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Perceived effects of teachers' unions on administrators' and teachers' roles and morale

Eileen E. Berg
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2009

ABSTRACT

Perceived Effects of Teachers' Unions on
Administrators' and Teachers' Roles and Morale

by

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M.C.E., University of Calgary, 2002
B.Ed., University of Toronto, 1970
B.A., York University, 1969

Doctoral Study Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Education

Walden University
January 2009

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ABSTRACT

Bill 160 in Ontario removed administrators from teachers' federations creating an unhealthy gap between groups and a lowering of morale for both. The purpose of this study was to determine if there is a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles and morale. Learning and organizational theories provided a theoretical framework for this quantitative study. Voluntary participants included teachers and administrators from Canadian Education Association and administrators from Ontario Principals' Council. Questionnaires addressed three hypotheses, which dealt with level of morale between participants, correlation between the morale score and the learning environment score, and difference in morale between teachers and administrators when the learning environment was controlled. Two measures standardized through a panel review and pilot study were used: Teacher/Administrator Morale and Learning Environment questionnaires. A continuous scale measured the dependent variable, *morale* and the independent variable, *learning environment* whereas a categorical scale measured the independent variable, *role*. Two-sample *t* test, Pearson's correlation coefficient, and multiple regression analysis analyzed the data. Significant findings indicated that learning environment scores affected the morale of administrators more than teachers. Results will fill the gap between research and practice, suggesting a need for further knowledge on teachers' morale. Social change is accomplished through student achievement, a result of administrator/teacher collaboration and resultant increased morale. Social change might also occur if teachers had the option of belonging to a teachers' union in Ontario as in the United States.

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SECTION 1:
BACKGROUND

Introduction

Labor relations provide a significant perspective on educational change, including between different cultures (Wang, 2004). Differences exist between American and Canadian labor relations in the field of education (Litzcke, 2001). In Canada, throughout the 20th century, there have been periods of collaboration between administrators and teachers' unions, as well as periods of unrest. In the United States, adversarial collective bargaining has been the norm of the relationship between teachers' unions and administrators for 3 decades, and the traditional industrial union model has been seen as promoting a competitive scenario where there is no collaboration between the constituents (Urbanski, 2003, as cited in Quinn, 2003). Another difference between the two countries is that membership in a teachers' union is mandatory in Canada, whereas in the United States membership is optional.

With the introduction in Ontario, Canada, of the Education Quality Improvement Act, 1997 (referred to in this dissertation as Bill 160, 1997), administrators became managers and no longer belonged to the teachers' union (Trute, 1999). Changing the roles and responsibilities of administrators may have altered unique relationships in education in the province as administrators may have built trusting, collaborative relationships with teachers when they belonged to the same union and perhaps that trusting relationship was altered as a result of Bill 160.

Section 1 discusses the following topics: (a) background; (b) problem statement; (c) nature of study; (d) purpose; (e) theoretical framework; (f) operational definitions; (g) assumptions, delimitations, and limitations; (h) significance of study; and (i) process and content summaries.

Historical Perspectives

The history of teachers' unions in Canada has been documented in great detail (Smaller, 1998). In Canada, educational structures developed similarly to how they developed in the United States. Initially, as the community took responsibility for education, teachers were not protected by any collective agreements. In the middle of the 19th century, schools were governed by locally elected trustees responsible for only one school. Later, centralized control, which included control over operational issues such as curriculum and funding, became the norm. During this same period, elementary and secondary school teachers' associations evolved, similar to the National Education Association (NEA) in the United States. Material interests of classroom teachers were not a priority; rather, the focus was on dedication to the profession.

At the beginning of the 20th century, Canadians experienced social and economic disruption, as well as the First World War. During this time frame, independent local and provincial teachers' associations developed across Canada. Parallel to the American Federation of Teachers (AFT), these independent teachers' associations focused on the improvement of teachers' conditions. However, politically, the comparison with AFT stops there; in Canada principals focused on managing schools rather than on improving

teachers' conditions. As a result, the independent teachers' associations also resembled the American NEA, whose focus was on dedication to the profession (Smaller, 1998).

The overall goal of these associations, however, was to improve conditions for teachers. Superintendents were no longer eligible to be part of the association and principals took on responsibilities. The members of these new associations worked collaboratively to promote education and the image of the professional teacher. Relations between the unions and the local/provincial state officials remained positive, and in the 1920s and 1930s, teachers' associations in Ontario shared office space with the organization representing the school trustees. In addition, union leaders preferred centralization to decentralization (Smaller, 1998).

Regional differences existed. Until the mid-1930s, in western Canada, confrontational stances were taken, necessitating the need for strike funds in case relationships between the union and provinces deteriorated (Smaller, 1998). In British Columbia, teachers were affiliated with the national Trades and Labor Congress in 1934. Their gains included standardized teachers' contracts and minimum salary wages (Smaller, ¶ 7). Unfortunately, there was no such progress in other areas of Canada. As a result, teachers in other areas became more agitated and politically active, endeavouring to create a potential crisis (Smaller, ¶ 12).

As a result of political activism and to avert a possible crisis, union leaders, trustees, and politicians across Canada considered actions that would ensure an amicable relationship between the parties. They drafted legislation that was unique in the Western

world—the Teaching Profession Act (1990), which was introduced in the 1930s and subsequently passed in every province by the end of the 1940s.

First implemented in Saskatchewan in 1935, the act required every teacher to belong to a teachers' union; however, the government determined the political framework (Smaller, 1998). Teachers had no control over determining training, certification, or teaching practices of their members (Smaller, ¶ 13). As well, teachers could not make decisions relating to matters affecting everyday practices of teaching and learning (Smaller, ¶ 13). Moreover, teachers had no collective bargaining privileges.

Legislation required that teachers' associations establish a discipline committee to hear charges of professional misconduct against teachers, and to impose sanctions in order to abolish unprofessional conduct (Smaller, 1998). For several decades following the provincial enactments of this legislation in the 1930s and 1940s, relations with local and provincial governments remained or returned to that of a collaborative nature (Smaller, ¶ 17). These relations and discipline committees worked to ensure appropriate teacher behavior.

As a result of these controls over teachers, 30 years passed before teachers began to assert themselves again and ask for the right to bargain collectively. However, conditions improved for teachers during the 1970s and 1980s (Smaller, 1998, ¶ 19), beginning in December 1973, when teachers in Ontario closed schools for one day to stress the importance of collective bargaining.

Across Canada, as part of radical restructuring, the late 1980s and 1990s showed renewed political attention to professionalism among teachers along with increasing

structural control over teachers' work (Smaller, 1998). One form this control took was the establishment of provincially legislated Colleges of Teachers; British Columbia's version became effective in 1988, and Ontario's in 1996. The Conservative governments in both British Columbia and Ontario introduced these Colleges of Teachers as a means of returning to "back-to-basics" governments (Smaller, ¶ 20). The Colleges' focus was on standards of practice, investigation, and disciplining committees (Smaller, ¶ 20).

In Ontario, the College of Teachers was promoted to the public as a new way to enforce standards of practice for teachers and ensure proper teacher behavior in the classroom (Smaller, 1998, ¶ 21). Teachers viewed the College of Teachers as a way to have some professional self-control and professional autonomy (Smaller, ¶ 21). The Minister of Education could overrule any action of this board (Smaller, ¶ 22).

Teachers' unions in Canada have undergone restructuring throughout the decades in order to establish an identity for their members. The College of Teachers introduced a sense of professional self-control and professional autonomy in an attempt to balance the power of the teachers' unions.

Political Perspectives

During the 1990s, Ontario underwent political restructuring. At that time, Ontario had three political parties, each with different ideas about education: "the centralist Liberals; moderately left-wing New Democrats; right-wing, business-oriented Conservatives" (Majhanovich, 2002, ¶ 4). The perception was that each government wished to undo what the previous government had instituted. The Conservative government of the time criticized the teachers, unions, and the results of public education.

Whatever educational restructuring had been taking place, another broader agenda, dealing with the reduction of government support for social services (Majhanovich, 2002, ¶ 6) and possible privatization, was the priority. John Snobelen, the Conservative Minister of Education, wanted to “create a crisis” by indicating that teachers and their unions were responsible for the dysfunctional public education system (Majhanovich, ¶ 6). In September 1997, Snobelen introduced Bill 160, legislation that would restructure education with respect to curriculum and administration (as cited in Majhanovich, ¶ 6). The government introduced amendments in November of that year; final passage of the bill took place in March 1998. The bill’s features included:

1. Centralization of funding—government, and not local boards, now controlled funding for school districts; local authorities could no longer levy taxes for educational purposes;
2. Setting of average class sizes for elementary and secondary school classes—now, possibly, there might be greater numbers of students in various classrooms throughout both elementary and secondary schools, with the further implication that inequities might be created in certain districts;
3. Removal of administrators from the union—administrators were now to be designated as managers rather than curriculum leaders in the school;
4. Reduction of paid preparation time and increase in number of classes taught per day by secondary school teachers;
5. A clause nullifying all existing contracts between teachers and the boards (local school districts). (Majhanovich, ¶ 10)

In the fall of 1997, in protest to Bill 160, teachers engaged in a 2-week work stoppage.

The stoppage resulted in a strike in which 126,000 Ontario teachers and their principals walked off the job—the largest teachers’ strike ever in North America. The teachers mounted a publicity campaign to inform parents of just what the parents would lose in their neighborhood schools under the restructuring. The parents supported the teachers,

but the teachers could not maintain solidarity because of the make-up of the federations. After 2 weeks, the elementary teachers returned to the classroom. Shortly afterward, and reluctantly, the secondary school teachers also returned.

At that time, there were five separate teachers' federations in Ontario: public secondary school (OSSTF), English Catholic secondary school (OECTA), public male elementary-school teachers (OPSTF), a larger group of public female elementary-school teachers (FWTAO), and francophone teachers (AEFO), plus the umbrella Ontario Teachers' Federation (OTF; Majhanovich, 2002, ¶ 13). In 1998, the new elementary teachers' federation of Ontario (ETFO) was formed, thereby ending the separate men's and women's federations on the elementary school level.

Bill 160 (1997) prevented teachers from negotiating working conditions; teachers thus saw the bill as an attack on teachers' rights to bargain collectively. Local school boards had been reduced in number (from 129 to 72) previously, under the earlier Fewer School Boards Act (Bill 104, a bill introduced to amend the Education Act; 1997). Now, Bill 160 rendered school boards virtually powerless to influence education, and equalized grants across the province without consideration for different costs of living or different populations in different geographical settings across the province (Majhanovich, 2002, ¶ 12).

The new Minister of Education, Dave Johnson, continued to attack the teachers and the unions (Majhanovich, 2002, ¶ 14). Further lockouts and strikes took place in 1998. Bitter feelings resulted as a consequence of these measures and actions. Teachers began to follow strict guidelines of the collective agreement, which meant that they

would arrive at a designated time in the morning and leave the building at a designated time. For the next 2 years, they refused to participate in extracurricular activities.

After they took power in 1997, the Ontario Conservative government removed \$1 billion from the education budget as part of their plan to create a crisis all the while publicly promising only to reduce bloated administrations—not to cut money from classrooms (Majhanovich, 2002). Schools now had to manage their budgets with less money and fewer teachers.

In addition to the government's strategic plan to create a crisis, another variable contributed to the upset in public education. According to Majhanovich (2002), many feared that the real agenda of this government, backed by big business and transnational corporations, was to destroy public education in order to provide privatized technological schools. As a result of centralized control, the Ministry of Education then restructured curriculum, focusing on what students could do at the end of a program, with standardized testing (Majhanovich). Guidance teachers focused on preparation for the workplace and career counseling. The Ministry rewrote curriculum documents based on a uniform template. According to Majhanovich, teachers were not happy.

Further problems continued to develop from underfunding. The government provided a tax credit of up to \$3,500 (Canadian) per year, per child, for parents who wished to enroll their children in private schools (Majhanovich, 2002). The justification for such a tax credit was to provide parents with greater choice, but the teachers' unions and other parent associations pointed out that every tax credit of \$3,500 for private schools would remove the same amount of grant money from the public system, further

impoverishing the struggling public schools. As a result of the government's top-down restructuring, teachers needed time to understand the impact of the changes on curriculum. They required curriculum resources in order to support changes in curriculum.

In 1999, the Conservative government was elected again. In May 2000, the government introduced Bill 74, which passed into law in June of that year as the Education Accountability Act, 2000. It tightened Bill 160 (1997). Bill 74 defined the number of courses a high school teacher could teach, legislated a new average class size in elementary and high schools, and established requirements for teachers' participation in extracurricular activities as well as other mandates. Bill 74's changes affected principals as well as teachers. Principals became even more unhappy about their role as managers, which had been created by Bill 160 (Majhanovich, 2002). One example of their discontent involved the power that they now had to assign extra duties to teachers. Overall, controversies surrounding the legislation (Bills 160 and 74) that centralized the power for decision making over education to the provincial Ministry of Education and Training, taking it away from school boards and teachers, illustrate how control over teachers and what they teach had been tightened.

Over the next five years controversies continued to emerge. In June 2006, a newly elected Liberal government Bill 78, the Student Performance Bill, to amend the Education Act. It encouraged consultation with boards and other partners to determine clear educational outcomes for all constituents (Blazina & Despault, 2006). As well, in 2006–2007, as part of a recruitment initiative for new teachers, the Liberal government

introduced the New Teacher Induction Program (NTIP) in order to demonstrate support to new teachers. The Ontario College of Teachers Act, 1996 (1996) underwent changes to ensure that the Ontario College would be self-regulated by the teachers, by stipulating a majority of classroom teachers on its council. These amendments supported the government's Excellence for All commitment that set the highest standards for teachers so that they could earn respect.

Problem Statement

Educational policy, combined with political restructuring introduced by successive Conservative and Liberal governments in Ontario, underwent significant changes throughout the 1990s and into the 21st century. These changes have created problems for educators in Ontario. Since the 1980s, teachers' unions have gained power through collective bargaining. This gain in power has brought frustration to administrators (Wang, 2004).

Bill 160 (1997) removed Ontario administrators from participating in teachers' unions; the administrators saw this as a means to create separation between school administrators and teachers, and the result was low morale on the part of administrators and teachers (Trute, 1999). Shantz (2002) believed that the removal of administrators from the union created an "unhealthy gap" between administrators and teachers, and that the Ontario government had created a crisis that in turn created unhappy teachers with low morale.

According to a poll conducted in 1990 by the Carnegie Foundation for the Advancement of Teaching (as cited by Abbott, Chisholm, & Rose, 1994), teacher morale

in the public system was low. The poll revealed that 61% of elementary and secondary school teachers indicated that morale was low due to a belief that the public school system did not meet the needs of its students. As well, 96% of the elementary and secondary school teachers indicated that lack of funding forced teachers to spend their own money on classroom supplies. Abbott et al. felt that pressures on the school system were likely to increase in the future. Yet, to date, little research measuring the effect of teachers' unions on the morale of schools and their administrators has been available.

In order to provide data as to the impact on the relationship between administrators and teachers, the Ontario Principals' Council (OPC) documents communication from administrators who may experience difficulty with teachers' unions. During the 2006–2007 school year, the OPC responded to 88 phone calls from administrators regarding relationships with unions. The OPC Education Leadership Representative of Canada stated in an interview, "There are many more that have not been documented but are out there" (personal communication, July 15, 2006).

According to Urbanski (2003), where there is no collaboration between the constituents, the traditional industrial union model promotes a competitive scenario. Urbanski has noted that adversarial collective bargaining has been the norm of the relationship between teachers' unions and administrators for 3 decades in the United States. In Canada, even though the relationship between teachers' unions and administrators has been collaborative at times, adversarial feelings have existed since the removal of administrators from the union as a result of Bill 160 (1997).

Opinions about teachers' unions are also deeply divided (Wang, 2004). The public views teachers' unions as obstacles to educational reform (Fullan, 1998a; Kerchner et. al., 1998; Lieberman, 1997; all as cited in Wang). As a result of the perceived interference from teachers' unions, the public feels that administrators are restricted in providing the best leadership possible (Haar, 1998; Lieberman, as cited in Wang).

Overall, collective bargaining has affected the relationship between administrators and teachers' unions in Canada and the United States. With the removal of administrators from the teachers' unions in Ontario as a result of Bill 160 (1997), there has been concern about morale of administrators and teachers. Therefore, the problem is that, while we know that collective bargaining has affected the relationship between administrators and teachers' unions in Canada and the United States, we do not know how the removal of administrators from the teachers' unions in Ontario as a result of Bill 160 has affected administrators' and teachers' morale.

This leads to one potential area of social significance: If the removal of administrators from the teachers' unions in Ontario is seen to have affected administrators' and teachers' morale, Canadian teachers might wish to have the option of choosing whether to belong to a teachers' union, as teachers do in the United States. Currently, their union membership is mandatory.

Nature of the Study

Hypotheses

The hypotheses for this study evolved through the literature review process. The literature revealed no clear answer as to what does not constitute union impact, nor is there any conclusive correlation between morale and perceptions of union impact. Additional information was needed, to understand how perceptions of union impact may influence morale. Three hypotheses were tested for this study:

Null Hypothesis 1

H₀: The average morale score (MOR) is the same for public school teachers and administrators (ROLE) in Canada.

Hypothesis 1 was tested using a two-sample *t* test. If the *t* test is statistically significant, then it can be concluded that the average MOR was different for teachers and administrators. The size of the difference between teachers and administrators can be demonstrated by reporting the average and standard deviation morale scores separately for teachers and administrators.

Null Hypothesis 2

H₀: There is no correlation between the morale score (MOR) and the learning environment score (LE).

Hypothesis 2 was tested using Pearson's correlation coefficient, which measures the strength and direction of linear relationship between two measures. If the Pearson correlation coefficient is statistically significantly different than zero, then the null hypothesis can be rejected and it can be concluded that there was a relationship between

MOR and LE. If the sign of the correlation coefficient is positive, then it can be concluded that higher MOR scores were associated with higher LE scores, while lower MOR scores were associated with lower LE scores. If the correlation coefficient were negative, then it would be concluded that higher MOR scores are associated with lower LE scores while lower MOR scores are associated with higher LE scores.

Null Hypothesis 3

H₀: When controlling for the learning environment (LE), there is no difference in the level of morale (MOR) between public school teachers and administrators (ROLE).

Hypothesis 3 was tested using multiple linear regression. The dependent variable in the regression model was the MOR score. The independent variables were ROLE and LE. Both independent variables were entered into the model simultaneously. The equation of the model was reported and the statistical significance of the model parameters evaluated. If the regression coefficient for ROLE was statistically significant, then the null hypothesis can be rejected and it can be concluded that even after controlling for LE there was a difference in the MOR between teachers and administrators. Statistically significant regression coefficients were interpreted. The *R*-square for the final model would be presented and interpreted.

Statistical Measures

Independent Variables

Independent variables are the variables that are controlled by the researcher. They usually consist of the two (or more) treatment conditions to which the participants are exposed.

Role (ROLE). This was measured on a categorical scale. The study participant's academic role was recorded as either teacher or administrator.

Perceived union impact (PUI). This score was measured on a continuous scale with a range of 1–4. The score was computed as the average of Questions 1–20 on the Learning Environment (LE) questionnaire. The researcher chose to label the questionnaire “Learning Environment” in order to keep the questionnaire more neutral, as labeling the questionnaire “Perceived Union Impact” might evoke biased responses to it. *Union impact* refers to any condition which exists as a result of the teachers' union actions that might adversely impact the learning environment. Lower scores indicated an academic staff member who perceived less union impact while higher scores indicated an academic staff member who perceived more union impact.

Dependent Variable

The dependent variable is the one that is observed for changes in order to assess the effect of the treatment.

