

Université de Montréal

Types of relations between states and organized teachers
as exemplified in education reform

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SOMMAIRE

Partout dans le monde industrialisé, le regroupement des enseignants des écoles publiques a eu un impact sur l'élection des gouvernements et des officiers scolaires (là où ils sont élus), sur les politiques éducatives et sur l'organisation scolaire. Par ailleurs, les institutions nationales et les politiques éducatives façonnent les stratégies d'action accessibles aux associations d'enseignants. Une bonne compréhension de l'influence des relations entre l'état et les associations d'enseignants sur la nature et le processus de réforme scolaire peut aider les gouvernements et les syndicats d'enseignants à apprécier l'importance de leurs rôles respectifs dans la réforme de l'éducation et le maintien des sociétés démocratiques. La démarche suivie pour la présente étude comprend d'abord la construction d'une typologie des relations de travail, de classe, et de partenariat. Ensuite la description et l'explication de 3 cas illustrent la typologie. La dernière étape porte sur la reformulation de la typologie. Quatre méthodes utilisées dans la présente étude renforcent la validité, contribuent au développement théorique, et rendent possible l'explication des relations entre l'état et les organisations d'enseignants dans d'autres contextes similaires : (a) la prise en compte de 3 conditions essentielles d'une méthodologie comparative; (b) une approche systématique à la collecte et à l'analyse de données; (c) l'explication constante des caractéristiques connues d'un cas dans le cadre d'un modèle idéal-type; et (d) l'utilisation de référents externes contextualisant les descriptions des cas et comparant les cas à la typologie préliminaire et les uns aux autres.

Mots clés: l'éducation comparée
 la professionnalisation de l'enseignant(e)
 la régulation gouvernementale
 le syndicalisation de l'enseignant(e)

ABSTRACT

In western industrialized countries, the organization of public school teachers impacts the election of governments and schools officials, education policy, and school organization. Conversely, each country's institutions, education policy, and relations with organized teachers shape the strategies available to organized teachers. Understanding the influence of organized teachers and state relations on the process and the nature of education reform can assist organized teachers and states to appreciate the importance of their respective roles in the reform of public education and the maintenance of democratic societies. The procedure followed is first, the construction of a preliminary typology to describe labour, class and partner relations. Second, the rich description with explanation of 3 cases exemplifies, and enables the assessment of the preliminary typology. The final step is the reformulation of the typology. Four methods used in the present study are intended to strengthen validity, contribute to theory development, and permit the explanation of state and organized teacher relations in other similar contexts. First is attention to 3 conditions essential to comparative methodology. Second is a systematic approach to data collection and analysis. Third is the insistent explanation of the known qualities of a case by use of an ideal-typical model. Fourth is the use of external references by placing the case descriptions in context and comparing cases to the preliminary typology and to one another.

Key words: comparative education
government regulation
teacher professionalization
teacher unionism

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ABBREVIATIONS

AEU	Australian Education Union
AEU Vic	Australian Education Union, Victoria Branch
AIRC	Australian Industrial Relations Commission
Board	Board of Education (SK, QC)
C & I Committee	Curriculum and Instruction Review Committee (SK)
CCF	Co-operative Commonwealth Federation
CEQ, the Centrale	Centrale de l'enseignement du Québec [Québec Centrale (Federation of Unions) of Teaching]
CIC	Corporation des enseignants du Québec [Québec Corporation of Teachers]
CMEC	Council of Ministers of Education, Canada
Coalition	Liberal Party and National Party (conservative) (Vic)
Conseil	School governing board (QC)
CSE	Conseil supérieur de l'éducation [Superior Education Council]
The Department or SK Ed, previously SETE	Department of Education, Saskatchewan Education, previously Saskatchewan Education, Training and Employment
DOE, renamed DEET	Department of Education renamed Department of Education, Employment and Training (Vic)
FSE	Fédération des syndicats de l'enseignement [Federation of unions of teaching]
MCEETYA	Ministerial Council on Education, Employment, Training and Youth Affairs (Australia)
MEQ, the Ministère	Ministère de l'Éducation du Québec [Québec Department of Education]
MLAs	Members of the Legislative Assembly (SK)
NDP	New Democratic Party
OECD	Organization for economic cooperation and development
PL, Libéraux	Parti libéral
PQ, Péquistes	Parti québécois
QC	Québec
SAIP	School Achievement Indicators Program (Canada)
SK	Saskatchewan
STF, the Federation	Saskatchewan Teachers' Federation
Vic	Victoria, Australia

