several leadership roles in the Local Organization. I have also professionally worked with some participants in the union or in the school buildings. I have a personal friendship with some participants and others are acquaintances. I am a due paying member of this organization. I am using a technique called bracketing to note any bias that may occur during the interview process. Do you have any questions about the potential bias presented by the researcher's experience?

APPENDIX D

Bracketing Notes

The following noted bias occurred during the interview to support the practice of

bracketing:

- I, at times, empathized with the members and leaders. For example, a participant would say something about how being an educator in Michigan has become increasingly more difficult over the years. I sometimes verbally agreed with the participant.
- I noted professional relationships or friendships with participants where they existed.
- I noted I am a due paying member of the organization.
- I noted that I was once a leader of the organization but resigned to peruse this study.
- I sometimes verbally sympathized with the participants when discussing the climate and culture of the district.
- I am in the same career field as the participants and I know the job and organization the participants described.

APPENDIX E

Participant Correspondence for Informed Consent

Dear study participant,

Thank you for taking the time to assist me with my study and volunteering to partake in an interview through phone, Skype, Facetime, or Zoom. This interview should last no longer than 1 hour. The interview will be recorded so that I may transcribe and code the data. Please review the attached consent form. Sign and return the form to me. If you should have any questions or concerns, please let me know. Thank you for your participation in my study! Here is a brief outline the proposed study: The case is the leadership of the Local Association, which is a subsidiary of the Michigan Education Association and the National Education Association. Interview questions will be asked of key leaders within the Local Association and from a sample of the Local Association dues-paying members. These interview questions will incorporate the transformational leadership theory. The goal of the proposed study is to determine how effective both members and leaders believe transformational leadership traits are on the ability of a local to retain members. Necessary artifacts will also be reviewed. Please sign and return the CityU study participant consent form prior to the interview.

APPENDIX F

Email Exchange Between Researcher and Local Organization Administrative Assistant

On Member Engagement Events

I am so happy to be able to help.

Here is the best of my recollection:

1. We had a new hire social at the beginning of the year @ 600 20 existing 15 new hires showed up.
2. Growlers Baseball event about 35 people
3. 2 trivia = getting to know your contract event, both burger bars 1. @ Louie's = 20 2. 600 =20
4. Escapology = about 30 members or potential attended
5. Bowling and Food @ Airway = about 30 new or potential members.
6. Dinner and a movie = about 25
7. Breakfast @ Burdick's = about 25

APPENDIX G

COVID-19 Member Engagement/Communication

Dear Members,

First, thanks for what you are doing to meet the Continuity of Learning (COL) Plan. We have just jumped a huge hurdle knowing that we will continue to be paid, and do not have to make up any days under Governor Whitmer's Executive Order 2020-35! Thanks for helping each other out during this time. Some of you are enduring some challenging situations, such as being a parent and teacher at the same time. I congratulate all of you. We have been off for 5 weeks and we have 7 left this school year. Keep this in mind,

"You don't get any points in life for doing things the hard way." --Tim Fargo

This week we finished what I call, Phase II of the COL Plan. Phase I seemed to go well, as the online PD seemed sufficient. [The Local Organization] is excited about the possibility of online PD being utilized in the future to differentiate learning for members. Phase III, as you know will begin next week with full implementation of the COL.

There remain many questions that need answers from the district. A few are listed below with what information I have, along with helpful hints. For further clarification, please contact your principal.

- Why were students already in my Google Meet class before I got there and how do I prevent this? Since Meet doesn't allow for controls needed in order to run a smooth classroom environment, the video below may help you with this problem, but it will not solve the array of issues you will experience. Please watch the video below to learn how to join your Google Meet prior to your students and how to keep students from rejoining after you leave and to not join until you are present.
- What is the plan for students to gain access to the COL online? Will devices be loaned out? How will students get internet access? The district announced that Chromebooks would be loaned out per the scheduled posted online this week. This came out with little notice to families and only in an online format leaving many families out of the loop. This link (Free and Affordable Internet), found on the district website contains some information for parents regarding how they can gain internet access. No other plan has been released to provide internet access for all.
- Will Marking Period 5 report cards need to be completed? No. Report cards will be marked in the future as Credit/ No Credit for secondary and Pass/Incomplete for elementary.
- Who at the District level do parents contact when they have questions or concerns? Have them reach out to your principal if you cannot answer their questions.