Morale (MOR). This score was measured on a continuous scale with a range of 1–4. The score was computed as the average of Questions 1–61 on the Teacher/Administrator Morale questionnaire. Questions 1, 4, 5, 7, 9, 13, 18, 22, 23, 25,

30, 32, 40, 44, 52, and 54 were reverse-scored prior to calculation of the morale score. Lower scores indicated an academic staff member with low morale while higher scores indicated an academic staff member with high morale.

Purpose of the Study

The purpose of this quantitative survey study was to determine if there is a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable).

Theoretical Frameworks

The theoretical frameworks for this study focused on three theorists: Schön's (1987) learning, reflection, and change theory; Argyris' (1999) organizational learning theory; and Senge's (2006) systems theory. As this study dealt with hypotheses about perceived effects of teachers' union actions on administrators' and teachers' roles and morale, Argyris' and Schön's double-loop theory (1974) as well as Senge's systems thinking served as theoretical frameworks in understanding the relationship between administrators and teachers' unions.

Organizational evolutionary theory discusses incremental change in learning as "single-loop learning," wherein change occurs within unquestioned assumptions (Argyris & Schön, 1974). Argyris and Schön's "double-loop learning" theory focused on solving complex problems by attempting to change underlying values and assumptions. This learning theory questions and changes assumptions, which results in different ways of

doing things. It is a theory of personal change that focuses on professional education, especially leadership in organizations.

Schön (1987) developed two theories of action congruent with his and Argyris' double-loop learning theory (Argyris & Schön, 1974). *Theories-in-use* describes theories implicit in what we do as practitioners, while *espoused theories* describes the words we use to convey what we do, or what we would like others to think we do. Interaction and relationships with others are necessary to identify this distinction. The action theory learning process involves four steps: researchers attempt to discover existing theories, invent new meanings, produce new actions, and generalize the results. In double-loop learning the researcher applies each of these steps, detects errors, and corrects them, so that an organization's underlying norms, policies, and objectives are modified. The result should be increased effectiveness in decision making, through what Schön discussed as *reflection-in-action* and *reflection-on-action*. The former is thinking on one's feet, where the latter enables the learner to reconstruct past events.

While both Argyris (1999) and Schön (1987) focused on learning theories, Senge (2006) focused on systems thinking in a learning organization. Systems thinking addresses the whole versus the individual parts of the organization and focuses on the long-term view. Senge discussed four other disciplines: personal mastery, mental models, building shared vision, and team learning. Personal mastery promotes lifelong learning. Mental models are ingrained assumptions and images that influence how we understand the world; building shared vision encourages innovation and promotes a shared picture of

the future. Team learning builds on personal mastery and shared vision. Dialogue is critical to promote Senge's effective system thinking.

The theoretical frameworks of Argyris (1999), Schön (1987), and Senge (2006) provided the foundation to explore the relationship between perceived union interference and morale. Both administrators and teachers work in an organization where learning to work effectively together is critical.

Operational Definitions of Terms

The following definitions were used in this study:

Administrators. In Ontario schools the term *administrators* is interchangeable with the term *principals*. This may not be the case in the United States.

Adversarial bargaining. Adversarial bargaining is a type of negotiation process based upon the industrial union model and involves a perceived conflict of interest (Kearney, 1992, as cited in Bernstein, 2003).

Collaboration. Collaboration is a:

purposeful relationship in which all parties strategically choose to cooperate in order to accomplish a shared outcome. Because of its voluntary nature, the success of collaboration depends on one or more collaborative leader's ability to build and maintain these relationships. (Rubin, 2002, p. 17)

Community of practice. Community of practice defines "groups of people who share a concern, set of problems, or passions about a topic" (Wenger, McDermott, & Snyder, 2002, p. 4).

Professional unionism. In professional unionism, unions strive to represent the profession—as well as professional workers—by combining traditional concerns for

teachers' rights, wages, and benefits with concerns for educational improvement (Boyd, Plant, & Sykes, 2000, and Kerchner & Koppich, 1993, as cited in Bernstein, 2003).

Reform. Reform generally refers to changes in the structures of public schooling and the delivery of instruction. Reform in the context of this study refers to changes in the educational system as they relate to the complexity of the work of teaching, the role of the teacher, and the profession of teaching (Kerchner & Koppich, 1997, as cited in Bernstein, 2003).

School districts/boards. The Ontario term *school boards* refers to what are called school districts in the United States. These two terms are interchangeable for the reader's purpose.

TURN. The Teacher Union Reform Network (TURN) is a union-led effort to restructure teachers' unions to help promote the kinds of reforms that will eventually lead to better learning and higher achievement for all students. TURN's intended goal is to explore, develop, and demonstrate models that lead to restructuring of unions so that they will become more responsive and responsible in organizing around projects designed to improve student learning (TURN, 1998, as cited in Urbanski, 2003).

Unionism. Unionism is a normative idea that "provides the central identity which guides action and stimulates response" (Kerchner & Mitchell, 1988, as cited in Bernstein, 2003).

Unions. Unions are organizations that engage in collective bargaining. "Historically and functionally unions have engaged in a much broader set of activities: protective legislation, standards setting, employee education, apprenticeship, testing and

certification, and electoral politics” (Kerchner & Mitchell, 1988, as cited in Bernstein, 2003, p. 12).

Assumptions

The following assumptions regarding this study are:

1. The respondents were honest in their responses.
2. The sample population preferred to answer an anonymous survey online through Survey Monkey without any identification of who the participants were.
3. The researcher conducted the study and was aware that the results could not reflect any personal bias.

Scope and Limitations

The study focused on Canadian administrators and teachers as its scope or delimitation. Based on a statistical power analysis, the researcher planned to analyze data from approximately 50 administrators and 50 teachers, using an online survey. The study’s hypotheses dealt with whether there was a relationship between perceived effects of teachers’ union actions on administrators’ and teachers’ roles and administrators’ and teachers’ morale. The following limitations are acknowledged:

1. The study will not be generalized to all districts in Canada.
2. Members of the Canadian Education Association might not represent all teachers and administrators in Canada and perhaps those who chose to respond might not be representative of all members of the association.

3. The researcher used a convenience sample of voluntary participants. Therefore projected data beyond the sampling are inappropriate because of the convenience sample.
4. The researcher's personal feelings about the topic of perceived effects of teachers' union actions on administrators' and teachers' roles and morale may tend to be biased because of the sensitive nature of the topic.
5. Two different organizations were selected for this study to broaden the scope. One organization would not provide enough individuals to survey.
6. Demographic information except for role of participants is not included in the survey instruments. There was no mention of gender or ethnicity.
7. The statistical data provided means and frequencies data.
8. The study made the assumption that both administrators and teachers were honest when they responded to the questionnaires. Yet this could also be a limitation, if participants chose not to be honest.
9. In addition, certain administrators might possess biases based on personal experiences.
10. The sample might not have been representative of only participants in Ontario as a result of implementing the Survey Monkey tool.

Significance of the Study

The data collected and analyzed during this quantitative survey study determined if there is a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles and administrators' and teachers' morale.

In the United States, Urbanski (2003) studied relationships between administrators and teachers' unions in situations where administrators were attempting to work with the union, not against it. Collaboration was important, as union leaders attempted to partner with and develop trust in working with administrators. Trust and cooperation needed to replace the mistrust and hostile relationships from the past. Unions and management needed to go beyond the traditional bread-and-butter issues, expanding such areas of school reform as student assessment, professional development, and peer evaluation.

Since there has been no similar significant research in Canada on this topic, researchers will appreciate the significance of the data as they pertain to school districts throughout Canada. The theoretical frameworks—Argyris and Schön's (1974) double-loop theory and Senge's (2006) systems theory will help educators (including administrators and teachers) and political leaders to understand the importance of relationship in the bigger picture of the learning organization. Globally, these theoretical frameworks can apply to any organization where there needs to be a sense of stability.

Social Change

This study was intended to bring about social change in the province of Ontario with respect to elementary school administrators and teachers. Labor relations in Ontario schools have created a negative climate as a result of Bill 160 and the removal of administrators from the teachers' unions (Protective Services Consultant, Ontario Principals' Council, personal communication, November 5, 2007). The morale of teachers and administrators needs to improve.

As indicated in the significance of the study, Urbanski (2003) studied the relationships between administrators and teachers' unions. He introduced the concept of the Teacher Union Reform Network (TURN), which focused on moving beyond the interest-based model of collective bargaining. Theoretically, the urban school districts and teachers' union needed to develop strategic objectives and engage in joint problem solving. By including educational and instructional issues, TURN negotiated a living contract that included a commitment to view collective bargaining as collaboration rather than positional, adversarial fights. As they prioritized the needs of students, they decided to use the collective bargaining process to encourage more effective schools and an authentic profession for teachers so that they were recognized in a positive manner (Urbanski).

The Urbanski research and TURN could serve as a model for Ontario. It is hoped that the Ontario government will review this study's findings and support both administrators and teachers in developing policies to build collaborative working relationships, much as the Urbanski research has influenced union relationships in the United States. Specifically, perhaps the most significant social change might be that teachers have the option of belonging to a teachers' union in Ontario as they do in the United States.

Summary and Organization of the Remainder of the Study

The purpose of the study was to determine if there is a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles and administrators' and teachers' morale.

Section 1 discussed historical and political perspectives, significance of the study, theoretical perspectives, hypotheses, limitations, assumptions, and operational definitions.

Section 2 consists of a review of literature on morale, administrator roles, teacher roles, teacher/administration relations, and labor/management relations. The review draws upon articles, studies, dissertations, and books that describe and analyze various aspects of the relationship between morale, teachers, and administrators.

Section 3 describes the design of the study including the target population, sample, and instrument to collect data and procedures, and the data treatments. Section 4 is an analysis of the data as they relate to the hypotheses. Section 5 presents a summary, interpretation of the findings, implications for social change, recommendations for action, recommendations for further study and a concluding statement.

SECTION 2:

LITERATURE REVIEW

Section 1 reviewed historical and political perspectives on the purpose of this study, that is, whether a relationship existed between perceived effects of teachers' union actions and administrators' and teachers' roles (as independent variables) and administrators' and teachers' morale (as the dependent variable). When administrators in Ontario were no longer able to belong to the teachers' union after the passage into law of Bill 160 (1997), their role changed from curriculum leader to manager, and adversarial relationships began to develop between them and certain union leaders. Section 2 presents a literature review that focuses on specific themes related to the purpose of the study. The themes discussed are morale, role of the principal, role of the teacher, teacher/administrator relations, and labor/management relations.

In order to conduct the literature review, the author consulted electronic databases, including Proquest, ERIC, and EBSCO. These databases provided information on the themes outlined above, yet they did not provide information on perceived effects of teachers' union actions on administrators' and teachers' roles and administrators' and teachers' morale. There was a gap in the literature with regard to Canadian and Ontario resources, which this doctoral study hoped to fill.

Various methodologies were also reviewed, providing an understanding that each serves a different purpose and provides a different outcome. Researchers need to understand what information they wish to obtain prior to the collection of data. Babbie

(1990) indicated that research methods include analysis of existing data, case study, controlled experiment, and participant observation.

Qualitative research provides information in the form of documentation of real events, records of what people say, observation of behaviors, or study of written documents (Neuman, 2000). On the other hand, quantitative researchers communicate meaning and interpret information by means of numerical analysis. This is accomplished by statistical methods that help to generalize findings. Quantitative researchers take an objective stance regarding participants and their settings, and use sample research to apply their findings to a larger population. In this methodology, the researcher collects data and makes revisions as necessary in order to prove a null hypothesis.

Questionnaires, the chosen methodology for this study, are a quantitative method of obtaining information from participants. Information gathered through this method would be difficult to gather through observation (Thyer, 2001). Information can be obtained by interviews, whether in person (within a group setting or individually), over the telephone, or self-administered. Surveys gather data on attitudes, knowledge, beliefs, and values.

The author researched both quantitative and qualitative methodologies in the literature review based on the following topics: morale, role of the principal and teacher, teacher/administrator relationships, and labor/management relationships.

Morale

Characteristics of Morale

Morale characterizes the quality of academic life in a school and is associated with certain behaviors (Johnsrud, Heck, & Rosser, 2002, ¶ 1). It includes attributes such as satisfaction with the work environment, enthusiasm, loyalty to the institution, and dedication to common goals. Research efforts to measure the morale of administrators are rare (Johnsrud et al). However, Johnsrud et al. identified three sources of frustration for administrators: nature of the administrative role, lack of recognition for contributions, and limited opportunity for career growth. These sources of frustration affected the morale of administrators. Johnsrud believed that when administrators perceived support from their superiors, their morale tended to be higher, and vice versa—if they did not feel recognized for their contributions, their morale tended to be lower.

Morale has consequences for individuals and groups. Johnsrud et al.'s (2002) findings indicated that, initially, morale exists primarily at the individual level. Yet their study suggested the need to explore variables at the institutional level, as there might be differences in group responses versus individual responses. Johnsrud et al. suggested further research on how organizations might affect individuals' attitudes, and the influence that attitudes in turn have upon behavior.

Leithwood and Elementary Teachers' Federation of Ontario (2006; hereafter, Leithwood & ETFO) discussed morale as a sense of trust, confidence, enthusiasm, and friendliness among teachers. They commented on morale as an attitude towards working

conditions, policies, and relationships with subordinates. According to Zigarelli (2006, as cited in Leithwood & ETFO), high teacher morale was associated with student achievement, whereas poor teacher morale was seen in less effective teaching performance, teacher absenteeism, resistance to change, and teacher turnover.

Variables That Affect Morale

Administrators might not be aware of circumstances that cause fluctuations in morale among teachers (Leithwood & ETFO, 2006). To further understand variables that affect morale, administrators need to understand that participation in decision making might have an impact on teacher morale (Jones, 1995). Jones focused on teacher participation in site-based management by implementing a teacher decision-making instrument (TDI) to measure actual and desired participation. Jones' findings indicated that teachers with 20 years or more experience, who were aged 50 years or older and taught primary grades, exhibited higher morale. As an implication, the study demonstrated the need to encourage upper elementary grade teachers to become more involved in decision making.

Another instrument, the Purdue Teacher Opinionnaire (PTO; as cited in Houchard, 2005), has also gauged morale. Houchard implemented it in his quantitative study of principal leadership, teacher morale, and student achievement in North Carolina. Findings indicated that there was a moderately high level of teacher morale. Satisfaction with teaching led the way in contributing to higher morale, whereas the issue of salary was found to lower morale. Blackburn and Wilkes (1987) implemented it as a measure

of teacher morale in Mississippi. Findings from Blackburn and Wilkes' study indicated that younger teachers exhibited higher morale than older teachers. Gore (1983) also implemented the PTO in Tennessee to measure teachers' morale level. Gore tested four hypotheses. There was no significant difference in morale between male and female teachers, no significant difference in the various areas of Tennessee, and no significant difference in levels of degrees between teachers. A significant difference showed that older teachers responded more positively to morale incentives than younger teachers did.

Further reinforcing the importance of experience as a variable when measuring teacher morale, Bivona (2002) discovered that teachers with more than 10 years of experience had more positive attitudes toward teaching than did less experienced teachers. Experienced teachers spent less time on school-related activities after school. As a suggestion, Bivona felt that less experienced teachers could raise their morale, lessen their workload, and become more effective if they were to network with veteran teachers.

Principals are able to create an environment in which high levels of student learning and high staff morale are both supported. Thus, no matter what their level of experience, principals need to balance high-stakes testing and accountability with appreciation of teachers (Protheroe, 2006). Staff morale, according to Protheroe, is a variable that needs to be addressed in education. Perie and Baker's examination (as cited in Protheroe, 2006) of the large-scale teacher surveys conducted by the National Center for Education Statistics found high morale in schools where teachers felt supported and

autonomous. New and experienced teachers alike expressed the need to be recognized for their work and to be involved in decision making. A North Carolina study (Hirsch, as cited in Protheroe, 2006) found that school leadership was critical for positive working conditions. Protheroe suggested that principals understand people, recognize staff, provide resources, and keep stressors to a minimum. Protheroe shared Johnsrud et al.'s (2002) findings that recognition of work was a morale booster.

In the literature, morale is seen to be affected by independent variables (Postell, 2004). Postell conducted a survey of teacher morale and created a model for enhancing morale at a middle school that was experiencing high teacher attrition. The study demonstrated the common thread of the impact on morale of appreciation. Many teachers reported more job satisfaction and higher morale, yet others chose not to return to the school the following year. Teachers felt that when they were evaluated, the evaluator needed to appreciate them as well. Strategies for increasing morale included administrative support, collegiality, reduction of nonteaching duties, teacher recognition, and appreciation.

The theme of morale focused on several variables from the perspective of the individual. Recognition and appreciation, along with years of experience, might impact morale of individuals.

Role of the Principal in Ontario

The duties and powers of principals are described in the following Ontario legislation: the Education Act (1990) and regulations; the Teaching Profession Act

(1990); Ontario College of Teachers Act, 1996 (1996); and various other guidelines (as cited in Elder, 2000a). Within the legislation, duties are defined using terms such as *must* and *shall*, whereas powers are defined using *may*. Principals have the authority to decide whether they wish to exercise these powers—which include networking with the school attendance officer, for example—or not. Other categories of responsibilities exist, including duties principals need to perform as teachers under the Education Act and regulations. The categories are pupil discipline, pupil safety, pupil instruction, special education, pupil supervision, staff supervision, staff evaluation, staff cooperation, staff safety, school administration, access to school, reports to Ministry, building maintenance, community, school council, reports to Board, and standards for conduct by principals.

While the roles of principals in Ontario public schools are described by the Ontario Ministry of Education and defined by the terms and conditions of their employment with their school boards, the roles remain somewhat ambiguous. The ambiguity arises from the legislation that suggests guidelines that individual principals and teachers' unions interpret as they wish to interpret. Through the massive restructuring of Ontario educational legislation and policies of the 1990s discussed in section 1, relationships between teachers and principals were altered and also remain ambiguous. For example, a study conducted by Castle and Mitchell (2001) for the Ontario Principals' Council on the roles, tasks, and tensions of elementary school principals in Ontario found that the role of the principal is not well understood. The theoretical underpinnings of Castle and Mitchell's study focused on: (a) role ambiguity over primary functions of the

principal with emphases on managerial, instructional, transformational, or other leadership areas; (b) decision ambiguity; (c) authority ambiguity; and (d) complexity dilemmas, direction dilemmas, and accountability dilemmas. Castle and Mitchell obtained qualitative data through semistructured interviews, observations, narratives, and focus group sessions to elucidate the roles and tasks of principals. Five key roles of principals were identified: task management, relationship building, accommodating special needs, mentorship, and direction setting. Three key characteristics of a principal's environment were a highly fragmented workday, the need to multitask, and complexity. Four key areas of conflict were also identified: managerial demands versus instructional leadership, responsibility versus authority, change versus stability, and relationship building versus control of personal work environment. In order for principals to minimize these conflicts, they needed to delegate responsibilities (Castle & Mitchell).

In a capacity-building model of professional learning, Castle and Mitchell (2001) laid out five key roles principals needed to play in order to facilitate collaborative inquiry and build a professional learning community: accept tension and deal with conflict; model collegiality and experimentation; focus talk on action; help teachers to frame their inquiry; and connect action with student learning. In the study, principals were seen as facilitators of a process of collaborative inquiry, problem solving, and school development. The study indicated that principals needed strategies from the Ministry in order to effectively implement new initiatives that would improve student learning.