DEDICATION

This work is dedicated to teacher researchers,

especially

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*We have gathered a posie of other men's flowers,
Naught but the thread that binds them is ours.*

Author Unknown

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CHAPTER ONE

THE PROBLEM

Several authors attribute the impetus for education reform internationally since the mid 1970s, to interests external to the education system (Berube, 1988; Brown, Seddon, Angus, & Rushbrook, 1996; Cohen, 1990; Lessard & Brassard, 1997; Murphy, 1992; Tyack, 1990). These authors perceive the motivation for reform to be primarily economic and linked to competition in global markets. Education, once touted as a source of prosperity, is maligned for economic failures. Critics imply that links between education and industry need to be strengthened. As management seeks flexibility and creativity to gain a competitive edge in international markets, the nature of work and work organization changes. In this post-industrial era, work organization purportedly eliminates low-skilled work, expands jobs requiring higher skill levels, and enables more participatory forms of work organization. The demand on schools is to improve intellectual competence and not just increase the number of graduates (Cohen, 1990; Finn & Rebarber, 1992; Howard, 1995).

Work and education are entwined in political and social as well as economic structures. Publicly funded education exists in this system of interdependent relationships and challenges. No one challenge can be addressed independently of the others. Different ideologies and social interests are contested in the purposes of schooling (Popkewitz, 1987), and connections between power and knowledge are increasingly perceived to explain education reforms (Welch, 1991).

Teacher organizations are an integral part of the education system, and their evolution is important to the development of education and the teaching profession (Okot, 1986; Paton, 1962; unless noted as attributable to the original source, italics throughout the thesis are added to assist the reader to focus on the salient points). Various authors contribute to an understanding of the purposes for the organization of teachers (Barlow & Robertson, 1994; Fredriksson, 1998; Goble, 1990; Grace, 1987; Hanley, 1998; Humphries, 1996b; Jessup, 1985; Manzer, 1969; Okot, 1986; Robertson, 1996; Shedd & Bacharach, 1991). With a history rooted in missionary work, teachers first came

together for professional exchange and inservice. Organized teachers' purposes soon broadened to include functions protective of teachers as workers. Teacher unions traditionally are also strong advocates for public education and social justice. The present study recognizes and builds upon these *three historic purposes of teacher organizations: teacher professionalism, economic welfare, and social advocacy*. The present study acknowledges the tensions inherent in these multiple goals.

The organization of public school teachers has had an impact internationally on public elections, education policy, and school organization (Cooper, 1992; Kerchner & Mitchell, 1988; Lawn, 1985; McDonnell & Pascal, 1988). Conversely, a country's institutions and education policy shape the strategies available to organized teachers (Cooper, 1992; Grace, 1987; Humphries, 1996b; Kerchner, 1992; Lawn, 1985; Robertson, 1996; Shanker, 1992; Spaul, 1992). *The union's relations with the state also strongly influence organized teachers' choice of strategies* (Grace, 1987; Tardif, 1995).

Beginning in the 1970s, western governments often initiated education reform based on an ideology differing from that traditionally espoused by teachers. In response, teacher unions perceive a need for renewed advocacy for public education and teacher professionalization. Many teachers also face legislated changes that reframe labour laws, renege on collective agreements, and diminish teacher union mandates in government efforts to control education reform (Grace, 1987; Hanley, 1998; Humphries, 1996b; Jones, 1985; Marshall & Peters, 1990; Robertson, 1996; Spaul, 1997; Walsh, 1987).

In contrast, education reform in some cases is not characterized by the legislated disruption of teacher unions. *How can organized teachers and state relations be characterized? What accounts for differences in relations? How do relations between organized teachers and states interact with education reforms and reform processes?* These are the questions this thesis seeks to answer.