- Will work packets go home from High School?
  Yes, work with your principal to arrange this. KPS will print them if your principal sends your lessons. Materials are sent home on Friday for High School now in the 4 core areas.
- If you have upgraded your internet, or installed new service, email your bills to Cindy Green for reimbursement.
- Please complete contact logs in Illuminate for 2 and hour (secondary) only per the COL. You may have logged all hours due to an inaccurate directive. You may have inadvertently "written over" another teachers' information. Please let Cindy Green know if you think this occurred and was not rectified.
  If you or families need Technology assistance, please contact Technology Services using the following methods: Click here for the Learning Hub
- Please don't use your private phone number to contact students. Instead you could use Google Voice with a personal Gmail account on your Chromebook. Your TAG person may know another way to get around giving out your personal info.
- Families can view the full learning schedule by going to this link Weekly Schedule by Grade Level or by picking up a printed packet at the Grab and Go meal sites on M., W., and F.
- Do you need help contacting students, know of students that could use packets delivered to them or need help during synchronous meetings? Please inquire with your principal on these issues as paraprofessionals and others are looking for meaningful work per the Executive Order.
- The next step for the Plan will be for the Board of Education to approve it and then the ISD for final approval. If you have concerns with the COL, please first express them to your administrators. If you are not heard, please contact me and I will help you.
- The District unilaterally decided that it would run a Disaster Relief Childcare Center (DRCC) under Executive Order 2020-16 . The organization is pushing back on the district after they directed paras to work at two sites, District did not ask for volunteers at first but now due to the organization's advocacy they have reconsidered. Now only volunteers will run the centers and will be paid $20/hour.
- If you have a class size or prep overage, please use the language in Art. 7 to turn that in as soon as possible. You will use a read receipt and the overage form found on the district intranet. If you cannot locate it, please email Steve Leland to request this form.
- [The Local Organization] meetings will continue to be held on the original dates in the calendar. The meetings calendar can be found here. The times may change for some sites due to the COL. Please inquire with your AR.
- After school meetings, such as PD meetings, department meetings, etc. will no longer be held for this school year. If you want to attend a meeting called by the principal and it is a meeting other than the weekly 1-hour staff meeting, it will be voluntary.
- Please enforce Article 6 language (p. 9) which reads "The appropriate administrator shall notify staff by email of required and voluntary meetings not posted on the contractual calendar no later than Tuesday by the end of the teacher work day of the week prior to the meeting date."

- Please enforce Article 8G language (p. 16) which reads "The District shall provide each bargaining unit employee an email address for conducting school related business communications. A bargaining unit employee's immediate supervisor shall be responsible for ensuring all District level communications related to job responsibilities are forwarded to each employee. Bargaining unit employees may opt into the use of their personal mobile device for business related text messaging or instant messaging. Bargaining unit employees shall not be required to act upon or respond to a text message or instant message. Bargaining unit employees may opt out at any time.

The State Association has Provided This Dues Structure Information

How are State Association dues determined?

For MEA, are set by delegates to the MEA Representative Assembly in conjunction with the adoption of the MEA budget. Per MEA governance documents, the MEA active membership fee

For those members with a contractual salary/wage for the prior year of fewer than five thousand dollars ($5,000), one and forty-four one-hundredths percent (1.44%) of each member's contractual salary/wage for the prior year ending June 30 earned for work in a bargaining unit represented by MEA or one of its affiliates

For those members with a contractual salary/wage for the prior year of at least five thousand dollars ($5,000) but less than ten thousand dollars ($10,000), one and forty-four one-hundredths percent (1.44%) of each member's contractual salary/wage for the prior year ending June 30 earned for work in a bargaining unit represented by MEA or one of its affiliates.

For those members with a contractual salary/wage for the prior year of fewer than fifteen thousand dollars ($15,000), one and forty-four one-hundredths percent (1.44%) of each member's contractual salary/wage for the prior year ending June 30 earned for work in a bargaining unit represented by MEA or one of its affiliates.

For those members with a contractual salary/wage for the prior year of fifteen thousand dollars ($15,000) or more one and one-half percent (1.5%) of each member's contractual salary/wage for the prior year ending June 30 earned for work in a bargaining unit represented by MEA or one of its affiliates provided that the active membership dues calculated under this paragraph shall not exceed six hundred fifty dollars ($650).

How are NEA dues determined?

National-level governance documents set NEA dues.
Per the NEA Bylaws, the NEA full-time membership fee shall be ".00225 times the national average annual salary of classroom teachers in the public elementary and secondary schools (rounded to the nearest dollar) plus .00055 of the national average annual salary of classroom teachers in the public elementary and secondary schools (rounded to the nearest dollar) to be allocated to the UniServ grants according to the policy of the NEA Board of Directors." The dues are based on prior year salary data. Dues for ESP members are determined based upon the national average annual salary of school employees in educational support positions, but in no event shall the contributions be less than one-half the active dues for classroom teachers.

How much of my dues go to political candidates?

None! State and federal campaign finance law state that we are not allowed to contribute dues money to political candidates – so we don't! Only voluntary contributions to the

MEA Political Action Committee (MEA-PAC) or the NEA Fund for Children and Public education can be used for that purpose at the state and federal levels, respectively. However, every decision affecting public education is made by an elected politician at some level (local, state, or federal). As such, dues dollars can be and are used to lobby lawmakers and communicate about important education issues with the public.