Manager or Leader

The conflict between change and stability could be lessened if the leadership role were shared in developing school improvement initiatives. Phillips, Raham, and Renihan (2003) suggested that to do this, the role of the principal could be transformed from *building manager to leader of learning*. As leaders of learning principals would analyze data, assess teachers, initiate changes in curriculum, encourage shared decision making, and energize the school community around the goal of higher student achievement. Principals would need to abide by a mandate of continuous improvement in a context of complex societal and educational change. In the view of Phillips et al., principals as leaders of learning would need quality preparation, professional development, and administrative support.

However, even if administrators became leaders of learning, they would still be managers. MacMillan, Meyer, and Sherman (2001) completed three studies to gain knowledge of what is important in the role of principal. In the studies, administrators identified the following as important: managerial functions, curriculum and instruction, supervision of instruction, personnel management, professional development, contractual issues, and other responsibilities. According to MacMillan et al., the role of principal was continuing to change; principals needed to become change agents, leaders in areas of instruction, and leaders both inside and outside of the school. The principal's role would therefore include proficiency in communication and interpersonal skills, organizational abilities, curriculum knowledge, and responsibility for professional development. The

studies recommended that instructional leadership needed to reflect the realities of the role, and principals required new management skills to support school productivity.

Principals as Change Agents

After the introduction of Bill 160 (1997) and Bill 74 (2000), principals began to facilitate changes, as they now had the responsibility for assigning extra duties to teachers, dealing with reduced budgets, and introducing a New Teacher Induction Program (2006).

As suggested by MacMillan et al. (2001), Ontario principals needed to become change agents, whether in their role as manager or as leader. McLaughlin and Hyle (2001) also addressed the issue of facilitating change in a paper presented at the American Educational Research Association Annual Meeting. In the paper, detailing an explanatory, qualitative, single-site case study, staff perspectives on the principal's consideration of the needs of individual teachers were examined when implementing school-wide change. Data collected from interviews, observations, and a review of documents were instrumental in discussing the findings from the study.

Citing Fullan (1991), McLaughlin and Hyle (2001) found it necessary to look for change first at the interpersonal level, as change was seen to occur within individuals, with all their differing perspectives. Fullan (as cited in McLaughlin & Hyle, p. 5) investigated how a principal creates a context for change, how school culture might be acknowledged as part of the process, if and how the principal addresses individuals before considering the system, and other realities. Fullan linked the role of principal as

change agent to a process of self-reflection; principals need to reflect on their own bias in the role of administrator as change agent, as perceptions of the change process on the part of the administrator can affect the entire organization. For Fullan, change in oneself is seen to precede change in others.

Acknowledging the process of self-reflection on the part of principals, the researchers discovered through data analysis that participants in McLaughlin and Hyle's (2001) study viewed the change process as a team effort with the principal as a facilitator and teachers as communicative participants. The participants viewed the principal as the key change agent who created a context for change.

School Climate and Principals' Leadership Qualities

As change agents, principals reflect on the leadership styles necessary to produce the optimal learning climate in their buildings. Kelley et al. (2005) researched school climate and compared relationships between selected dimensions of leadership and measures of school climate in a Likert-type survey conducted in 31 elementary schools in the state of Nevada. They cited Hoy and Miskel's (in Kelley et al., ¶ 12) definition of school climate as different characteristics from one building to another that influence behavior with regard to staff performance, promotion of higher morale, and improvement of student achievement. They also cited Kottkamp's (1984) definition of school climate as consisting of shared values and commonly held definitions of purpose. Results indicated that teachers' perceptions of their principals' effectiveness were related to school climate. If teachers perceived that their principals acted appropriately in situations

then they indicated that the school had such commonly held definitions of purpose as good communications, high level of advocacy for teachers, and participatory decision making.

To support advocacy for teachers, McLaughlin and Hyle (2001), who adapted Schön's (1987, as cited in McLaughlin & Hyle, p. 5) concepts of principals as coaches and teachers as students, perceived principals as facilitators of dialogue and teachers as communicative participants. Principals in this perspective would stress teamwork and collaboration while simultaneously dealing with individuals. With these processes in place, optimal conditions for successful coaching could then be created; staff could then address problems, prioritize the needs of students, and build relationships (McLaughlin & Hyle, p. 6). Such conditions could also create a climate of open communication and respect for one another.

In creating a climate of open communication and respect for one another, all principals share certain characteristics that contribute to leadership. According to Lambert's (2005) study of leadership capacity in American and Canadian schools, these characteristics included self-reflection, the ability to develop capacity, and a sensitivity to others. Lambert outlined three phases in building leadership: instructive, transitional, and high capacity. In the instructive phase, a period of organization begins as a school initiates new collaborative processes. Principals meet some resistance and yet demonstrate assertive leadership. In the transitional phase, the principal releases some authority while providing support. A challenging aspect of this phase is the need to break

through dependencies; principals need to hand decisions and problem solving back to the teachers. Principals also need to demonstrate a delicate balance—coaching and leading teachers while at the same time delegating responsibilities to them (Lambert, ¶ 23). In high leadership capacity, principals take a lower profile and focus on facilitation rather than dominance. Teachers initiate actions, take responsibility, and identify crucial questions about student learning. During this phase, principals and teachers become more alike than different; a leveling of the relationship occurs.

As high leadership capacity becomes a reality in schools, a different, more interdependent character develops in schools. Overall, when teachers realize that the principal does not have all the answers, they increase their participation. They find leadership in one another and tap into mutual authority, expecting each other to identify problems. In a school characterized by high leadership capacity, the principal: “(a) learns continually, (b) thinks strategically, (c) is value- and vision-driven; and (d) continues and expands behaviors initiated in earlier phases” (Lambert, 2005, ¶ 34). As principals participate with other members to build interdependency, they will use their formal authority when needed, to mediate political conflicts, work with less-than-competent staff, and deal with reform challenges.

In order to measure leadership styles, Blanchard, Hambleton, Zigarmi, and Forsyth (as cited in Kelley, Thornton, & Daugherty, 2005) developed the Leader Behavior Analysis II (LBII). The Leader Effectiveness Scale (EEF), one of the primary scores of the LBII, represents the degree to which a leader implements the most

appropriate response in each situation. In Blanchard et al.'s view, a flexible leader implements a variety of different styles to solve problems; a less flexible leader uses a limited number of styles to solve problems. Blanchard et al. administered a questionnaire on school climate, the Staff Development and School Climate Assessment Questionnaire (SDSCAQ, adapted from Zigarmi & Edeburn, 1980, as cited in Kelley et al.). The results of that study in 31 elementary schools—where principals and 1 teacher responded to the LBAll and 4 different teachers responded to the SDSCAQ—were collected using a statistical method entitled Pearson Product-Moment Correlations to determine the relationships between variables. Significant positive relationships were found to exist between teachers' perceptions of their principals' effectiveness scores and all six climate scales. The corresponding correlations between teachers' perceptions of principals' flexibility scores and measures of climate were all found to be negative.

Overall, the role of principal in Ontario is complex. Leadership styles along with school culture and school climate have the ability to enhance the role of principal.

Role of the Teacher in Ontario

As this study was undertaken in Ontario, it is appropriate to focus on the rules and regulations governing the province of Ontario. Like principals, teachers need to abide by legislative Acts and regulations (Elder, 2000b) and operate within the duties and powers laid out therein, yet no role in education works in isolation.

In Ontario, teachers' duties and powers are described in the following pieces of legislation: the Education Act (1990) and regulations; the Ontario Teachers' Pension Act

(1990); the Teaching Profession Act (1990); the Ontario College of Teachers Act, 1996 (1996); and various other guidelines (Elder, 2000b). Within the legislation, duties are defined using terms such as *must* and *shall*, whereas powers are defined using *may*. There exists some discretion with the word *powers*, in that teachers have the authority to decide whether they wish to exercise those powers or not.

According to the Ontario College of Teachers Act (OCT) (1996), teachers are responsible for preparing lesson plans and teaching classes; encouraging students in their studies and evaluating student work and progress; supervising students; behavior and maintaining classroom discipline; demonstrating good citizenship and respect for all groups of people; and acting as teacher-advisers. For students in Grades 7 to 11, for example, this would include helping students complete their annual education plans, and monitoring their school performance and progress toward their career goals.

According to the Elementary Teachers Federation of Ontario (ETFO) (2007), teachers' responsibilities are distributed under various categories, including: teachers as professionals, teachers as employees, and teachers involved in collective actions. These categories are discussed below.

Teachers as Professionals

Teachers are expected to follow a code of ethics. In particular, they need to be aware of their obligations under the Teaching Profession Act (1990). Section 18(1)(b) of the Regulation under this act provides that:

1. A member shall: on making an adverse report on another member, furnish him/her with a written statement of the report at the earliest possible time and

not later than three days after making the report. It would be unacceptable for a member of the profession to make an adverse report to an administrator of his or her child's school about the child's teacher, unless there is compliance with s.18(1)(b).

2. The teacher would be required to put the report in writing and provide a copy of that report to the child's teacher within 72 hours. Failure to comply with this expectation could result in a complaint to the member's affiliate and possible sanctions. The one exception to this requirement would be if the negative report related to an allegation of sexual misconduct involving a student made by a member against another member.

If a teacher publicly criticizes another teacher, any member of the public may file a complaint with the alleging that such comments were "unprofessional." Also, public comments about teachers, or anyone else for that matter, must not be defamatory.

Teachers as Employees

As employees of the board, teachers have the right to complain about breaches of the collective agreement (ETFO, 2007). Avenues to explore a resolution are set out in the collective agreement (ETFO). These activities are directly related to the employment relationship between the employee and the employer. Teachers need to be cautious about taking part in community action against their employer on issues that involve their own child's education. For example, if the school board made a decision about staffing or school closure that teachers were not happy with because of a perceived impact on their own children, the teachers would have to be cautious about how they advocated for change. Participation in such an activity would need to be professional and appropriate, or the teachers would risk being disciplined for insubordination. While teachers have the right to freedom of expression, they must balance this right against their roles as employees.

Collective Action

The role of teacher is a complex one, as teachers need to abide by policies of their board as well as direction from ETFO. There are occasions when teachers can be vocal in their opposition to their employers without being insubordinate. For example, during collective bargaining, teachers often participate in collective activities, such as wearing appropriate protest buttons or distributing leaflets, as a part of a union-sponsored protest (ETFO, 2007). Such collective actions are legitimate exercises of the union's rights. It is rare that teachers would be disciplined for such collective activity. The same is not true for highly critical public statements instigated by a teacher without union sanction, or advice from the Ontario Principals Council's Professional Relations Services.

Teacher/Administrator Relationships

As this study dealt with hypotheses about effects of perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable), Argyris' and Schön's (1974) double-loop theory as well as Senge's (2006) systems thinking served as theoretical frameworks in understanding the relationship between administrators and teachers. Argyris and Schön provided a theoretical model to help explain the relationship between administrators and teachers' unions. They proposed the double-loop learning theory, which focuses on solving complex problems and attempts to change underlying values and assumptions. Double-loop learning is a theory of personal change that focuses on professional education, especially leadership in organizations. Double-loop learning is

based upon a theory of action outlined by Argyris and Schön. There is a distinction between an individual's espoused theory and the individual's theory-in-use (what he or she actually does). Interaction and relationships with others are necessary to identify this distinction. The action theory learning process involves four steps: researchers attempt to discover existing theories, invent new meanings, produce new actions, and generalize the results. Double-loop learning involves applying each of these steps. Double-loop learning occurs when the researcher detects errors and corrects them, so that there is modification of an organization's underlying norms, policies, and objectives. The end result should be increased effectiveness in decision making.

Peter Senge (2006) focused on systems thinking in a learning organization. Systems thinking addresses the whole versus the individual parts of an organization and focuses on the long-term view. Senge discussed four other disciplines: personal mastery, mental models, building shared vision, and team learning. Personal mastery promotes lifelong learning. Mental models are ingrained assumptions and images that influence how we understand the world. Building a shared vision encourages innovation and promotes a shared picture for the future. Team learning builds on personal mastery and shared vision. Dialogue is critical to promote Senge's effective systems thinking.

The work of Leithwood and ETFO (2006) provides a foundation for understanding administrator/teacher relationships. According to Leithwood and ETFO, working conditions have an effect on morale, and morale in turn is important for good working relationships between administrators and teachers. Good morale (among

beginning teachers especially) is associated with support and encouragement from principals. Good relationships need to include clear communication of expectations, provision of instructional guidance and resources, recognition of good work, and enforcement of student rules of conduct on the part of administrators.

Barth (2002) believed that if one strengthened the relationships, professional practice would improve. He indicated that if relationships between administrators and teachers were trusting and cooperative, then relationships between teachers and students, and teachers and parents, were also likely to be trusting. Similarly, if administrator/teacher relationships were fearful and suspicious, then those qualities would spread in a similar fashion. Barth categorized four types of relationships: parallel play, adversarial relationships, congenial relationships, and collegial relationships. Parallel play is exhibited in a self-contained classroom and isolation. Adversarial relationships do not promote collaboration and sharing. Congenial relationships are friendly. Successful collegiality, the most difficult relationship to establish, is indicated by educators talking about practices, sharing, observing, and promoting each other. Barth suggested that leaders would be able to promote a culture of collegiality by stating expectations, modeling collegiality, rewarding colleagues, and protecting those who engaged in collegial behaviors. Active participants would demonstrate empowerment, recognition, satisfaction, and success.

School Culture

In order to build relationships, school cultures need to be examined as to how they enhance or hinder professional learning (Deal & Peterson, 2004). Shaping culture is even more important because of the focus on standardized testing and accountability. A leader's greatest challenge might be to change an unhealthy school culture into a healthy one (Barth, 2002). Culture exists as a complex pattern of norms, attitudes, beliefs, behaviors, values, ceremonies, tradition, and myths. For Barth, school culture had more influence on learning than anything else; thus, a school's culture could work for or against improvement and reform.

According to Barth (2002), changing school culture required courage and skill on the part of both teachers and administrators. He suggested ways of changing existing school culture and addressing any toxic elements in it, so as not to remain victimized by them. One way he proposed was to discuss the non-discussables—that is, subjects discussed in the parking lot, restroom, or dinner table, but never at a staff meeting. One non-discussable would be the leadership style of the principal; another would be the way decisions were being made. As a rule, the fewer the non-discussables, the healthier the school; the more non-discussables, the more pathology in the school culture (Barth, ¶ 12).

Deal and Peterson (2004) also discussed toxic school culture and the problems of change. Most schools are not universally toxic, but have pockets of negativity. Like Barth, these authors defined school culture as the “set of norms, values, traditions, ceremonies, and unwritten rules of behavior, action, and thinking” (Deal & Peterson, p.

2) in a school. Often the culture is positive, professional, and supportive of change and improvement. Sometimes, however, the culture has developed dysfunctional values and beliefs, negative traditions, or caustic ways of interacting. These are the toxic cultures, and where they exist, people do not enjoy their work and seldom try to improve the environment. Deal and Peterson suggested several strategies to cope with toxicity: Educators could: (a) confront negativity and attempt to redirect the negative energy; (b) promote the positive energy; (c) recruit more positive staff; and (d) reconnect staff to the mission of the school, which is to focus on student learning. According to Deal and Peterson, it is up to school leaders to help overcome negative cultures and to rebuild and reinforce positive, student-focused cultures.

The above research was done in the United States. Researchers have also investigated school cultures in Canada. For example, Bayko (2005) concluded that a principal's key tools for building positive school culture were the language principals used and the relationships they built. School cultures that were positive included a framework that outlined key components in establishing school culture. The study recommended that principals' education programs involve some kind of mentorship so that leaders could have an opportunity to explore theoretical aspects of building school culture.

Collaboration

Researchers have examined the benefits of collaboration in building successful school cultures and relationships between administration and teachers (Bezzina & Testa,

2005; Hargreaves, 2002; Huffman & Jacobson, 2003; Planche, 2004; Wenger, McDermott, & Snyder, 2002; Zepeda, 2004). For example, Planche discussed the complexities of collaboration and collaborative processes in her doctoral thesis, a qualitative study informed by semistructured interviews. She discovered that educators required skill and engagement to work collaboratively in a professional learning community. Tools of effective collaborators included the skills of active listening, facilitating, and guiding collective inquiry. Relational trust was critical for effective collaboration. Ultimately, collaborative leaders needed to empower others to become more reflective and collaborative. When educators were able to work collaboratively, student achievement would be positively affected.

Collaboration became the norm and educators were able to establish schools as learning communities in a case study undertaken in Malta (Bezzina & Testa, 2005). The study highlighted the importance of shared leadership and capacity building. Teachers were involved in policy making and collaboration, and the school was able to become more learner-focused through vision, creativity, sensitivity, and the achievement of agreed outcomes. From the authors' perspective, educational reform depended on the willingness of staff to work together.

As indicated by Planche (2004), trust is critical for effective collaboration where staff continue to work together. Wenger, McDermott, and Snyder (2002) also identified trust as important in relationships created in communities of practice, where groups share

concerns and passions about an issue. In such communities, voluntary members share a sense of belonging and develop new strategies based on collegial relationships.

With sustained improvement as members work collegially, leaders can develop a learning community. A learning community involves teachers and administrators who “seek and share learning, and act on their learning” (Hord, as cited in Zepeda, 2004, p. 144). Zepeda (2004) explored the work of a principal who developed a learning community for adults. Peer-mediated supervision involving inquiry, generative problem solving, dialogue, and reflection provided the foundation for the work. The principal’s efforts were critical in creating the conditions necessary for building the learning community. Trust and rapport were important first steps in building a climate conducive to teacher learning, and the principal also needed to allow teachers to make their own decisions about professional development. The traditional, administratively driven supervision model was replaced with collegial, peer-mediated supervision.

Huffman and Jacobson’s (2003) study focused on the success of a professional learning community in promoting relationships between administrators and teachers’ union leaders. Their research design consisted of a questionnaire of 30 items. The study focused on school climate, and examined how leadership promoted changes to achieve desired results. Their findings indicated that teachers and administrators believed their schools reflected all five of the core processes of a professional learning community, namely:

- (a) Frequent dialogues resulting in meaningful decisions;
- (b) commitment due to decisions based on positive principles;
- (c) safe environment for diversity;
- (d)

understanding of organization's history informs decision making; and (e) democratic organization guided by positive principles, ethics and values. (Huffman & Jacobson, p. 246)

Leaders who exhibited characteristics of a collaborative leadership or transformational style had greater opportunity for success in developing a professional learning community.

Schools that became professional learning communities needed to establish trusting, collaborative relationships as described thus far. Hargreaves (2002) conducted an interview-based study of the emotions of teaching and educational change. He interviewed 50 teachers in 15 varied elementary and secondary schools in Ontario, Canada. Principals identified a sample of four teachers in each of the schools. Teachers described episodes of positive and negative emotion with students, colleagues, administrators, and parents. Interviews focused on reports of emotional relationships to their work, professional development, and educational change, and the findings illustrated that teachers avoided conflict and had not learned how to disagree constructively. The study concluded that if schools were to become professional learning communities, trust needed to be established. According to Hargreaves, betrayal was the major agent that destroyed trust. He explored three forms of betrayal: competence betrayal, wherein there are feelings of being shamed; contract betrayal, wherein one does not meet expectations; and communication betrayal, which is demonstrated by gossip.

Overall, the relationship between administrators and teachers was seen in the literature to depend on collaboration, trust, and a positive learning community.

Labor/Management Relationships

The researcher highlighted the concept of collaboration in building relationships between administrators and teachers. Even though administrators promote collaboration, Hutchison (2007), in her dissertation, explored teachers' awareness of the collaborative relationship between the union and administration. The study suggested that there is little research about the effects of union/management collaborative relationships on teachers and administrators. Her study involved semistructured interviews as she explored how a collaborative union/management relationship affected the teachers' performance. The findings of the study indicated that teachers who were not actively involved in the union were not aware of the collaborative union/management relationship. Yet teachers supported the unions' involvement in school improvement activities. Teachers were aware that the union advocated for their rights and that the union and management could resolve issues through dialogue rather than through confrontation. According to Hutchison, the unions needed to learn from districts where unions experienced successful policy collaboration while maintaining their advocacy role for teachers.