Purpose

The purpose of the present research is to explain diverse types of relations between states and organized teachers with reference to the nature and process of education reform.

Terminology

For the present study, '*relation*' is attributed the meaning given in the Oxford English Reference Dictionary (Pearsall & Trumble, 1995). Relation is defined as "the way in which one person or thing is related to another; the existence or effect of a connection, correspondence, contrast, or feeling prevailing between persons or things" (p. 1216). The existence of a connection between the state and organized teachers is established in law and shaped by practice.

The term '*state*' encompasses both politicians in government and bureaucrats with leadership responsibilities in the administration of a government department or ministry of education. Carnoy (1992) and Goodlad (1997) perceive the relationship between the state and civil society to be fundamental to understanding the evolution of *publicly funded (public) education*. The state is responsible for the development of public education policy and instituting methods to regulate education. Different values held by society, and the different ideologies of political parties in power, influence education goal setting over time. '*Government*' is used to refer to the political, rather than the combined political and administrative body of a state and to refer to specific cases.

Teachers, like other workers, seek protection of their rights and advocate for their interests through collective action in organizations. '*Organized teachers*' are perceived to attend to economic welfare and to uphold professional practice. The dual purpose has led to debate. Are teacher organizations *unions* operating in a bureaucratic environment regulated by law and contract? Are teacher organizations *professional associations* responsibly seeking and upholding high trust in a relatively unregulated practice based on "internalized standards of behavior and judgment" (Fukuyama, 1995, p. 224)? The dualities in the teacher union paradox "may be constructed as contending opposites or as

interdependent and complementary ‘apparent’ contradictions” (Poole, 1995, p. 23). Any discussion must account for “the contradiction between professional autonomy and management prerogatives and the links between the industrial and the professional. These matters cannot be denied, but should be recognised and built on” (Preston, 1996, p. 258). Similarly Seddon and Brown (1997) observe, “One thing is clear, consolidating the political and economic basis of teaching, and the status of teachers, depends upon an integration of professional and industrial matters, not their disconnection” (p. 37).

Teacher advocacy for public education and social change is a third major influence on organized teachers’ purposes that is recognized in the present study. McBeath (1967) contends that a *‘client-centered’ orientation* is found in teaching in combination with *‘bureaucratic’ (employer-employee) and ‘professional’ orientations*. Van Leeuwen (1998), General Secretary of Education International,¹ notes, “classroom teachers who choose to become members of an education union not only expect the organization to defend their pay and employment conditions, but to also meet their professional needs and to promote education as the single most important public service” (p. 8). Caldwell and Hayward (1998) identify the blurring of union roles in a “curious mix of industrial relations matters, professional issues, political comment, economic affairs and general consciousness-raising on issues . . .” (p. 169). The co-authors believe the use of collective and industrial action has undermined the concept of teaching as a profession. However, the multiple facets of teachers’ interests co-exist and require different kinds of service and prompt different types of union actions. Education, administrative, economic, legal, and social environments shape teacher advocacy. The professionalization of teachers cannot replace the unionization of teachers. Nor can the unionization of teachers assume teacher professionalization.

Bourdoncle (1993) observes that *professionalization* is not a process with a beginning and an end, but a constant contest for control over a given sector of activity. The contest has differing benefits and costs associated with each period of change. McDowell (1981) signals change in the concept of teacher professionalism in the 1980s.

¹ The World Confederation of the Teaching Profession and the International Federation of Teachers’ Unions amalgamated in 1993 to form Education International (EI). EI brings together and represents organized teachers internationally.

McDowell observes a more educated society that seeks to understand the rationale of education decisions. He also observes a shift from largely self-employed to mostly employee status that creates a more tightly woven and interdependent social fabric. He judges the myths of managerial and professional infallibility as no longer tenable. McDowell counsels, “if [teachers] are wise they will accept, and even create, devices for ensuring an integration of their educational goals and objectives with the needs and wishes of society” (p. 2).