For Hernandez (2000), conflict is a normal part of a work setting and can be perceived as a motivator. Hernandez presented case studies examining relationships between administrators and teachers' union leaders. The case studies focused on collaborative strategies—specific skills and tools—for administrators who were working with faculty unions. Training was offered for both administrators and union representatives on improving communication skills. Ultimately, according to Hernandez,

one needed to work on building trust and listening to staff. A positive attitude was critical as administrators learned to work with the union and not against it.

Urbanski (2003) studied relationships between administrators and teachers in situations where administrators were attempting to work with the union, not against it. Collaboration was important, as union leaders attempted to partner with and develop trust in working with administrators. Trust and cooperation needed to replace the mistrust and hostile relationships from the past. Unions and management needed to go beyond the traditional bread-and-butter issues, expanding into such areas of school reform as student assessment, professional development, and peer evaluation.

Teacher Union Reform Network

In the United States, Urbanski (1998) implemented the concept of a Teacher Union Reform Network (TURN) in 1995. TURN was to be a coalition of progressive local teachers' unions from the American Federation of Teachers as well as from the National Education Association. Supported by an initial grant from the Pew Charitable Fund and in collaboration with the University of California, TURN adopted this mission statement:

Teacher unions must provide leadership for the collective voice of their members. Teacher unions have a responsibility to students, their families, and to the broader society. Teacher unions are committed to public education as a vital element of American democracy. What unites these responsibilities is our commitment to help all children learn. (Urbanski, ¶ 25)

TURN's goal was to explore, develop, and demonstrate workable models that would lead to successful restructuring. Urbanski believed that "real change is real hard and takes real time" (¶ 33). In his opinion, change was inevitable. History demonstrates

that cultural change comes from an adaptation to a changing environment. Change must be embraced fully by teachers and administrators at every level of education. Teachers must see themselves as agents of change. Teachers' unions need to seek union reform and school reform to help diminish the isolation among teachers, thus improving collaboration, communication, and learning about reform; to encourage initiative from teachers and their unions (Urbanski, ¶ 13).

According to Urbanski (2003), TURN's focus was to move beyond the interest-based model of collective bargaining. Theoretically, the urban school districts and teachers' union needed to develop strategic objectives and engage in joint problem solving. By including educational and instructional issues, TURN negotiated a living contract that included a commitment to view collective bargaining as collaboration rather than positional, adversarial fighting. As they prioritized the needs of students. They decided to use the collective bargaining process to encourage more effective schools and an authentic profession for teachers so that they were recognized in a positive manner (Urbanski).

Urbanski (1998) said that good systems and good relationships needed to be built by seeking common ground. Shanker (1998, as cited in Urbanski, 1998), in a speech to the American Federation of Teachers, reminded teachers that they depend on their students' successes so that teachers are recognized as being successful. (¶ 32).

The Canadian Perspective

The researcher reviewed literature on building systems and relationships between unions and administrators in the United States. Canadian research has also dealt with this relationship (Litzcke, 2001; Naylor, 1997; Poole, 2002). Poole examined the involvement of teachers' organizations in educational reform in the 1990s, through the lens of constructivism and organizational evolution. The organizations applied experience-based reactive responses as well as proactive continuous improvement of past practice. The reactive stance resulted when the union felt attacked.

Poole's (2002) study involved a comparative case analysis with teachers' union representatives from the Nova Scotia Teachers Union (NSTU) and the Connecticut Education Association (CEA). Data were collected through semistructured interviews and documents. Results from the CEA discussed new unionism where teachers were involved in non-reactionary decisions at the school including peer assistance, curriculum development, and reforms. It was evident that teachers' union leaders began to question assumptions and explore new ones.

The reality existed that union leaders operated under certain constraints when attempting to change union culture. Reciprocal reconstruction of management behavior was an expectation of the union, if they were willing to change. Partnerships with policy-makers, administrators, school boards, and teachers' unions could hopefully achieve meaningful educational reform.

Litzcke's (2001) literature on the concept of TURN reflected the American perspective and questioned the possibility of a TURN satellite in Canada. She stressed that Canadians had limited autonomy (Litzcke, p. 45). There have been major social and economic transformations in Canada. Litzcke believed that Canadians might be able to transcend traditional assumptions about the adversarial nature of education labor relations despite differences in labor history between the United States and Canada. Teachers' union membership in Canada is mandatory while in the United States it is optional and in some states there is no obligation to pay union fees if a teacher refuses to join. Canadian teachers have no choice of representation while teachers in the United States have two national unions, although only one is the official bargaining agent. According to Litzcke, American union leaders may be more aware of the needs of their teachers.

The challenge lies in creating conditions whereby unions are willing and enabled participants in reform. Canada and the United States differ in school governance, union structures, and the economic climate (Litzcke, 2001). Both share in the themes of accountability and school choice yet in Canada most educational reforms have been in favor of the union and not collaborative.

According to Litzcke (2001), there will always be the following questions: "(a) Could TURN be possible in Canada? (b) Could teachers' unions become constructive players in educational reform? (c) Would it pay dividends in our system?" (p. 51). Her response is that it is a good philosophy yet would possibly need to have modifications in order to succeed in Canada.

Litzcke (2001) asked the following questions:

1. What changes are necessary in our educational environment to trigger a response other than “business as usual” from teachers’ unions?
2. What is the role of governments and other players in bringing these conditions about?
3. What tools do unions need to become positive players in education reform?
4. How can their leadership capacity be harnessed for the good of students while they represent teachers?
5. How might Canadian teachers’ unions help teachers think about school change focused on improving achievement? (p. 52)

Other studies of the relationship between administrators and teachers’ unions complement Litzcke’s work. Naylor (1997), from British Columbia, commented on teachers’ unions in North America as now having a multiplicity of roles. His suggestions for the unions: (a) reduce level of engagement in reactive stances with the government and media, (b) collaborate with external groups, (c) increase collaboration, (d) challenge the lack of importance of the professional focus in union structures, (e) consider a professional focus for teachers’ unions without one, and (f) collaborate more with other teachers’ unions and universities in professionally focused networking.

Overall, Naylor (1997) did not suggest abandoning the industrial models of teacher unionism, but suggested a strengthening of the professional and social justice focuses. Unions needed to select their issues, set their own agendas, and make challenges in different ways. They needed to reconsider what is claimed to be the professional nature and role of a teachers’ union.

The relationships between administrators and teachers' union leaders are complex. Research in the United States specifically through TURN highlighted alternatives to the adversarial approach. Collaboration between parties was encouraged for the benefit of students. According to Litzcke (2001), Canada may not be ready to accept the TURN philosophy.

Summary

In section 2, the literature review focused on specific themes related to the purpose of this study, which was to determine if a relationship existed between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable). Themes discussed were morale, principal role, teacher role, teacher/administrator relations, and labor/management relations.

Morale focused on various variables from the perspective of the individual. Recognition and appreciation, along with years of experience, might impact an individual's morale. The role of principal in Ontario was seen as complex. Leadership styles could enhance the role of principal. School culture and school climate were seen as impacting on principals as leaders or managers. The role of teacher was also seen as complex, as teachers needed to abide by policies of their board as well as direction from ETFO. Teachers were regarded as professionals, employees, and individuals involved in collective actions. The relationship between administrators and teachers' unions depends on collaboration, trust, and a positive learning community. The theoretical frameworks of

Argyris and Schön's (1974) double-loop theory and Senge's (2006) systems thinking was supportive in understanding the perceptions of any perceived interference of the union on administrators' and teachers' roles as the study progresses. The relationships between administrators and teachers' unions was also seen as complex. Research in the United States specifically through TURN highlighted alternatives to the adversarial approach. Collaboration between parties was encouraged for the benefit of students. However, according to Litzcke (2001), Canada might not be ready to accept the TURN philosophy.

Even though the literature review focused on relationships between administrators, teachers, management, and labor unions, there still remains a gap in the literature in response to the purpose of this study. Both American and Canadian sources were researched, yet the researcher found no specific literature that deals directly with perceived effects of teachers' union actions on administrators' and teachers' roles and administrators' and teachers' morale.

Sections 1 and 2 introduced the purpose, background, and literature review to identify the need for the study to determine if there was a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable). Section 3 will discuss the methodology to be used.

SECTION 3:

METHODOLOGY

The purpose of this survey study was to determine if there was a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable). This section describes the methods used in the study, including: (a) research design and approach, (b) setting and sample, (c) description of the treatment, (d) instrumentation and materials, (e) data analysis, and (f) summary of methodology.

Research Design and Approach

Various methodologies are implemented in research, each serving a different purpose and providing a different outcome. Researchers need to understand what information they wish to obtain prior to the collection of data. Babbie (1990) indicated that research methods include analysis of existing data, case study, controlled experiment, and participant observation.

Qualitative research provides information in the form of documentation of real events, records of what people say, observation of behaviors, or study of written documents (Neuman, 2000). On the other hand, quantitative researchers communicate meaning and interpret information by means of numerical analysis. This is accomplished by statistical methods that help to generalize findings. Quantitative researchers take an objective stance regarding participants and their settings, and use sample research to apply their findings to a larger population.

Postpositive knowledge claims furnish the theoretical perspective and rationale for implementing a quantitative inferential paradigm. Postpositivism challenges traditional notions of truth, including doubt about knowledge arising from studying human behavior and interactions, and it reflects a philosophy wherein causes determine outcomes (Phillips & Burbules, as cited in Creswell, 2003). In this methodology, the researcher collects data and makes revisions as necessary in order to prove a null hypothesis. If she rejects the null hypothesis, then she accepts the alternative hypothesis.

Questionnaires are a quantitative method of obtaining information from participants. Information gathered through this method would be difficult to gather through observation (Thyer, 2001). Information can be obtained by interviews, whether in person (within a group setting or individually), over the telephone, or self-administered. Surveys gather data on attitudes, knowledge, beliefs, and values.

The researcher selected quantitative inquiry for this study as it provided a numeric description of some portion of the population, sampled through the data collection method of asking people questions. This was the best choice of design for the following reasons:

1. Questionnaires are preferred for a quantitative study of organizational outcomes because they are unbiased (Wysong, 2000).
2. Questionnaires allow for generalization of findings to a larger population than the one from which the sample was drawn (Hartford, 2000).

3. Questionnaires are able to identify attributes of a larger population from a smaller group of individuals (Fowler, 2001).
4. Questionnaires provide numeric data that allow for correlation of two databases.
5. Questionnaires provide a rapid turnover in completion so that the researcher is able to gather the data in a timely manner.

Scientific research attempts to be logical (Babbie, 1990). As such, it attempts to guide the understanding of human behavior by seeking a general understanding.

This research was an examination of perceptions about whether there was a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable) This information comprised attitudes, beliefs, and values—all characteristics that could not be obtained by observation. The questionnaire was a logical choice to learn how administrators and teachers perceived their relationship, as well as perceptions about whether there was a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable).

Setting and Sample

Population

Population comprises all the elements about which the researcher wishes to make inferences (Cooper & Schindler, 1998). The population for this study implied all the administrators and teachers throughout Canada.

Target Population

Target population refers to the members of the Canadian Education Association—both administrators and teachers—who participated in this study as well as members of the Ontario Principals' Council. The target population has characteristics of interest to the researcher and the study in that administrators and teachers will participate in the study.

Sample

Samples are selected from the population to reflect the characteristics of the target population they represent. For this research, convenience sampling was chosen as the appropriate sampling method for the researcher; it may not reflect the entire target population. The researcher was not able to conduct a random sample that would have ensured that each respondent had an equal chance of being included in the sample.

Purposive sampling might have been another choice as a sampling method. According to Neuman (2000), purposive sampling uses judgment in selecting cases with a specific purpose in mind. Zikmund (2000) concurred that “the researcher [should select] a sample to serve a specific purpose, even if this makes a sample less than fully

representative” (p. 351). There was no assurance that other organizations would allow the researcher access to administrators and teachers.

Sampling Procedure

Sampling is a process that utilizes a portion of the whole population to make conclusions regarding the whole population. A sample is a portion of a population. The purpose of sampling is to enable the researcher to estimate some unknown characteristics of the population. Through sampling, the researcher is able to gather information quickly, cut costs, and reduce the labor needed to conduct research (Zikmund, 2003).

For this research, initial contact was made with representatives of the Canadian Education Association as well as the Ontario Principals’ Council. The Canadian Education Association was chosen because it represented both administrators and teachers. The Ontario Principals’ Council was chosen because they were representative of administrators. Each organization was asked to acknowledge willingness to participate in the study via a written document (Appendixes A, B, C, and D). The sampling frame was the members of the Canadian Education Association as well as members of Ontario Principals’ Council. The sample consisted of those teachers and administrators who chose to participate from both associations.

Sample Size Justification

The power calculations were performed using PASS (statistical software). Hypothesis 1 was tested using a two-sample t test. The dependent variable (MOR) has a theoretical range of possible values of 1–4. Assuming a normal distribution, 99.7% of the

data lie within ± 3 standard deviations of the mean. Therefore, the standard deviation might be estimated by the range divided by 6. Thus, an estimate of the standard deviation is $4/6 = 0.67$. According to Cohen (1988), small, medium, and large effect sizes for a two-sample t test are $d = 0.2$, $d = 0.5$, and $d = 0.8$, respectively. A sample size of 100 (50 teachers and 50 administrators) would achieve 80% power to detect an effect size of 0.57 (a medium effect size) with estimated group standard deviations of 0.67 and 0.67 and with a significance level (alpha) of 0.05 using a two-sided two-sample t test. For example, if the population average MOR score for teachers was 3.00 and the population average MOR score for administrators was 2.62, this would correspond to an effect size of 0.57. This study would have an 80% chance of detecting this difference at the 0.05 level of significance.

Hypothesis 2 was tested using Pearson's correlation coefficient. According to Cohen (1988), small, medium, and large effect sizes for hypothesis tests about the Pearson correlation coefficient (r) are $r = 0.1$, $r = 0.3$, and $r = 0.5$, respectively. A sample size of 100 produces 80% power to detect an effect size of 0.28, which is a medium effect size. For example, an effect size of 0.28 corresponds to a comparison of the null hypothesis that $r = 0.0$ versus the alternative hypothesis that $|r| > 0.28$. If the true population correlation between MOR and LE was 0.28 or greater, this study would have an 80% chance of detecting this correlation (i.e., achieving statistical significance) at the 0.05 level of statistical significance.

Hypothesis 3 was tested using multiple linear regression analysis. Power analysis for multiple linear regression is based on the amount of change in *R*-squared attributed to the variable of interest. According to Cohen (1988), small, medium, and large effect sizes for hypothesis tests about *R*-squared are $R\text{-squared} = 0.0196$, $R\text{-squared} = 0.13$, and $R\text{-squared} = 0.26$, respectively. A sample size of 100 achieves 80% power to detect an *R*-squared of 0.067 (which is a medium effect size) attributed to 1 independent variable (ROLE), after controlling for 2 covariates (LE) using an *F*-test with a significance level (alpha) of 0.05. Thus, a sample size of 100 is justifiable for detecting medium effect sizes for Hypotheses 1–3.

Description of the Treatment

The treatment consisted of two questionnaires administered online to the sample group of administrators and teachers.

Each participant received an electronic implied informed consent form (Appendix E) as part of the introduction to the survey on Survey Monkey. Participants were assured that their names would remain confidential and their surveys were anonymous.

The study formally began after IRB approval, dated July 21, 2008. At that time the Canadian Education Association invited both administrators and teachers to participate in the study by means of their online newsletter. At the same time, the Ontario Principals' Council invited administrators to participate in the study by means of their online newsletter. The researcher followed the process of entering the questionnaires online, completing the treatment, and submitting responses. By August 11, 2008, the

online survey was closed and data were downloaded from the server and imported into the SPSS software for data analysis. The data analysis procedures are discussed in the following section.

Statistical Measures

Independent Variables

Independent variables are the variables which are controlled by the researcher. They usually consist of the two (or more) treatment conditions to which the participants are exposed.

Role (ROLE). This was measured on a categorical scale. The study participant's academic role was recorded as either teacher or administrator.

Perceived union impact (PUI). This score was measured on a continuous scale with a range of 1–4. The score was computed as the average of Questions 1–20 on the Learning Environment (LE) questionnaire. The researcher chose to label the questionnaire “Learning Environment” in order to keep the questionnaire more neutral, as labeling the questionnaire “Perceived Union Impact” might evoke biased responses to it.

Union impact refers to any condition which exists as a result of the teachers' union actions that might adversely impact the learning environment. Lower scores indicated an academic staff member who perceived less union impact while higher scores indicated an academic staff member who perceived more union impact.

Dependent Variable

The dependent variable is the one that is observed for changes in order to assess the effect of the treatment.

Morale (MOR). This score was measured on a continuous scale with a range of 1–4. The score was computed as the average of Questions 1–61 on the Teacher/Administrator Morale questionnaire. Questions 1, 4, 5, 7, 9, 13, 18, 22, 23, 25, 30, 32, 40, 44, 52, and 54 will be reverse-scored prior to calculation of the morale score. Lower scores indicated an academic staff member with low morale while higher scores indicated an academic staff member with high morale.

Instrumentation and Materials

A popular instrument to measure factors that affect teacher morale is the Purdue Teacher Opinionnaire, which Houchard (2005) implemented in her study. Houchard (p. 49) described the Purdue Teacher Opinionnaire instrument (from which the teacher/administrator morale instrument is adapted) as one that is designed to help break down teacher morale into 10 specific dimensions for more meaningful discoveries and is designed to estimate individual, school, and system-wide morale. The instrument is composed of 100 questions that can be divided up into 10 different dimensions. The dimensions of teacher morale included teacher rapport with principal, satisfaction with teaching, rapport among teachers, teacher salary, teacher load, curriculum issues, teacher status, community support of education, school facilities and services, and community

pressures. Information from Purdue University relayed that permission was no longer needed to use the PTO because the copyright protection had expired (Appendix F).

One of the questionnaire instruments used in this study was an adaptation of the Purdue Teacher Opinionnaire, entitled Teacher/Administrator Morale Questionnaire (Appendix G). This modified instrument was designed to provide the participant with the opportunity to express opinions about the work and various school problems in the participant's particular school situation. It was based on a Likert scale with the following criteria: *disagree*, *probably disagree*, *probably agree*, and *agree*.

One other survey instrument was administered, entitled Learning Environment Questionnaire (Appendix H). This instrument was adapted, from practices in the Elementary Teachers Federation of Ontario handbook (2007). The handbook is for members of ETFO in one district of Ontario. It is meant to address frequently asked questions by its members. Senior superintendents vetted the handbook as a quick reference for teachers. Teachers are encouraged to consult the Collective Agreement and Board Policies/Procedures for further details. In the Learning Environment Questionnaire, participants commented about the impact of certain expectations on the learning environment for educators (e.g., annual learning plans, arrival/departure times, and field trips). The instrument implemented a Likert scale based on the following criteria: *very negative*, *negative*, *positive*, and *very positive*.

Questions posed in both instruments are presented in Table 1.

Table 1

Teacher/Administrator Morale Questionnaire and Learning Environment Questionnaire

Hypothesis	Related questions
<p>Hypothesis 1: The average morale score (MOR) is the same for public school teachers and administrators (ROLE).</p>	<p>Is there a difference in the level of morale between public school teachers and administrators? Teacher/Administrator Morale Questionnaire, Questions 1–61</p>
<p>Hypothesis 2: There is no correlation between the morale score (MOR) and the learning environment score (LE).</p>	<p>What is the relationship between the level of morale and the level of perceived union interference (learning environment) among public school teachers and administrators? Teacher/Administrator Morale Questionnaire, Questions 1–61 and Learning Environment Questionnaire, Questions 1–20</p>
<p>Hypothesis 3: When controlling for the learning environment (LE), there is no difference in the level of morale (MOR) between public school teachers and administrators (ROLE).</p>	<p>When controlling for the level of perceived union interference (learning environment), is there a difference in the level of morale between public school teachers and administrators? Teacher/Administrator Morale Questionnaire, Questions 1–61 and Learning Environment Questionnaire, Questions 1–20</p>

Validity

Validity is the strength or accuracy of conclusions or inferences and assists in approximating the truth or falsity of a given inference, according to Cook and Campbell (1979, as cited in Trochim, 2006). There are four types of validity common to social research: (a) conclusion validity, (b) internal validity, (c) construct validity, and (d) external validity. Face validity demonstrates construct validity; it shows if there is a relationship between how the researcher operationalized concepts in the study and the actual causal relationship. “Face validity refers to the subjective agreement among professionals that a scale logically appears to reflect accurately what it purports to measure” (Zikmund, 2003, p. 302).

To establish the validity of the learning environment and morale scale scores, a panel of three to five experts in the field of education was consulted. In order to ensure validity, readability, clarity, and ease of administration, the panel was asked to review the learning environment and morale questionnaires for face validity, that is, to establish whether or not the learning environment and morale scale scores are valid for measuring what they were intended to measure. The panel scrutinized the questionnaires for both content and format. The panel suggested revisions, additions, or deletions to items on the survey. All such changes were documented and reported.

The Purdue Teacher Opinionnaire (1970) is a revision of the Purdue Teacher Morale Inventory (1961). According to Rosner (cited in Gore, 1983, p. 35), the PTO “appears to be a carefully constructed research instrument” in that it gives an estimate of

the individual teacher, school, or system-wide morale. The ten subscores, or factors, provide an insight into teacher reaction to components of teacher morale. Blackburn & Wilkes (1997) indicated that the PTO validity was established using peer judgment. In her dissertation, Gore (1983) reported that the *Manual for the Purdue Teacher Opinionnaire* stated that there is “no relevant criterion on which to judge the validity of an instrument of this nature, except, to some extent, the performance of teachers” (pp. 36–37).

As for the validity of the Learning Environment instrument, the researcher received feedback from the panel of three to five experts with regard to face validity. The overall comments from the panel were that some of the statements appeared “overly negative” and the panel suggested that the researcher reverse some of the statements so that they became more positive statements. Otherwise, validity was established by the feedback from the experts, and the researcher altered some of the questions to promote a positive sense.

One expert suggested that the Likert scale reflect consistency similar to the teacher/administrator instrument by modifying the choices to *very negative, somewhat negative, somewhat positive, very positive*. The researcher decided to leave the qualifiers as such, as she felt it would not impact heavily on the study. One of the experts needed clarification in Question 7 regarding the concept of mentoring and to whom. The researcher rephrased the question in a positive manner, by implementing the word *encouraging*. One of the experts regarded Question 9 as somewhat of a “motherhood

statement” and suggested “allowing teachers to resolve disputes among themselves informally without a formal mechanism.” The researcher decided to change the statement but take out “without a formal mechanism” in order to create a positive comment. Question 18 appeared to be unclear to one of the members who did not understand the concept of “efficient procedures.” The researcher changed the sentence to reflect the role of the administrator as one of curriculum leader with regard to timetabling. Therefore, the experts reviewed the Learning Environment Questionnaire for content and format. The researcher made revisions based on the feedback from the panel of experts. These changes have been documented and reported in the validity of the learning environment instrument.

Reliability

According to Trochim (2006), reliability is the repeatability of a measurement—the degree to which an instrument measures the same way each time it is used under the same conditions with the same subjects. “Reliability applies to a measure when similar results are obtained over time and across situation. Broadly defined, reliability is the degree to which measures are free from error and therefore yield consistent results” (Zikmund, 2003, p. 300). There are two methods to establish reliability: (a) test/retest and (b) internal consistency. Internal consistency involves one administration of an instrument that estimates reliability by grouping questions in a questionnaire that measures the same concept:

The test-retest method of determining reliability involves administering the same scale or measure to the same respondents on two separate times to test for

stability. If the measure is stable over time, the test, administered under the same conditions each time, should obtain similar results. (Zikmund, p. 300).

A pilot study of 15 teachers and administrators was conducted to measure the internal consistency reliability of the learning environment and morale scale scores.

According to Houchard's dissertation (2005, p. 41), Bentley and Rempel (1968) reported that the Purdue Teacher Opinionnaire's test-retest correlation for the total score was .87, with the correlations for the 10 subscales ranging from .62 to .88. However, 9 of the 10 subscales had test-retest correlations greater than .75 with the weakest correlation of .62 for the Community Pressure subscale. According to the Cronbach's alpha reliability coefficients, the closer the coefficient was to 1.0, the higher the reliability. In order to determine reliability for the Purdue Teacher Opinionnaire, Table 3 shows the Cronbach's alpha reliability coefficients for the Purdue Teacher Opinionnaire. The closer the coefficient is to 1.0, the higher the reliability.

According to Blackbourn and Wilkes (1987), the PTO indicated an internal consistency reliability coefficient of .96. Furthermore, Gore (1983) reported in her dissertation that Coughlan and Froemel (as cited in Gore, p. 36) found the PTO to be in the "acceptable range of reliability." Reliability in Gore's study of 3,000 teachers provided data for test-retest reliability estimates. "Reliability of the total score was .87. Scores on individual factors ranged in reliability from .62 (community pressures) to .88 (teacher rapport with principal). Approximately .80 was the median reliability coefficient for the ten factor scores" (Gore, p. 36).

Each of the 15 study participants completed the learning environment questionnaire and the teacher/administrator morale questionnaire. Cronbach's alpha was used to measure the internal consistency reliability of the morale (MOR) and learning environment (LE) scale scores. If Cronbach's alpha was greater than 0.7 for both scale scores, then the learning environment and morale questionnaires would be considered reliable. Otherwise, an item analysis would be conducted in an attempt to maximize the internal consistency reliability of the scale scores.

The study data as well as the pilot study data will need to be kept for a reasonable period of time, approximately 5 to 10 years (Sieber, as cited in Creswell, 2003). Investigators should then discard data. A proposal might be made regarding ownership of the data. Berg (2001, as cited in Creswell, 2003) recommended the use of an agreement to designate ownership of research data.

Data Collection and Analysis

Data Collection Procedure

Upon approval from Walden University's Institutional Review Board (IRB), the researcher invited volunteers to participate in an anonymous survey on the Survey Monkey Web site at www.surveymonkey.com. The invitations were issued to administrators and teachers through the Canadian Education Association's newsletter and through the Ontario Principals' Council's newsletter (see Appendixes B and C). On the Survey Monkey site, the first page participants saw was the implied informed consent form (Appendix E). At the bottom of the letter was a button to click, with a statement that

read, “By clicking the button below, you are providing consent to participate in the study.” Clicking the button directed the study participant to the survey. When at least 50 teachers and 50 administrators completed the survey, the survey was closed. If fewer than 50 administrators or 50 teachers completed the survey, then a second sample would have been selected, possibly from another association, and invited to participate in the study. This procedure was to continue until at least 50 teachers and 50 administrators had completed the survey.

Data Analysis

The research question for Null Hypothesis 1 asked: Is there a difference in the level of morale between public school teachers and administrators? Therefore Null Hypothesis 1 stated “ H_0 : The average morale score (MOR) is the same for public school teachers and administrators (ROLE).”

The research question for Null Hypothesis 2 asked: What is the relationship between the level of morale and the level of perceived union interference (learning environment) among public school teachers and administrators? Therefore, Null Hypothesis 2 stated “ H_0 : There is no correlation between the morale score (MOR) and the learning environment score (LE).”

The research question for Null Hypothesis 3 asked: When controlling for the level of perceived union interference, is there a difference in the level of morale between public school teachers and administrators? Therefore, Null Hypothesis 3 stated “ H_0 :

When controlling for the learning environment (LE), there is no difference in the level of morale (MOR) between public school teachers and administrators (ROLE).”

The questionnaire data from the Teacher/Administrator Morale Questionnaire were analyzed using a two-sample *t* test and an error bar chart which showed the average (and 95% confidence interval for the average) morale score, separately for administrators and teachers. The independent variable for this questionnaire was the role of either administrator or teacher. The dependent variable was morale. There were 61 questions associated with this questionnaire.

The questionnaire data from the Learning Environment Questionnaire were analyzed using Pearson’s correlation and a scatter plot which depicted the relationship between the morale score (dependent variable) and the learning environment score (independent variable). There were 20 questions associated with this questionnaire. Multiple linear regression analysis was implemented to build a model with two independent variables—learning environment and role—wherein the researcher controlled for the learning environment score.

The descriptive data statements were analyzed for means and frequencies. The means were reported for each variable. All statistical analyses were performed using SPSS for Windows (SPSS 16.0). All of the analyses were two-sided, with a 5% alpha level. Cronbach’s alpha was used to measure the internal consistency reliability of the morale (MOR) and learning environment (LE) scale scores.

Considerations for Participants

Measures were taken to protect participants' rights. In general, investigators file research proposals containing the procedures and information about the participants with the IRB committee. For this study, the IRB reviewed research plans and assessed the potential for risk of physical, psychological, economic, or legal harm (Sieber, as cited in Creswell, 2003) to participants in the study. The researcher considered special needs of vulnerable populations, such as victims, persons with neurological impairments, and other individuals with disabilities.

The researcher also developed an electronic implied informed consent form, which contained a statement indicating that completion and submission of the survey represented the participant's consent to serve as a subject in this research. At the bottom of the letter was a button and a statement that read: "By clicking the button below, you are providing consent to participate in the study." Elements of the consent form included:

1. The right to participate voluntarily and the right to withdraw at any time, so that the individual would not be forced into participation.
2. The purpose of the study, so that individuals would understand the nature of the research and its impact on them.
3. The procedures of the study, so that individuals could reasonably expect what to anticipate.
4. The right to ask questions, obtain a copy of the results, and have their privacy respected.

5. The benefits of the study. (Creswell, 2003)

Summary of Methodology

This section examined the methods to be used in this study. It included a description of the study, research design and approach, setting and sample, description of the treatment, instrumentation and materials, and data analysis. This quantitative study was designed to investigate the relationships between perceived effects of teachers' union actions on administrators' and teachers' roles and administrators' and teachers' morale.

The target population for this study was administrators and teachers from the Canadian Education Association and administrators from the Ontario Principals' Council. The sampling frame consisted of members of the Canadian Education Association; the sample consisted of those teachers and administrators and voluntary members from the Ontario Principals' Council who chose to participate. Each individual in the population voluntarily chose to participate in the study.

Each participant received an electronic implied informed consent form (Appendix E) as part of the introduction to the survey on Survey Monkey. Participants were assured that their names would remain confidential and their surveys would be anonymous.

SECTION 4:

PRESENTATION AND ANALYSIS OF DATA

Introduction

The purpose of this quantitative study was to determine if there was a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable). As teachers belong to a union, their actions as union members may impact on the roles of both administrators and teachers in the working environment. Administrators and teachers work in an organization where learning to work effectively together is critical. The theoretical frameworks of Argyris (1999), Schön (1987), and Senge (2006) provided the foundation to explore the relationship between perceptions of union actions and morale.

Research Tools

Two questionnaire instruments were used in this study. The perceived effects of teachers' union actions on roles of administrators and teachers were measured by the Learning Environment Questionnaire, a researcher-developed instrument, adapted from practices in the Elementary Teachers Federation of Ontario's (2007) handbook (see Appendix H). In this questionnaire, participants commented about the impact of certain functions of the role on the learning environment for educators—for example creating annual learning plans, setting arrival/departure times, and taking students on field trips. The instrument implemented a Likert scale based on the following criteria: *very negative*, *negative*, *positive*, and *very positive*.

The second survey instrument, the Teacher/Administrator Morale Questionnaire, was an adaptation of the Purdue Teacher Opinionnaire (see Appendix G). This modified instrument provided participants with the opportunity to express opinions about their work and various school problems in their particular school situation. It was based on a Likert scale with the following criteria: *disagree*, *probably disagree*, *probably agree*, and *agree*.

The target population for this study comprised administrators and teachers from the Canadian Education Association (CEA) and administrators from the Ontario Principals' Council. The sampling frame consisted of members of the CEA; the sample comprised those teachers and administrators who chose to participate as well as voluntary members from the Ontario Principals' Council. The survey was conducted online using Survey Monkey software. Each participant received an electronic implied informed consent form (Appendix E) as part of the online introduction to the survey. Participants were assured that their names would remain confidential and their surveys would be anonymous.

Seventy-one administrators and 64 teachers responded to the survey. The return rate of those who completed the survey was 63 administrators (53%) and 57 teachers (47%). The power analysis conducted during the methodological considerations phase of this study showed that the sample size of 100 was justifiable for detecting medium-effect sizes. Thus, the final sample size was more than adequate for this study. The information related to each questionnaire will be presented in conjunction with the relevant hypothesis.

Hypothesis Analysis

Overview of Results

Hypothesis 1 was that the average morale score would be the same for public school teachers and administrators. The results indicated that there was no statistically significant difference in the average morale score between the two groups. Therefore, the null hypothesis was not rejected.

Hypothesis 2 was that there was no correlation between the morale score and the learning environment score. The correlation between the morale and learning environment scores was not statistically significant. Therefore, the null hypothesis was not rejected.

Hypothesis 3 was that, when controlling for the learning environment score, there would be no difference in the level of morale between public school teachers and administrators. When the learning environment score was controlled, there was a statistically significant difference in the mean morale score between teachers and administrators. Therefore the null hypothesis was rejected.

The questionnaire data were analyzed using several techniques. All statistical analyses were performed using SPSS for Windows (SPSS 16.0). All of the analyses were two-sided, with a 5% alpha level. Tables 2 and 3 show that Cronbach's alpha was used to measure the internal consistency reliability of the morale (MOR) and learning environment (LE) scale scores; these were 0.94 for the morale and 0.81 for the learning environment.

Table 2

Cronbach's Alpha Learning Environment Score

Cronbach's alpha	No. of items
.810	20
.941	61

Table 3

Cronbach's Alpha Morale Score

Cronbach's alpha	No. of items
.941	61

Since the morale score was the average of Questions 1–61, the negatively worded statements were reversed before computing the morale score, as some of the questions were negatively worded (such as Question 1), so that a response of “agree” would indicate a negative impact on morale, and other questions were positively worded (such as Question 2) so that a response of “agree” would indicate a positive impact on morale. By reverse score, 4 was converted to 1, 3 to 2, 2 to 3, and 1 to 4. Therefore, larger numbered responses always indicated a positive impact on morale. The negatively worded statements that were reversed scored were: 1, 4, 5, 7, 9, 13, 18, 22, 23, 25, 30, 32, 40, 44, 52, and 54.

Table 4 shows the mean learning environment score was 2.63, with a standard deviation of 0.37. The distance from the upper real limit of the highest score to the lower real limit of the lowest score was 3.55 to 1.30. In other words, the maximum score that

participants achieved was 3.55 and the lowest score that participants achieved was 1.30. However, the minimum score possible was 1.0 and the maximum score possible was 4.0. Thus, the mid-range of the possible scores is 2.5, which could be considered as “neither good nor bad” or relatively neutral, with respect to the learning environment. A high learning environment score indicated a negative learning environment. Thus, on average, considering both teachers and principals combined, the study participants felt the learning environment was leaning toward poor since the average score was greater than 2.50.

Table 4 also shows the mean morale score was 2.95, with a standard deviation of 0.41. The distance from the upper real limit of the highest score to the lower real limit of the lowest score was 3.97 to 1.75. In other words, the maximum score that participants achieved was 3.97 and the lowest score that participants achieved was 1.75. However, the minimum score possible was 1.0 and the maximum score possible was 4.0. Thus, the mid-range of the possible scores was 2.5, which could be considered as “neither good nor bad” with respect to morale. A high morale score indicated that participants perceived that there was good morale in the building. Therefore, on average, the study participants scored above the mid-range score, indicating they were leaning toward high morale.

Table 4

Descriptive Statistics for Learning Environment and Morale Scores for Entire Sample

	No.		Mean	Std. deviation	Minimum	Maximum
	Valid	Missing				
Learning environment score	120	0	2.6287	.37	1.30	3.55
Morale score	120	0	2.9534	.41	1.75	3.97

Figure 1 is a histogram displaying the distribution of learning environment scores. From this histogram, it was evident that approximately 75% of the respondents from the group of administrators and teachers scored above the mean or average of 2.63. The distance from the upper real limit of the highest score to the lower real limit of the lowest score for the learning environment was 3.55 to 1.30. That means that the highest score for learning environment was 3.55 and the lowest score for learning environment was 1.30. The histogram made no distinction between administrators and teachers.

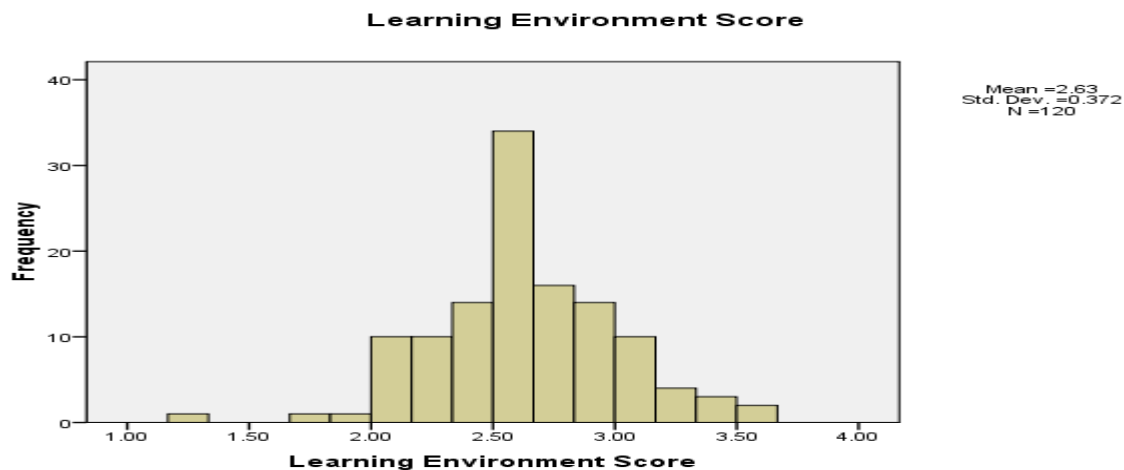


Figure 1. Learning environment score, indicating approximately 75% of respondents from the group of public school administrators and teachers scored above the mean of 2.63 with no distinction between administrators and teachers.

Figure 2 is a histogram displaying the distribution of morale scores. The mean or average morale score was 2.95 with a standard deviation of 0.41, and the distance from the upper real limit of the highest score to the lower real limit of the lowest score was 3.97 to 1.75. That means that the highest score for morale was 3.97 and the lowest score for morale was 1.75. According to the histogram, there were fewer participants who scored below the mean of 2.95, which indicated that the participants perceived that the morale of their buildings was scored in the average range. A low score would indicate lower morale and a higher score would indicate higher morale.