Hargreaves (1994) suggests professionalization recognizes teaching as complex and skilled, requiring more leadership, partnership, consultation, and shared decision making. Routinization, deskilling, less discretion, and more prescription characterize deprofessionalization. Seddon (1997) believes that professionalism is linked with knowledge and the value attributed to knowledge. Control of educational and professional knowledge is contested in the broad political framework of society. Education reform based on an economic ideology, for example, changes the regulatory framework and dimensions of professional practice. Seddon suggests that contemporary changes in education offer an opportunity to rework professionalism. The opportunity exists to seek preferred change, not just accept probable change. Reprofessionalization exists in tandem with the deprofessionalization process. For the present study, *teacher professionalization is an affirming transformation of the role and status of the teacher. Professionalization results in respect, trust, and appropriate recognition of teachers' knowledge and judgment applied in partnership with others in increasingly interwoven and complex education and social settings.*

Underpinned by principles of democracy, equality, and solidarity, *unionism* recognizes the benefit of collective power and persuasion to protect and advance individual and group interests. Unions are “secondary organizations whose existence and operation are conditioned” (Hyman, 1997, p. 310). Conditioning influences include management ideology, labour markets, and the general economic climate (Hyman, 1997; Lloyd, 1997; Locke & Kochan, 1995; Wever, 1995). The legal and economic framework for employment and industrial relations and the degree of legitimacy granted unions by the broader society are also significant (Godard, 1997; Howard, 1995; Lloyd, 1997; Locke & Kochan, 1995; Wever, 1995).

Okot (1986) suggests that a teacher organization may or may not declare itself to be a trade union, dependent upon its self-perception and the public image it seeks. Bascia (1994) notes that “teacher unions can strengthen teachers’ professional communities” (p. 10) and “provide a vehicle for teachers’ representative participation in educational decision making” (p. 69). Goble (1990) considers any distinction between union and professional organization valid only as it describes kinds and objectives of activities being pursued at a specific time. Union or professional organization is ultimately a question of recognition of teacher collective action. “Group status . . . is largely secured as a result of that group establishing itself on some kind of institutional basis, asserting itself as the voice of its members and being accepted by others on those terms” (Senate Employment, Education and Training References Committee (Senate), 1998, p. 28). For the present study the terms: *teacher organization*, *education union*, *teacher union*, and *organized teachers* are used interchangeably. Each term refers to *the organization of teachers for collective representation and action*.

Significance of the Present Study

The topic of the present study is socially significant as well as personally engaging. The contributions of the present study are examined below.

Social Significance

Cooper (1992) suggests “comparative analysis and generalizations about school teacher unions can guide policy makers and union leaders, educators and scholars, as they seek to build labor peace, progress, and school improvement” (p. 4). Kerchner, Koppich, and Weeres (1997) believe “institutions matter deeply to society, and teacher union activity over the next decade will affect the future of both the institution of public education and the institution of organized labor” (p. 193). The present comparative study contributes to labour practice and the improvement of public education by examining the management of education reform. The present study raises consciousness about the ideologies that motivate the actions and shape the relations of organized teachers and

states. It is hoped this act of consciousness-raising will benefit public education and the development of ‘democratic communities’ (Hargreaves & Fullan, 1998).

Organized teachers and state relations also have consequences for teaching practice and student learning. Nurturing teachers’ passion for teaching has positive effects on their students; the converse is also true (Hargreaves & Fullan, 1998). “If schools are to teach creativity and problem solving and cooperation and involvement, they must practice them, not just in the classroom but at all levels of the system” (McNeil as cited in Shedd & Bacharach, 1991, p. 194; see also Carnevale, 1995; Johnson, 1990; Lessard & Brassard, 1997). Change in organized teachers relations with states in post-industrial countries internationally was being realized or was anticipated in the reform of education by the mid 1980s (Boucher, 1985; Duclaud-Williams, 1985; Grace, 1987). Teaching and teacher unions are experiencing change due to largely government-initiated reforms (Fredriksson, 1998; Futrell, 1998; Grace, 1987). Teacher unions also initiate change in relations with governments (Jouen, 1998; Ota, 1985).