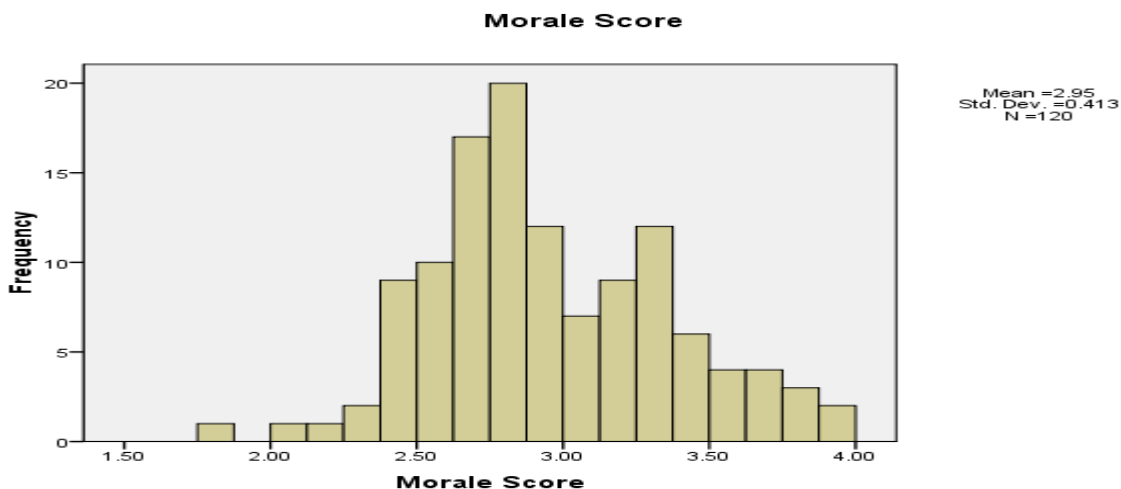


Figure 2. Morale score, indicating that fewer participants scored below the mean of 2.95, which indicated that the participants perceived that the morale of their buildings was scored in the average range.

Results of Data Analysis of Hypothesis 1

It was hypothesized that the average morale score would be the same for teachers and administrators. In order to test Hypothesis 1, an error bar chart (a natural choice when comparing two means) and a two-sample *t* test were implemented. Figure 3 is an error bar chart, indicating a 95% confidence interval (which indicates how confident the true population mean is compared to the sample mean).

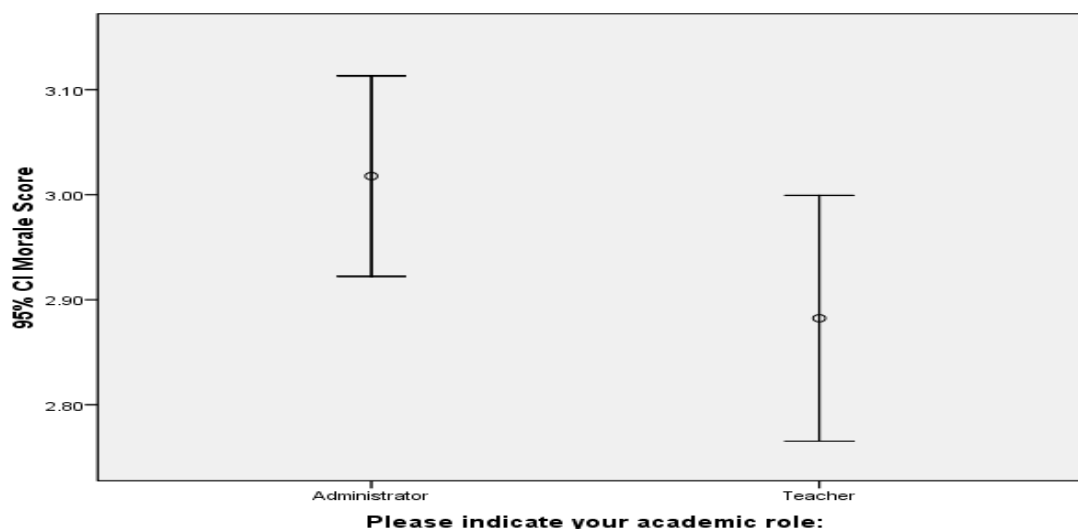


Figure 3. Academic role, indicating a 95% confidence level where the mean morale score for public school administrators and teachers were shown individually. The graph indicates that the teachers' group had a lesser mean than the administrator's group.

The error bar chart shows the mean morale score for administrators and teachers individually. If the p -value from the t test was less than .05, then the null hypothesis would be rejected. At first glance, the graph indicated that the teachers' group had a lesser mean than the administrators' group.

However, tables 5 and 6 show no statistically significant difference in the average morale score between the two groups. Table 5 identifies the number of participating administrators as 63 and the number of participating teachers as 57. The average or mean score for the administrators was 3.02 with a standard deviation of 0.38. In comparison, the average or mean score for the teachers were 2.88 with a standard deviation of 0.44. The results of the t test for equality of means (in other words, the null hypothesis) indicated the morale score in which, according to the formula, the degrees of freedom were equivalent to $df = 118$, using a 2-tail t test. The final result for the t test was $t(118) =$

1.81 with a p -value of 0.073. If the p -value was less than .05, the null hypothesis would be rejected. Therefore, the null hypothesis was not rejected and it was concluded that there was no difference in the average morale score between teachers and administrators.

Table 5

Group Statistics for Morale Score of Administrators and Teachers

	Academic role	No.	Mean	Std. deviation	Std. error mean
Morale score	Administrator	63	3.0177	.37884	.04773
	Teacher	57	2.8824	.44101	.05841

Table 6

Independent Samples Test for Morale Score

<i>t</i> test for equality of means			
	<i>t</i>	<i>df</i>	Sig. (2-tailed)
Morale score	1.808	18	.073

Results of Data Analysis for Hypothesis 2

It was hypothesized that there was no correlation between the morale score and the learning environment score. In order to test Hypothesis 2, the Pearson's correlation test was implemented. This test measures the direction and degree of linear (straight-line) relationship between two variables (in this case, the learning environment score and the morale score) as depicted by a scatter plot. Figure 4 is a scatter plot which graphically displays the relationship between the morale score and the learning environment score.

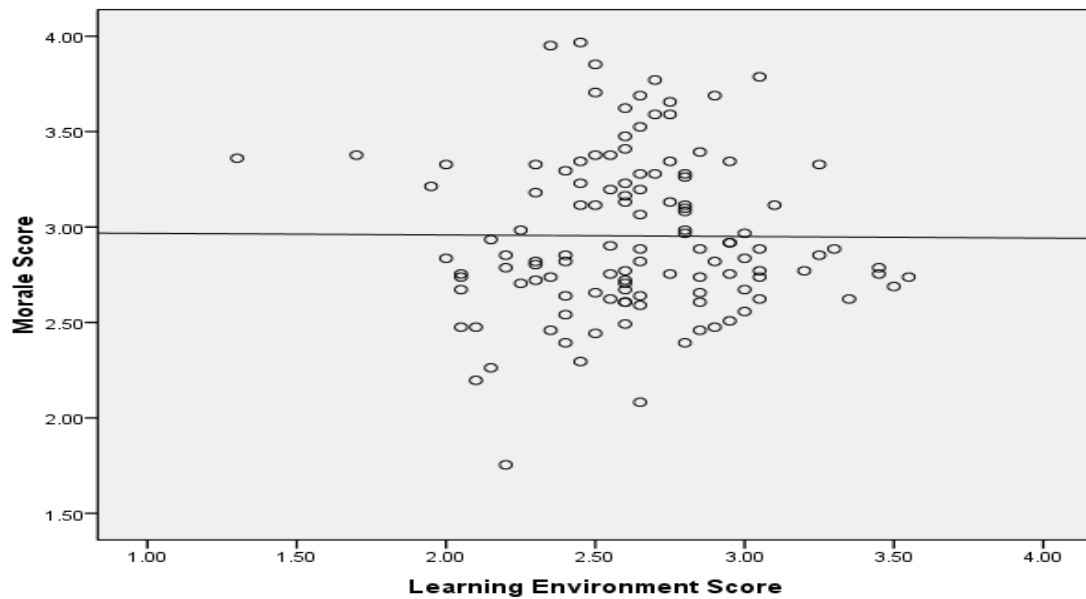


Figure 4. Learning environment score is depicted as a scatter plot which displays the relationship between the morale score and the learning environment score. The scatter plot indicates a nonsignificant trend line.

The strength and direction of a linear relationship can be represented graphically by means of a trend line. The scatter plot does not indicate a trend line which might indicate a sloping in an upward or downward direction. Data are distributed throughout the scatter plot and there is one horizontal line.

Table 7 shows that, according to the Pearson's correlation test, the correlation between the morale and learning environment scores was not statistically significant; the correlation was -0.007 with a p -value of 0.94 .

Table 7

Correlations Between Morale and Learning Environment Scores

		Learning environment score
Morale score	Pearson correlation	-.007
	Sig. (2-tailed)	.935
	No.	120

Thus, the null hypothesis was not rejected since the p -value was not less than .05. It was concluded that there was no correlation between the morale score and the learning environment score.

Results of Data Analysis for Hypothesis 3

It was hypothesized that, when controlling for the learning environment score, there would be no difference in the level of morale between teachers and administrators. In order to test Hypothesis 3, a multiple linear regression analysis was implemented. Table 8 shows that when the learning environment score was controlled, there was a statistically significant difference in the mean morale score between teachers and administrators wherein the p -value was 0.028. Consequently, the null hypothesis was rejected. When the learning environment score was controlled, on average, teachers had a lower morale score than administrators.

Table 8
Coefficients to Control for the Learning Environment Scores

Model		Unstandardized coefficients		Standardized coefficients		
		B	Std. error	Beta	<i>t</i>	Sig.
1	(Constant)	3.653	.405		9.014	.000
	Learning environment score	-.155	.120	-.139	-1.287	.201
	Academic role	-.198	.089	-.241	-2.222	.028

Note. The dependent variable is the morale score.

With the learning environment controlled, the mean morale score was expected to be 0.20 points lower for teachers as compared to administrators. This was determined by the mathematical equation of the line, which was $MOR = 3.65 - 0.16 * LE$ (learning environment score) $- 0.20 * ROLE$ (administrator = 1; teacher = 2). Table 9 shows that the adjusted *R*-square, which was a measure of effect size that determines what portion of the variability in the scores could be accounted for by the treatment effect, was only 0.024.

Table 9
Model Summary for Effect Size

Model	Adjusted <i>R</i> -square
1	.024

Note. The dependent variable is the morale score.

The effect size is a measurement of how different the two groups are and more specifically how different the means are between the two groups. The adjusted *R*-square demonstrates how useful the model of multiple linear regression analysis was for this study. The usual adjusted *R*-square varies from 0–1. The closer the score to 1, the better a predictor the model is. Thus, the score of 0.24 was closer to 0 than 1 and was therefore not considered a reliable predictor. Therefore, the combination of the learning environment and role scores accounted for only 2.4% of the total variance in morale scores. Hence, the multiple linear regression model is not regarded as a highly accurate model for prediction purposes.

Three Further In-Depth Analyses

After initial analyses, there appeared to be no conclusive difference in morale between teachers and administrators except for the rejection of Null Hypothesis 3, wherein the learning environment was controlled for. Additional information was needed, apart from the data analysis of the three hypotheses. It was recommended that more in-depth understanding of the relationships between morale, learning environment, and role be explored. Thus three further in-depth analyses were conducted.

In the first in-depth analysis, an error bar chart and a two-sample *t* test compared the mean learning environment score between teachers and administrators. In the second, scatter plots and Pearson's correlations compared the morale and learning environment scores separately for teachers and administrators. In the third, a multiple linear regression analysis tested for an interaction effect between the learning environment score and role.

First In-Depth Analysis

As reported, in Hypothesis 1 there was no statistically significant difference in morale between teachers and administrators without controlling for the learning environment score. However, in Hypothesis 3, when the learning environment score was controlled, the analysis indicated that there was a statistically significant difference in morale between teachers and administrators. Therefore, further in-depth analyses were needed in order to clarify the relationships between morale, learning environment, and role. The findings suggested investigations to establish how the learning environment score might be different for teachers and administrators, and a two-sample t test to compare the average learning environment score between teachers and administrators was conducted.

Figure 5 is an error bar chart that illustrates the mean learning environment score (and 95% confidence interval) separately for administrators and teachers. The chart demonstrates a higher average among administrators.

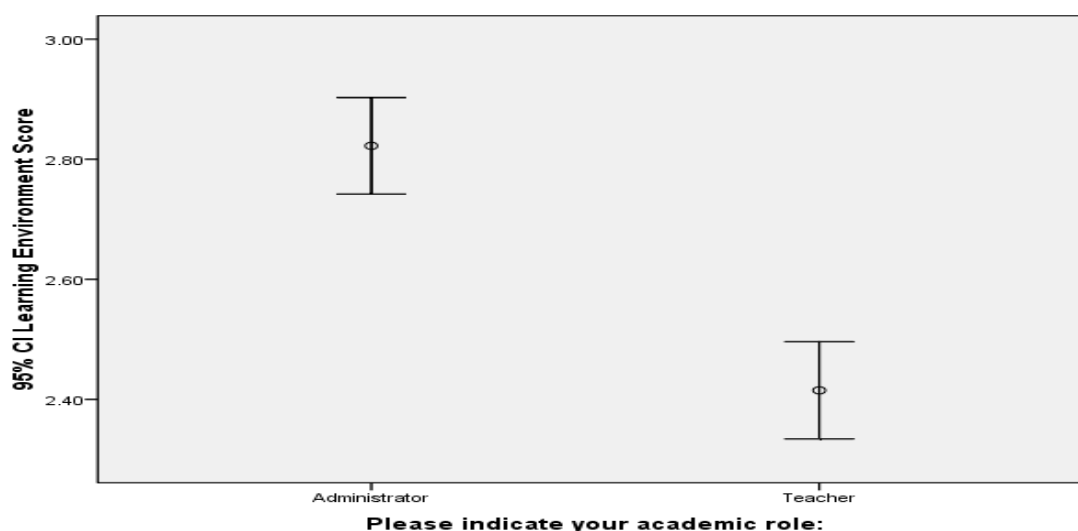


Figure 5. Academic role, an error bar chart illustrating the mean learning environment score separately for administrators and teachers. There is a higher average among administrators.

Tables 10 and 11 indicate a statistically significantly higher average learning environment score among administrators versus teachers. The t test for equality of means indicated $t(118) = 7.12$ with a p -value of less than 0.001.

Table 10

Group Statistics for Learning Environment Scores of Administrators and Teachers

	Academic role	No.	Mean	Std. deviation	Std. error mean
Learning environment score	Administrator	63	2.8222	.31925	.04022
	Teacher	57	2.4149	.30545	.04046

As the null hypothesis was rejected, the findings suggested that administrators have a statistically significantly larger average learning environment score than teachers.

Table 11

Independent Samples Test for Learning Environment Score

<i>t</i> test for equality of means			
	<i>t</i>	<i>df</i>	Sig. (2-tailed)
Learning environment score	7.124	118	.000

In the case of a two-sample *t* test, the effect size is a measure of how different the averages are between the two groups. According to Cohen (1988), small, medium, and large effect sizes for a two-sample *t* test are: $d = 0.2$, $d = 0.5$, and $d = 0.8$ respectively. A small effect size would indicate a difference that probably would not be discernible in practice. A large effect size, on the other hand, suggests the difference between the groups would likely be easily observable in practice.

Effect size for a *t* test is the difference between the means divided by the pooled standard deviation. The pooled standard deviation was 0.31. Thus, the effect size is $[2.82 - 2.41]/0.31 = 0.41/0.31 = 1.32$, which is a large effect size. Thus, it is very likely that those working in the field of education would notice a discernible difference in how teachers and administrators view the learning environment.

Second In-Depth Analysis

In the second in-depth analysis, scatter plots and Pearson's correlations compared the morale and learning environment scores separately for teachers and administrators. In light of the fact that administrators had a larger mean learning environment score than the teachers, and that this difference clarified the discrepancy in morale between administrators and teachers, the rationale to explain how the relationship between morale

and learning environment scores was different for administrators and teachers was explored.

Figure 6 is a scatter plot which illustrates the relationship between the morale score and the learning environment score for administrators only. The graph indicates a negative trend.

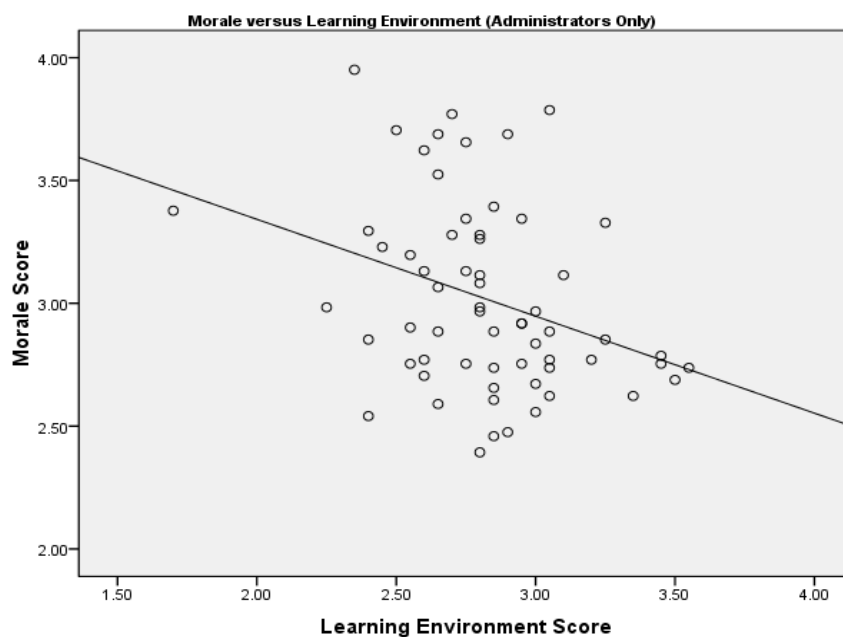


Figure 6. Scatter plot for administrators, indicating the relationship between the morale score and the learning environment score which presents a negative trend.

Figure 6 shows there was a statistically significant and moderately strong negative correlation between the morale and learning environment scores for administrators with a correlation of $r(63) = -0.33$ and a p -value of 0.008. The results indicated a tendency for administrators who view the learning environment factors as impacting negatively on the learning environment to have lower morale. Figure 7 does not illustrate any trend between the morale and learning environment scores for teachers.

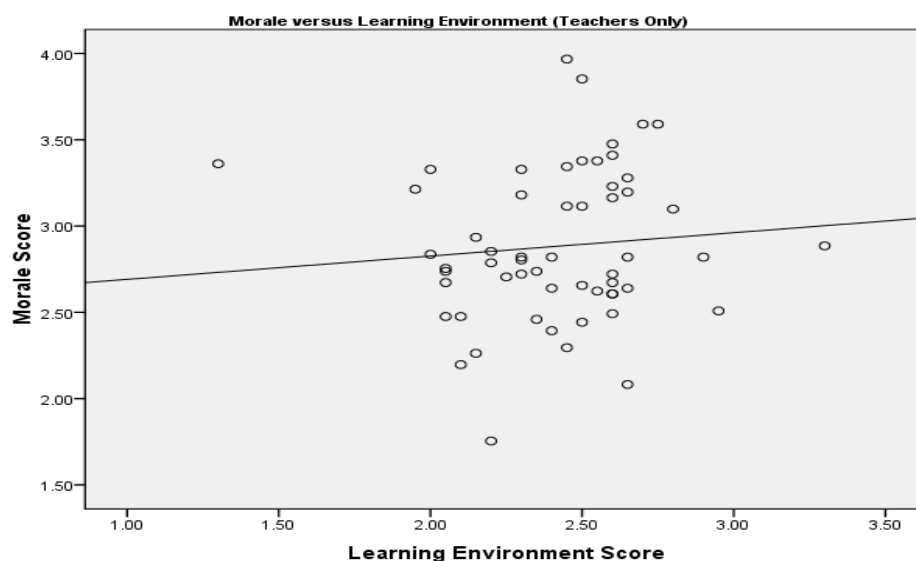


Figure 7. Scatter plot for teachers, indicating there is no trend between morale and learning environment scores for teachers.

Table 12 shows there was no statistically significant correlation between the morale and learning environment scores for teachers. The final result of the Pearson's correlation was $r(57) = 0.094$ and the p -value was 0.49. Therefore, it was evident that there is no relationship between the morale and learning environment scores for teachers.

Table 12

Correlations Between Morale and Learning Environment Scores for Administrators and Teachers

Academic role		Learning environment score	
Administrator	Morale score	Pearson's correlation	-.332
		Sig. (2-tailed)	.008
		No.	63
Teacher	Morale score	Pearson's correlation	.094
		Sig. (2-tailed)	.488
		No.	57

Third In-Depth Analysis

The third in-depth analysis was a multiple linear regression analysis which tested for an interaction between the learning environment score and role. As indicated in the second in-depth analysis, which showed that administrators had a higher mean learning environment score than teachers and showed a correlation between morale and learning environment for administrators but not teachers, the findings suggested that there may be an interaction effect between the learning environment score and role. In other words, the learning environment score may explain the difference in morale between teachers and administrators. The regression analysis along with the inclusion of the interaction between the learning environment score and role was repeated. An algebraic equation for the model incorporated the following: MOR = morale score, LE = learning environment score, ROLE = role (designation for administrator = 1; designation for teacher = 2), LEROLE = LE × ROLE (the product of LE times ROLE). The model that included the effect of ROLE on morale presented itself as the following algebraic equation: $MOR = 5.71 - 0.92 * LE + ROLE * (-1.58 + 0.53 * LE)$.

Table 13 shows that the learning environment score with $p = 0.013$, role with $p = 0.013$, and the interaction between the learning environment score and role $p = 0.028$, were all statistically significant. In other words, the difference in morale between teachers and administrators depended upon the level of the learning environment score.

Table 13
Coefficients of the Learning Environment Score and Role

Model	Unstandardized coefficients		Standardized coefficients		
	B	Std. error	Beta	<i>t</i>	Sig.
1 (Constant)	5.706	1.003		5.688	.000
Learning environment score	-.924	.365	-.833	-2.534	.013
Academic role	-1.575	.623	-1.911	-2.527	.013
LE/Role	.530	.237	1.428	2.231	.028

Note. The dependent variable is the morale score.

Thus, we see that the regression coefficient for ROLE was $(-1.58 + 0.53 * LE)$ as the regression coefficient for ROLE depended on the value of LE. If a group of teachers and administrators held an LE score of 1.5, the regression coefficient for ROLE was $(-1.58 + 0.53 * 1.5) = -0.785$. Therefore if teachers and administrators possessed a learning environment score of 1.5, the mean morale score was expected to be 0.785 points lower for teachers compared to administrators as a result of implementing the designation of 2 for a teacher. If a group of teachers and administrators possessed a learning environment score of 3.5, the coefficient for ROLE was $(-1.58 + .53 * 3.5) = 0.275$. Thus, if teachers and administrators held a learning environment score of 3.5, the average morale score would be 0.275 points higher for teachers compared to administrators. (The independent variable of ROLE was increased by one point.)

The model also demonstrates that when the learning environment score was close to 3.0, there was little or no difference in morale between teachers and administrators because when $LE = 3.0$, the regression coefficient for ROLE was close to zero, $(-1.58 + .53 * 3.0) = 0.01$. If teachers' and administrators' learning environment scores dropped below 3.0, the morale of teachers would become lower than administrators. If the learning environment score of teachers and administrators increased above 3.0, the morale of teachers would become higher than administrators. Table 14 shows that the adjusted *R*-square was only 0.056. Thus, the learning environment score, role, and the interaction between the learning environment score and role collectively explain only 5.6% of the total variance in morale scores.

Table 14

Model Summary of Variance in Morale Scores

Model	Adjusted <i>R</i> -square
1	.056

Note. The dependent variable is the morale score.

Summary of Results

The purpose of the study was to determine if there is a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable).

Three hypotheses were tested and analyzed as follows.

Hypothesis 1 results suggested that the average morale score was the same for teachers and administrators. Therefore, the null hypothesis was not rejected and it was

concluded that there was no difference in the average morale score between teachers and administrators.

Hypothesis 2 results indicated that there was no correlation between the morale score and the learning environment score. Therefore the null hypothesis failed to be rejected.

In response to Hypothesis 3, which stated that when controlling for the learning environment there was no difference in the level of morale between teachers and administrators, the analysis indicated that it was necessary to take into consideration their perception of learning environment factors. The null hypothesis was rejected and it was concluded that when controlling for the learning environment score, on average teachers tended to have a lower morale score than administrators.

Even though the three hypotheses were analyzed, three further in-depth analyses of the relationships between morale, learning environment, and role were conducted. The results of the first in-depth analysis, which compared the mean learning environment score between teachers and administrators, indicated that there was a statistically significant larger average learning environment score among administrators than among teachers.

In the second in-depth analysis, the morale and the learning environment scores were compared separately for teachers and administrators. The analysis attempted to explain how the relationship between morale and learning environment scores might be different for administrators and teachers. As a result of the analysis, it was found that administrators who viewed the learning environment factors as impacting negatively on

the learning environment had lower morale. Yet there was no trend between the morale and learning environment scores for teachers. Therefore, there was no statistically significant correlation between the morale and learning environment scores for teachers.

In the final in-depth analysis, a test was conducted to discover if there was an interaction between the learning environment score and role. The findings suggested that the interaction between the learning environment score and role was statistically significant. The difference in morale between teachers and administrators depended on the level of the learning environment score. Among teachers and administrators who perceived the factors to have a more positive impact on the learning environment, administrators tended to have higher morale than teachers. Among teachers and administrators who perceived the factors to have a more negative impact on the learning environment, administrators tended to have lower morale than teachers.

Section 5 will discuss the findings and significance of the research, and present recommendations for action and further study.

SECTION 5:

SUMMARY, CONCLUSIONS, RECOMMENDATIONS, AND COMMENTARY

Overview

In Canada, throughout the 20th century, there have been periods of collaboration between administrators and teachers' unions, as well as periods of unrest. The Ontario government passed the Education Quality Improvement Act, 1997 into law in December 1997. It removed administrators from teachers' federations in Ontario, Canada, thereby provoking a crisis. An unhealthy gap was set between administrators and teachers, causing a lowering of morale for both. The purpose of this study was to determine if there was a relationship between perceived effects of teachers' union actions in public schools on administrators and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable). For purposes of this study, perceived effects of teachers' union actions on roles of administrators and teachers were measured by the Learning Environment Questionnaire and referenced as the Learning Environment Score (LE).

The hypotheses for this study evolved through the literature review process. The literature revealed no clear answer as to what constituted union impact, nor was any conclusive correlation found between morale and perceptions of union impact. Additional information was needed to understand how perceptions of union impact might influence morale. Three hypotheses were tested for this study.

The first null hypothesis stated that the average morale score (MOR) is the same for teachers and administrators (ROLE). Hypothesis 1 was tested using a two-sample *t* test. The second null hypothesis stated that there is no correlation between the morale score (MOR) and the learning environment score (LE). Hypothesis 2 was tested using Pearson's correlation coefficient. The third null hypothesis stated that when controlling for the learning environment (LE), there is no difference in the level of morale (MOR) between teachers and administrators (ROLE). Hypothesis 3 was tested using multiple linear regression analysis.

In this quantitative study, the Canadian Education Association as well as the Ontario Principals' Council provided voluntary participants to participate in an anonymous survey on the Survey Monkey Web site. Fifty administrators and 50 teachers were required to complete the survey. Sixty-three administrators and 57 teachers responded. The treatment consisted of two questionnaires administered online to the sample group of administrators and teachers. The Teacher/Administrator Morale questionnaire was adapted from the Purdue Teacher Opinionnaire, which Houchard (2005) implemented in her study. The other survey instrument, the Learning Environment Questionnaire, which measured the perceived union impact, was adapted from practices in the Elementary Teachers Federation of Ontario (2007) handbook. Once validity and reliability for both instruments were established, a pilot project was conducted.

The findings of the study were as follows. Three hypotheses were tested and analyzed. Hypothesis 1 results suggested that the average morale score was the same for

teachers and administrators. Therefore, the null hypothesis was not rejected and it was concluded that there was no difference in the average morale score between teachers and administrators. Hypothesis 2 results indicated that there was no correlation between the morale score and the learning environment score. Therefore the null hypothesis failed to be rejected. In response to Hypothesis 3, which stated that when controlling for the learning environment there was no difference in the level of morale between teachers and administrators, the analysis indicated that it was necessary to take into consideration their perception of learning environment factors. The null hypothesis was rejected and it was concluded that when controlling for the learning environment score, on average teachers tended to have a lower morale score than administrators.

Even though the three hypotheses were analyzed, three further in-depth analyses of the relationships between morale, learning environment, and role were conducted. When comparing morale between teachers and administrators without controlling for the learning environment score, as in Hypothesis 1, there was no statistically significant difference in morale between teachers and administrators. Yet, when controlling for the learning environment score, as in Hypothesis 3, a statistically significant difference in morale between teachers and administrators was discovered. The interpretation of these findings indicated that the learning environment score impacted on the difference in morale between teachers and administrators. Further, in-depth analysis discovered that when the learning environment score between teachers and administrators was compared, the learning environment score was statistically significantly higher in administrators.

Therefore, administrators generally viewed the learning environment factors as impacting negatively; the teachers did not have this perception. The results of the first analysis, comparing the mean learning environment score between teachers and administrators, indicated that there was a statistically significant larger average learning environment score among administrators versus teachers.

In the second in-depth analysis, the morale score and the learning environment score separately for teachers and administrators were compared, in order to explain how the relationship between morale and learning environment scores might be different for administrators and teachers. Furthermore, as both administrators and teachers possessed different learning environment scores, it was suggested that the correlation between morale and the learning environment score might differ as well. The data analysis indicated a statistically significant and fairly strong correlation between the learning environment score and morale on the part of administrators, yet this correlation was not evident with respect to teachers. Thus, administrators who viewed the learning environment as being negatively impacted by the factors in the survey usually had lower morale. Yet, somehow, even if teachers viewed the factors as negatively impacting the learning environment or not impacting the learning environment, they did not perceive their morale as being affected either in a positive or negative manner.

In the final in-depth analysis, a test for an interaction between the learning environment score and role was conducted. The findings suggested that the interaction between the learning environment score and role was statistically significant. The

difference in morale between teachers and administrators depended on the level of the learning environment score. Administrators and teachers with a learning environment score near 3.0 possessed no difference in morale. Teachers, however, generally had lower morale than administrators where the learning environment score was below 3.0. Among teachers and administrators who perceived the factors to have a more positive impact on the learning environment, administrators tended to have higher morale than teachers whose learning environment scores were higher than 3.0. Among teachers and administrators who perceived the factors to have a more negative impact on the learning environment, administrators tended to have lower morale than teachers.

Interpretation of the Findings

After the three hypotheses were analyzed and further in-depth analysis was conducted, the findings indicated that, overall, the difference in morale between administrators and teachers depended on the level of the learning environment score. Administrators viewed the learning environment factors as impacting more negatively on the environment than did teachers. The relationship between the learning environment score and morale score was different for administrators and teachers; administrators who viewed learning environment factors impacting negatively on the learning environment possessed lower morale, while it appeared that teachers were not affected by these factors. If teachers and administrators viewed the impact of the learning environment factors as a positive versus negative, administrators possessed higher morale than teachers. However, if the impact of the learning environment factors was viewed as

negative by administrators and teachers, administrators possessed lower morale than teachers.

A larger body of literature assisted in gaining an understanding of these findings. The theoretical frameworks for this study focused on three theorists: Schön's (1987) learning, reflection, and change theory; Argyris' (1999) organizational learning theory, and Senge's (2006) systems theory. As this study dealt with hypotheses about perceived effects of teachers' union actions on administrators' and teachers' roles and their morale, Argyris' and Schön's (1974) double-loop theory as well as Senge's systems thinking served as theoretical frameworks in understanding the relationship between administrators and teachers' unions.

According to the double-loop theory model, complex problems can be solved by attempting to change underlying values and assumptions. This learning theory questions assumptions and changes them, resulting in different ways of doing things. As a theory of personal change, it focuses on professional education, especially on leadership in organizations. As the double-loop theory focuses on different ways of doing things, the study focused on what might be necessary on the part of administrators or teachers to improve their morale, especially that of administrators. It appeared that the learning environment impacted on the morale of the administrators and yet did not impact at all times on the morale of teachers.

Senge's (2006) systems thinking in a learning organization focuses on the whole versus the individual parts of the organization as critical. Personal mastery which

promotes lifelong learning, mental models which are ingrained assumptions that influence how we understand the world, shared vision which encourages innovation, and team learning which builds on personal mastery and shared vision constitute the framework of Senge's learning organization. Senge's theoretical framework, similar to the double-loop theory, focuses on different ways of doing things through innovation in a learning organization such as administrators and teachers are involved in.

Based on the three hypotheses and the in-depth analyses, the findings of this study reflect Senge's (2006) systems thinking—they can begin to be understood through mental models, team learning, personal mastery, and shared vision. Mental models, similar to the assumptions in Argyris and Schön's (1974) double-loop theory, are significant indicators. Perhaps the perceptions of both administrators and teachers could be investigated as a team, provided there was the willingness to do so. As the learning environment does have an impact on morale of administrators, Schön's (1987) *reflection-in-action* and *reflection-on-action* might influence administrators and teachers as they begin to understand the relationship between morale and the learning environment.

Practically speaking, the results of the study could be shared with not only administrators and teachers through the Ministry of Education, Ontario Principals' Council, Canadian Education Association, and Elementary Teachers Federation of Ontario, but also with study participants who were interested in the findings, and boards of education throughout Ontario whose leadership teams promote professional learning. Perhaps there might be a discussion of the results in that the morale of administrators was

affected negatively by the learning environment factors and yet the teachers' morale was not affected either way by the learning environment factors. There might need to be an analysis of the specific items on the questionnaires that caused concern for administrators. This might lead to further social change and recommendations for action as discussed in the following section.

Implications for Social Change

Walden University's mission statement defines positive social change as the "improvement of human and social conditions" (Walden Catalogue, 2007, p. 4). The results of this study indicated that the learning environment impacted significantly on the morale of administrators throughout Ontario and Canada. The findings have implications for the improvement of the human condition and social change through the improvement of administrator morale. The relationship between morale, school culture and climate, and ultimately student achievement will be discussed. Tangible improvements will be suggested for administrators, teachers' unions, and educational associations.

As previously discussed (in section 2), morale characterizes the quality of academic life in a school and is associated with certain behaviors (Johnsrud, Heck, & Rossner, 2002, ¶ 1). It includes attributes such as satisfaction with the work environment, enthusiasm, loyalty to the institution, and dedication to common goals. Leithwood and Elementary Teachers Federation of Ontario (2006; hereafter, Leithwood & ETFO) discussed morale as a sense of trust, confidence, enthusiasm, and friendliness among

teachers. The results of the study clearly indicated that there were significant concerns with the morale of administrators.

Morale is often considered part of the culture or climate of a school. Kelley et al. (2005) researched school climate and compared relationships between selected dimensions of leadership and measures of school climate in a Likert-type survey conducted in 31 elementary schools in the state of Nevada. They cited Hoy and Miskel's (in Kelley et al., ¶ 12) definition of school climate as different characteristics from one building to another that influence behavior with regard to staff performance, promotion of higher morale, and improvement of student achievement. They also cited Kottkamp's (1984) definition of school climate as consisting of shared values and commonly held definitions of purpose. Results indicated that teachers' perceptions of their principals' effectiveness were related to school climate. If teachers perceived that their principals acted appropriately in situations then they indicated that the school had such commonly held definitions of purpose as good communications, high level of advocacy for teachers, and participatory decision making.

School culture, including the aspect of morale, has also been examined as to how it enhances or hinders learning (Deal & Peterson, 2004). Shaping culture is even more important because of the focus on standardized testing and accountability. A leader's greatest challenge might be to change an unhealthy school culture into a healthy one (Barth, 2002). Culture exists as a complex pattern of norms, attitudes, beliefs, behaviors, values, ceremonies, tradition, and myths. For Barth, school culture had more influence on

learning than anything else; thus, a school's culture could work for or against improvement and reform.

According to Barth (2002), changing school culture required courage and skill on the part of both teachers and administrators. He suggested ways of changing existing school culture and addressing any toxic elements in it, so as not to remain victimized by them. One way he proposed was to discuss the non-discussables—that is, subjects discussed in the parking lot, restroom, or dinner table, but never at a staff meeting. One non-discussable would be the leadership style of the principal; another would be the way decisions were being made. As a rule, the fewer the non-discussables, the healthier the school; the more non-discussables, the more pathology in the school culture (Barth, ¶ 12).

The literature review supports the assertion that morale and school culture impact on student achievement. Social change is accomplished through increased student achievement, which leads to an improved human condition not only for the students themselves, but for the communities in which they live and work and for their families, children, and grandchildren.

To accomplish this social change, the morale of administrators could be improved by altering the perceived union effects on the learning environment. To address these union effects, several recommendations are offered. One option is modeled by the Teacher Union Reform Network (TURN), a collaborative effort of urban schools and teachers' unions in the Union States. By including educational and instructional issues, TURN negotiated a living contract that included a commitment to view collective

bargaining as collaboration rather than positional, adversarial fights. Trust and cooperation need to replace the mistrust and hostile relationships from the past. Unions and management need to go beyond the traditional bread-and-butter issues, expanding such areas of school reform as student assessment, professional development, and peer evaluation. As they prioritized the needs of students, they decided to use the collective bargaining process to encourage more effective schools and an authentic profession for teachers so that they were recognized in a positive manner (Urbanski, 1998).

A further significant social change might be considered—teachers in Ontario and Canada could have the option to belong to a teachers' union, as teachers do in the United States. As the study suggested, the impact of the learning environment, based on certain philosophies of ETFO, had a significant effect on the morale of administrators. As the literature review in section 2 indicated, Ontario and Canada are historically and politically union oriented; hence, this suggestion might meet with resistance from constituents. However, the reality exists in the United States that teachers have the option to belong to teachers' unions.

In summary, this study's implications for positive social change focus on the improvement of the human condition through increased student achievement. Student learning is impacted by the culture of the school, of which administrator morale is a component. The findings of this study indicated that administrator morale is negatively impacted by the learning environment created by perceived union activities. To improve administrator morale as impacted by perceived union effects on the learning environment,

administrators and teachers are encouraged to investigate the TURN model which promotes collaboration and prioritizes the needs of students. As well, teachers are encouraged to also consider the option of belonging to a teachers' union which might be a possibility in bringing about positive social change for Ontario and Canadian teachers.

Recommendations for Action

In light of the implications for social change, the results of the study can be highlighted to key stakeholders. It is hoped that the Ontario Ministry of Education would review this study's findings and support both administrators and teachers in developing policies to build collaborative working relationships, much as the Urbanski (1998) research, through TURN, has influenced union relationships in the United States. As well, the results might be disseminated to the Ontario Principals' Council, the Canadian Education Association, and any participants who contacted the researcher and requested a copy of the findings. These findings could be shared with the Elementary Teachers Federation of Ontario as well as interested boards of education throughout Ontario.