Teacher organizations provide a vehicle for building member and public awareness, and for initiating supportive action on behalf of public education. Bascia (1998b) urges teacher organizations to articulate the connections between teacher working conditions and student learning opportunities, and between changes in education policy and teaching practice. Teachers and their practice affect the prospect for education reform. Connell (1995) finds

the teaching workforce . . . is not fixed in its political character by the structures that produced it as an economic category. Its capacities for action can be developed by social mobilization and the development of a political consciousness about the labor in which it is engaged. (p. 107)

Connell suggests the possibilities for the exercise of real influence in teaching practice depends largely on

teachers’ capacities for reflection and strategic thinking about their work. . . . [A]ttempts to de-skill teachers or to impose new systems of surveillance over their work, and the struggle of teachers’ organizations against such control, have more than local industrial significance. Such questions bear on the larger possibilities of education in a world where democratic outcomes are very much in doubt. (p. 111)

Other writers share concerns about the future of democracy. Labaree (1997) observes tensions that exist between public and private rights, and between democratic politics and capitalist markets. Labaree believes individualism holds sway in the United States. Saul (1997) suggests the Canadian experience of individualism as “a balance between opportunity and result” (p. 224) is in danger in the present corporatist and interest-based reality. Saul sees the privatization of education as undermining democracy by weakening public education. Hargreaves and Fullan (1998) draw on numerous authors to demonstrate the various authors share the belief that “public education has an important role to play in developing and maintaining democratic societies” (p. 13).

Teacher organizations also play a role in developing and maintaining democratic societies. In a comparative study in the economic sector, Fukuyama (1995) observes that

in any meaningful democracy, the interests and wishes of different members of society have to be articulated and represented through political parties and other kinds of organized political groups. And a stable party structure can come about only if people with common interests are able to work with one another for common ends—an ability that rests, in the end, on social capital. [A society] must be capable of self-government at levels of social organization below the state. Such a system depends not just on law but on the self-restraint of individuals. (p. 356-357)

Social capital is a capability that arises from the prevalence of trust in a society or in certain parts of it . . . Social capital differs from other forms of human capital insofar as it is usually created and transmitted through cultural mechanisms like religion, tradition, or historical habit. (p. 26)

Teacher organizations, in addition to addressing teacher professional interests and working conditions, are advocates for equity and democracy. In the transformation of education founded on economic principles at the expense of democratic principles, teachers and teacher unions are a potential source of opposition (Hargreaves, 1994; Robertson, 1996; Ryan, 1994). Many governments internationally impose changes that curtail autonomous professional practice and reduce the quality of teacher worklives (Brown et al., 1996; Grace, 1987; Robertson, 1996; Ryan, 1994; Swanson, 1995). Many governments mandate curriculum, standardize student evaluation, institute systems for teacher appraisal, and impose professional development. Reform strategies decentralize management and diffuse power for decision making in ways that circumvent historic forums where teacher unions influence education policy. These direct and indirect

constraints on teacher autonomy channel the energies of teachers and command the attention of teacher unions. Through restructuring the education system, the training of teachers, and the mandate of teacher unions, governments significantly diminish the power of a traditional interest group (Brassard, Chené, & Lessard, 1997; Buchanan, 1996; Grace, 1987; Okot, 1986; Robertson, 1996; Ryan, 1994; Vivone, 1994).

Teachers' ability to influence the increasingly complex teaching environment is of growing importance: Teachers perceive increasing inequalities in education opportunities for students and individually feel the debilitating impact of accumulating stresses. Teachers seek a voice in decisions regarding education policy. Teachers want to share their experience and knowledge about the challenges facing education, establish active partnerships to determine and support the implementation of reforms, and improve teacher working conditions (Fredriksson, 1998). *Teacher unions serve as the collective voice for teachers where "organized teacher participation involves the expression of views through a democratic process"* (Fredriksson, 1998, p. 24).