Overall, those involved in education look at a different way of doing things, à la Argyris and Schön's (1974) double-loop theory. Perhaps Ontario and Canadian educational institutions need reform, and not in only elementary schools but also in secondary schools and in the colleges of education where teacher training takes place. Perhaps teacher candidates need to be aware of this study as they enter the field of education.

Since there has been no similar significant research in Canada on this topic, researchers will appreciate the significance of the data as they pertain to school districts throughout Canada. The theoretical frameworks—Argyris (1999), Schön (1987), Argyris and Schön's (1974) double-loop theory, and Senge's (2006) systems theory—could help educators (including administrators and teachers) and political leaders understand the importance of relationship in the bigger picture of the learning organization. Globally, these theoretical frameworks can apply to any organization where there needs to be a sense of stability.

Recommendations for Further Study

The present study focused on the impact of the teachers' union on the morale of administrators and teachers. In this quantitative study, data were collected as a numeric description of a sample that might be applied to a larger population. The data analysis was based on two questionnaires.

Further studies might investigate why the teachers' morale was not affected by the learning environment, as was the administrators' morale. Perhaps the following question might be asked: "Is the morale of teachers not affected in the same manner as administrators' morale because teachers belong to a union and are protected?" This question could become a further hypothesis for investigation. According to Zigarelli (as cited in Leithwood & ETFO, 2006), poor teacher morale was seen in less effective teaching performance, teacher absenteeism, resistance to change, and teacher turnover.

Therefore, the correlation between these variables and student achievement might be investigated.

Further research might include two different frameworks for a study. A qualitative study, interviewing individual teachers in Ontario (as well as using focus groups, if necessary) could be conducted. The interviews and focus groups might take place outside of Ontario, as a possibility. From this study's sample, it is evident that administrators, not only in Ontario but throughout Canada, are uncomfortable with the impact of the union on the learning environment. A mixed-methods study could be conducted, along with an increase the number of participants, even though there were already 63 administrators and 57 teachers in the present study.

Since this study involved only elementary school administrators and teachers, further studies could take place in the secondary schools. According to Leithwood's (2008) research, the working conditions for teachers in the secondary panel are more appealing to educators than the working conditions in the elementary panel. Therefore, a hypothesis that seeks to determine if the morale of secondary school administrators and teachers differs from their elementary counterparts might be proposed.

This study welcomed participants from across Canada and yet the actual geographical location of the participants was unknown. Therefore, perhaps further in-depth studies could focus on specific geographical areas, both urban and rural, throughout Canada. Other demographic variables through Survey Monkey might be investigated, since the participants were anonymous. Such variables could include gender, age,

experience, difference in leadership responsibilities, and academic background of both administrators and teachers.

In section 2 (the literature review) some of these variables were discussed as to how they related to teacher morale. Jones (1995) implemented a teacher decision-making instrument (TDI) and his findings indicated that teachers with 20 years or more experience, who were aged 50 years or older and taught primary grades, exhibited higher morale. Bivona (2002) discovered that teachers with more than 10 years of experience had more positive attitudes toward teaching than did less experienced teachers. Bivona felt that less experienced teachers could raise their morale and become more effective if they were to network with veteran teachers.

The Purdue Teacher Opinionnaire (PTO; as cited in Houchard, 2005), gauged morale and discovered that there was a moderately high level of teacher morale. Satisfaction with teaching contributed to higher morale, whereas the issue of salary lowered morale. Blackbourne and Wilkes (1987) discovered that younger teachers exhibited higher morale than older teachers. However, Gore (1983) discovered there was no significant difference in morale between male and female teachers, no significant differences in the various areas of Tennessee, and no significant difference in levels of degrees between teachers. A significant difference showed that older teachers responded more positively to morale incentives than younger teachers did.

In summary, further studies might take place to investigate administrator morale in depth, based on the suggested variables not previously discussed. Further studies might

also investigate the attrition rate of administrators because of the morale issue.

Ultimately, the goal would be to ensure that administrators' morale is not negatively impacted by the learning environment so that student achievement does not suffer.

Concluding Statement

The purpose of the study was to determine if there was a relationship between perceived effects of teachers' union actions on administrators' and teachers' roles (independent variables) and administrators' and teachers' morale (dependent variable). Sixty-three administrators and 57 teachers voluntarily participated in this anonymous survey on Survey Monkey.

Results indicated that the learning environment impacted the morale of administrators more significantly than it did teachers, who might not have felt any impact. The ongoing dilemma was how to understand the reason that teachers did not seem to react in the same manner as administrators. Results will fill the gap between research and practice, and address the need for further knowledge concerning the correlation between teachers' morale and the learning environment. As well, the findings may encourage further dialogue as to how to reduce the anxiety on the part of administrators as a result of the negative learning environment.

Implementing Senge's (2006) systems model, the Ontario Minister of Education and other provincial ministers need to review the findings in order to begin the reform process in building a collaborative working relationships between administrators and teachers. If the Minister of Education reviews the findings of this study that indicate there

is a concern about administrators' morale based on the learning environment factors influenced by the teachers' unions, then perhaps serious discussion needs to take place with all constituents so that Ontario's educational system does not lose competent administrators because of a morale issue.

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APPENDIX A:

LETTER OF COOPERATION COVER LETTER

Dear Fellow Educator,

I am a doctoral candidate in Educational Leadership at Walden University, Minneapolis, MN. I am currently conducting a study for my doctoral program to determine if there is a relationship between the learning environment (i.e., factors that might impact upon the quality of education a child receives) and the morale of administrators and teachers.

I contacted your association, the Canadian Education Association, and you indicated that you would be willing to assist in gaining participants for my study by inserting a brief descriptor in your next newsletter to your members.

However, I need your permission in writing before I start the process.

FYI, I plan to use two instruments for the study: the *Learning Environment Questionnaire*, comprising 20 questions, and the *Teacher/Administrator Morale Questionnaire*, comprising 61 questions. These instruments were used for the sole purpose of gathering data for the study and should only take a few moments of the participants' time. The questionnaires are located on the Survey Monkey web site at www.surveymonkey.com.

Participants' input is essential to the success of my study. Because these surveys remain nameless, anonymity is guaranteed. Again, participation is completely voluntary on the participants' part.

For a complete study, I would like to include approximately 50 administrators and 50 teachers.

If you have any questions, please feel free to contact me by email at eileen.berg@rogers.com. The results of this study will be available to you upon your request.

I would appreciate written confirmation from your association so I can proceed by sending you the link to the website.

Sincerely,

Eileen Berg

Eileen Berg

APPENDIX B:

CEA APPROVAL TO CONDUCT RESEARCH

From: Luke Rodgers
To: Eileen Berg
Sent: Friday, July 25, 2008 9:49 AM
Subject: RE: Notification of Approval to Conduct Research-Eileen Berg]

Hi Eileen,

We have considered your request and decided that we will position your study and invitation to participate as a Research Initiative featured in the New and Noteworthy section of the CEA website, where it will get exposure equivalent to or greater than in our newsletter. We intend to present the following description:

"Invitation to Participate in a Doctoral Study

"Eileen Berg, a doctoral research student affiliated with Walden University, Minneapolis, MN, is seeking participants who are teachers or administrators to complete two online surveys to determine if there is a relationship between the learning environment (i.e. factors that might impact upon the quality of education a child receives) and the morale of administrators and teachers. These surveys should only take approximately 5–8 minutes. There will be complete anonymity through the use of Survey Monkey as the tool. Any information you provide will be kept confidential. Your participation in the survey will result in your implied consent. The survey will be open until....

"To complete the survey click(URL for Survey Monkey questionnaire)."

If this is looks okay to you, please send us the URL and the closing date for survey responses.

Luke

Luke Rodgers
Research Assistant - Adjoint à la recherche
Canadian Education Association canadienne d'éducation
317 Adelaide Street West, #300
Toronto, ON M5V 1P9
Tel/Tél. : 416-591-6300 ext/poste 233
Fax/Télec.: 416-591-5345

APPENDIX C:

ONTARIO PRINCIPALS' COUNCIL APPROVAL

Ontario Principals' Council
180 Dundas Street West, 25th Floor
Toronto, ON M5G 1Z8

Tel: (416) 322-6600
Fax: (416) 322-6618
E-mail: admin@principals.on.ca
Website: www.principals.on.ca

ISO 9001 Registered

July 14, 2008

Eileen Berg
22 Tullamore Drive
TORONTO ON M2L 2E8

Dear Eileen Berg,

This letter is to confirm that the Ontario Principals' Council (OPC) has agreed to your request to provide the opportunity for members to participate in a survey in connection with a study you will be conducting. You will provide OPC with the link to your website and we will include this information in the news bulletin that goes out to members from the OPC Education Leadership Canada.

OPC is not responsible for ensuring a guaranteed number of participants or the results of the survey.

Yours truly,

A handwritten signature in black ink that reads "Joanne Robinson". The signature is written in a cursive style with a large, looped initial 'J'.

Joanne Robinson
Program Coordinator
OPC Education Leadership Canada

APPENDIX D:

INVITATION TO PARTICIPATE IN A DOCTORAL STUDY

I am a doctoral student in Educational Leadership and am conducting a study for my dissertation. These two surveys should take approximately five to eight minutes to complete. Any information you provide will be kept confidential, and the complete anonymity of participants is assured through the use of Survey Monkey as the tool. Your participation in the survey will result in your implied consent.

The link to be attached to this invitation is:

http://www.surveymonkey.com/s.aspx?sm=IHJI_2b4uhSwSQb_2buDnf3koQ_3d_3d

APPENDIX E:

IMPLIED INFORMED CONSENT FORM – TEACHERS/ADMINISTRATORS

Page 1 of 2

You are invited to take part in a research study dealing with the morale of administrators and teachers. Please read this form and feel free to ask any questions before agreeing to be part of the study.

This study is being conducted by a researcher named Eileen Berg, who is a doctoral student at Walden University, Minneapolis, MN.

Background Information:

The purpose of this study is to determine if there is a relationship between the learning environment (i.e., factors that might impact upon the quality of education a child receives) and the morale of administrators and teachers.

Procedures:

If you agree to be in this study, you will be asked to respond to two online questionnaires. You should be able to complete the questionnaires in five to eight minutes.

Voluntary Nature of the Study:

Your participation in this study is voluntary. This means that everyone will respect your decision to participate in the study or not. If you decide to join the study now, you can change your mind later and stop at any time. You may skip any questions that you feel are too personal.

Risks and Benefits of Being in the Study:

Risks are minimal as you will remain anonymous. Participants could possibly benefit from taking a survey of this nature by taking the time to reflect on their own morale and what possibly motivates them individually as either an administrator or a teacher.

Compensation:

Participants will not be compensated for their time.

Confidentiality:

Any information you provide will be kept confidential. Confidentiality for the participants was a primary concern for this research. The researcher will not use your information for any purpose outside of this research project. Also, the researcher will not include your name or anything else that could identify you in any reports of the study. As this is a Web-based survey, anonymity was provided by not collecting IP addresses. No one will be able to identify you or your answers, and no one will know whether you participated in the study or not.

Contacts and Questions:

The researcher's name is Eileen Berg. The researcher's faculty advisor is Pamela Harrison. You may contact the researcher via email at eileen.berg@rogers.com or via 416-445-4272 (home). You may contact the advisor at pamela.harrison@waldenu.edu or via 254-772-2341 (school). If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Director of the Research Center at Walden University. Her phone number is 1-800-925-3368, extension 1210.

The researcher will send you a copy of this form for your records.

Statement of Consent:

Your completion and submission of the survey to the researcher represents your consent to serve as a subject in this research. By clicking the button below, you are providing consent to participate in the study.

Researcher's Written or
Electronic* Signature

APPENDIX F:

PERMISSION TO USE PURDUE TEACHER OPINIONAIRE



OFFICE OF GRADUATE STUDIES

December 13, 2007

Ms. Eileen Berg
22 Tullamore Drive
Toronto, Ontario
M2L2E8

Dear Ms. Berg,

Permission is no longer required to use the Purdue Teacher Opinionaire.

Sincerely,

A handwritten signature in cursive script that reads "Kathryn A. Dietz".

Kathryn A. Dietz
Manager

College of Education, Academic Services

Beering Hall of Liberal Arts and Education, Room 6104 ■ 100 N. University Street ■ West Lafayette, IN 47907-2098
(765) 494-2345 ■ Fax: (765) 496-9449 ■ www.education.purdue.edu/gradoffice

18	The curriculum of our school is in need of major revisions.	1	2	3	4
19	I love my job.	1	2	3	4
20	If I could plan my career again, I would choose the same job.	1	2	3	4
21	Experienced staff members act as mentors to new staff.	1	2	3	4
22	If I could earn as much money in another occupation, I would change jobs.	1	2	3	4
23	Timetabling at my school places classes at a disadvantage.	1	2	3	4
24	My superior makes my work easier and more pleasant.	1	2	3	4
25	Keeping up professionally is too much of a burden.	1	2	3	4
26	Our community makes its teachers feel as though they are a real part of the community.	1	2	3	4
27	My job affords me the security I want in an occupation.	1	2	3	4
28	My superior clearly understands and recognizes my job responsibilities.	1	2	3	4
29	The lines and methods of communication between teachers and the principal in our school are well developed and maintained.	1	2	3	4
30	My work load at this school is unreasonable.	1	2	3	4
31	My superior shows a real interest in my job.	1	2	3	4
32	My work load unduly restricts my non-professional activities.	1	2	3	4
33	I find my contacts with students, for the most part, highly satisfying and rewarding.	1	2	3	4
34	I feel that I am an important part of this school system.	1	2	3	4
35	The professional development opportunities provided to our teachers encourages collegial relationship building.	1	2	3	4
36	I feel successful and competent in my present position.	1	2	3	4
37	I enjoy working with student organizations, clubs, and societies.	1	2	3	4
38	Our staff room is a pleasant place to be.	1	2	3	4
39	Through our Professional Learning Communities, we continue to build positive relationships.	1	2	3	4
40	Our school staff has a tendency to form into cliques.	1	2	3	4
41	The teachers in our school work well together.	1	2	3	4
42	Our school provides adequate clerical services for teachers.	1	2	3	4
43	As far as I know, staff think I am good at my job.	1	2	3	4
44	I am exposed to “stress and strain” that makes my job undesirable for me.	1	2	3	4
45	I do not hesitate to discuss any school problems with my superior.	1	2	3	4
46	My job gives me the prestige I deserve.	1	2	3	4

47	The salary schedule in our board adequately recognizes my competency.	1	2	3	4
48	Most of the people in this community understand and appreciate good education.	1	2	3	4
49	This community respects its teachers and treats them like professional persons.	1	2	3	4
50	My superior acts interested in me and my problems.	1	2	3	4
51	My superior supervises rather than “snoopervises” me.	1	2	3	4
52	Meetings as now conducted by my superior waste my time and energy.	1	2	3	4
53	My superior has a reasonable understanding of the problems connected with my job.	1	2	3	4
54	Most of the actions of students irritate me.	1	2	3	4
55	The cooperativeness of teachers in my school helps make my work more enjoyable.	1	2	3	4
56	My students regard me with respect and seem to have confidence in my professional ability.	1	2	3	4
57	Our students gain an appreciation of positive values and attitudes throughout the day in our building..	1	2	3	4
58	Our College of Education’s professional ethics promotes a collegial relationship for new staff members.	1	2	3	4
59	Creativity and initiative are highlighted throughout our building.	1	2	3	4
60	My superior makes effective use of my capacity and talent.	1	2	3	4
61	I feel free to go to my superior about problems of personal and group welfare.	1	2	3	4

APPENDIX H:

LEARNING ENVIRONMENT QUESTIONNAIRE

This instrument is designed to provide you with the opportunity to express your opinions about the learning environment for yourself as an educator. There are no right or wrong responses, so do not hesitate to mark the statements honestly. Please **do not** record your name on this document.

Please indicate your academic role:

Administrator

Teacher

What impact do you think the following requirements would have on the learning environment for educators?

1. Making teachers' attendance at staff meetings optional.

very negative negative positive very positive

2. Making teachers' attendance at extracurricular activities optional.

very negative negative positive very positive

3. Making teachers' attendance at interview evenings optional.

very negative negative positive very positive

4. Making teachers' attendance at school concerts/community celebrations optional.

very negative negative positive very positive

5. Making teachers' attendance at field trips optional.

very negative negative positive very positive

6. Not allowing teachers to drive students on field trips.

very negative negative positive very positive

7. Encouraging the administrator to mentor whomever he or she feels is the most qualified teacher.

very negative negative positive very positive

8. Encouraging teachers to contact the superintendent if there is a conflict between administrators and teachers.

very negative negative positive very positive

9. Allowing teachers to resolve disputes among themselves informally.

very negative negative positive very positive

10. Requiring teachers to have only one goal in their Annual Learning Plan.

very negative negative positive very positive

11. Making teachers' attendance at lunch meetings optional.

very negative negative positive very positive

12. Making it optional for teachers to meet with administrators during their preparation time.

very negative negative positive very positive

13. Allowing teachers to leave the school building at recess without notifying the administration.

very negative negative positive very positive

14. Allowing teachers to leave a staff meeting after 90 minutes.

very negative negative positive very positive

15. Not requiring teachers to attend divisional meetings.

very negative negative positive very positive

16. Discouraging professional development as part of staff meetings.

very negative negative positive very positive

17. Allowing teachers the right to remove a comment from their performance appraisal that deals with inappropriate interpersonal relationships.

very negative negative positive very positive

18. Encouraging the administrator to effectively perform his/her responsibilities for assigning teachers' timetables as curriculum leader of the building.

very negative negative positive very positive

19. Discouraging administrators' attendance at union meetings.

very negative negative positive very positive

20. Encouraging teachers to arrive at school as little as 15 minutes before the bell.

very negative negative positive very positive

CURRICULUM VITAE

EILEEN E. BERG

EDUCATION

2006–2008	Walden University Doctor of Education, Administrator Leadership	Minneapolis, MN, U.S.A.
2000–2002	University of Calgary Master of Continuing Education	Calgary, Alberta
1974	York University Bachelor of Education	Toronto, Ontario
1970	University of Toronto Bachelor of Education, French and Drama	Toronto, Ontario
1969	York University Bachelor of Arts, French and Sociology	Toronto, Ontario

PROFESSIONAL EXPERIENCE

2000–2008	York Region District School Board <i>Principal of English and French Immersion Elementary School</i>	Toronto, Ontario
1998–2000	Toronto District School Board <i>Vice-Principal of English and French Immersion Elementary School</i>	Toronto, Ontario
1985–2000	Toronto District School Board <i>Teacher of French, Drama, Guidance, Core, Convenor, Lead Teacher in Community Outreach, Counselling</i>	Toronto, Ontario
1980–1985	Toronto District School Board <i>Freelance Drama Specialist, Supply Teacher</i>	Toronto, Ontario
1974–1980	Toronto District School Board <i>Supply Teacher</i>	Toronto, Ontario
1970–1974	Toronto District School Board <i>Secondary School Teacher, French and Drama</i>	Toronto, Ontario

PROFESSIONAL CERTIFICATION

2007	Dealing with Difficult People (Stitt, Feld, Handy)	Toronto, Ontario
2006	Alternative Dispute Resolution (Stitt, Feld, Handy)	Toronto, Ontario
2005	Emotional Intelligence (OPC)	Toronto, Ontario

PROFESSIONAL MEMBERSHIPS

Ontario College of Teachers (OCT)	Toronto, Ontario
Ontario Principals' Council (OPC)	Toronto, Ontario
York Region Administrators Council (YRAC)	Toronto, Ontario