The present comparative study explains relations between organized teachers and states in three cases with reference to education reform. Wever (1995) notes that "institutions constrain the extent to which the actors can change the nature of work and employment relations, but institutions can be . . . changed as well" (p. 63); institutions are shaped by the way people think and talk about employment relations and the nature of work. Similarly, Paton (1962) held the belief that people can, "by taking thought and pains, gradually perfect their institutions" (p. 85). Fukuyama (1995) observes "a resolute and competent state can shape industrial structure and overcome long-standing cultural propensities" (p. 128). Understanding the interaction of state and organized teachers relations with the process and the nature of education reform can assist states and teacher organizations to appreciate the importance of their respective roles in education reform. The parties can assess and cultivate their relations to the benefit of labour harmony, public education, and the formation of just and humane democratic communities.

Personal Significance

The research process and the topic are of personal significance. How did I come to study in a francophone university in Québec? What did studying in French and in

Québec mean for my research? How did the research topic take shape? These questions are explored below.

In my search for an appropriate program and advisor to pursue my interest in teacher organizations, I learned of a professor researching teacher professionalization in Québec. Studying at the Université de Montréal would require managing language differences: Following one year of immersion and intense study in 1986-1987, I had a functional level of oral French. By prior arrangement my written assignments and thesis were completed in English. The second language learning environment opened doors to academic discourse in two communities and added new dimensions to the opportunities for personal growth. I found the use of visuals, such as tables and diagrams, to be effective means to transfer meaning between the two languages. The opportunity to explore the role of education in the political history and future of Québec in relationship to Canada was added value.

Studying in a province with a strong union culture also required building an understanding of *teacher unionism*. The teachers in Québec belong to a registered trade union, la Centrale de l'enseignement du Québec (CEQ). In contrast, the Saskatchewan Teachers' Federation, the teacher organization for which I work at the time of this writing, is a legislated professional organization that encompasses both union activities and professional services. Teachers and others refer to the organization as "the Federation" or "the STF", rarely "the Union".

The present study is rooted in my Master of Education project, "The Saskatchewan Teachers' Federation: Issues then and now" (Humphries, 1997). The project suggests that collaborative external relationships and social policy that guide the pursuit of long term goals distinguish the Federation's agenda and practice among teacher organizations. I arrived in Montréal intent on further study of the STF. The singular focus broadened due to the experience of teacher unionism in Québec, the exposure to comparative education, and the opportunity for an extended leave.

I chose Victoria, Australia as a third case. In part, the choice was due to the literature portrayal of rapid education reform in Victoria in the mid 1990s. In part, the choice offered the opportunity to visit family members who reside in Australia.

Objectives

The present study accounts for differences in relations between organized teachers and states with respect to the nature and process of education reform in three cases situated in two post-industrial western democratic countries, Australia and Canada. Interviewees were selected based on their experience in leadership roles in education organizations and on their accessibility. The specific objectives for the present study follow:

1. *To identify and characterize diverse relations between organized teachers and states.*
2. *To account for differences in relations between organized teachers and states.*
3. *To demonstrate the interaction of diverse types of relations between organized teachers and states with education reforms and reform processes.*

Education reforms directly and indirectly influence teacher professionalization and have implications for education unions. Changes in teacher interests and the mandate and orientation of teacher unions in turn influence relations with the state. Discussion of implications for teacher professionalization and teacher unionism is secondary to the development of a typology of relations between organized teachers and the state, and hence is limited.

Methodology

The present comparative study draws on *case study, historical, and Holmes' problem-solving approaches* to research. Three cases were selected based on the nature of the perceived relations between the state and the teacher organization with respect to education reform. The cases exemplify and enable the explanation of three different types of organized teachers and state relations. The procedure is a comprehensive description and explanation of three types of organized teachers-state relations based on an analysis of interviews and relevant socio-historic documents. A theoretical framework in the form of a preliminary typology of relations shapes the analysis.

Ethical Concerns

The people invited to be interviewed were teachers who are members or leaders (current or previous) in the teacher organization, and public figures who are previous ministers of education or senior state bureaucrats (current or previous), or who hold a prominent role in another education organization. Invited individuals could choose to participate or choose to not participate. Those people who participated were provided with the opportunity to review an analysis by theme of their contribution to assure its accuracy. Data gathered through the interview process was maintained in a private home for the duration of the study. Only I, the researcher, have access to the link between each participant name and a code. Material may be retained in a mutually agreed archive with the permission of the participant or destroyed.

Delimitations and Limitations

The focus of the present study is confined to the relations between organized teachers and states. The critical and fundamental relationship between the teacher organization and its membership is not studied. Although not part of the present study, the important relationships of teachers and their organization and governments with parents, employing boards of education and related administrative officials is acknowledged. The perspective of those who have an interest in education but who do not work directly with or within the education system was not tapped.

The present study is limited to explaining relations between organized teachers and states with respect to education reform. Reforms considered are restricted to the determination of educational knowledge (curriculum), governance structures, and accountability practices. The reform of education has implications for teacher professionalization and for the mandate of education unions in post-industrial western countries. Only *three potential types of relations* are examined: *partner, labour, and class relations*. Examples of any one of the three types of relations chosen for study are likely to be found only in countries with a democratically elected government.

Overview

The present study is intended to provide insight into diverse types of relations between organized teachers and states with respect to education reform in selected education jurisdictions. The procedure involves the explanation of experiences in three cases. The cases are described comprehensively and in context. The description is based on an analysis of selected education leaders' perceptions about organized teachers and state relations with reference to education reforms and based on socio-historic documents.

The preceding pages outlined the purpose and the significance of the present research, the delimitations and limitations, and ethics of the research project. Following is a review of the literature related to unionism and to education reform. The theoretical framework is developed in Chapter 3. The fourth chapter describes the research design. Chapters 5, 6, and 7 describe and explain the cases. Chapter 8 presents a summary of the study, comparisons of the three cases in response to the three research questions, modifications to the preliminary typology, and questions for future research.

CHAPTER TWO

REVIEW OF THE LITERATURE

The review of the literature establishes the context for the present study. Four topics are considered: (a) the impact of change in work organization on industrial unionism, (b) education unionism, (c) international trends in education reform, and (d) education policy-setting processes.

Work Organization and Industrial Unionism

Teaching and teacher unions experience pressures and changes similar to those that pervade industry, business, and labour. The purposes of this section of the literature review are to place education reform in the larger socio-political and historical context of work organization and to learn from the experience of unionism in industry.

The History of Work Organization

The *periods of Industrialism (Taylorism), Fordism, and Post-industrialism* demonstrate changes in the organization of work. *Industrialism*, characterized by work in factories and the shift to company towns, separated family and work life, unlike agricultural families. Entrepreneurial owners sought efficiency in work and turned to scientific management introduced by Taylor at the turn of the twentieth century. *Taylorism* imposes controls by separating the coordination and performance of work. Management precisely defines and strictly controls work, rules, and innovation. The management style deskills labourers, and removes responsibility and the need for trust; the system is highly legalistic both by design and worker reaction to it, causing formalized dispute resolution (Fukuyama, 1995). *Fordism*, named after Henry Ford, was a form of capitalism that introduced the strategy of raising salaries of low-skilled workers to create mass consumers to support mass production of standard products (Bélanger, 1993-1994; Myles, 1990). Ford practiced a form of company paternalism with social

benefits and the cultivation of a community spirit within the plant (Fukuyama, 1995). The work organization of Taylorism and Fordism, based on control and efficiency, failed to maintain and motivate labourers who sought meaningful work.

Post-industrially, several factors are transforming the world economy: international competition for work, the creation of trading blocks, the transfer of economic power from nations to transnational corporations, and knowledge as the commodity for exchange. This economic transition is perceived to be comparable in significance to that between the agricultural and industrial economies and gives rise to the ‘post-industrial’ metaphor (Barlow & Robertson, 1994; McMurdy, 1994; Myles, 1990). Change in work organization promises to eliminate low-skilled work, expand jobs requiring higher skill levels, and introduce more flexible and participatory forms of work organization. Some authors observe the rhetoric regarding the importance of human resources is contradicted by the experience (Amberg, 1994; Barlow & Robertson, 1994; Myles, 1990; Petrella, 1996). Economic inequalities stem from the rapid increase in employment of the underemployed low wage and increasingly female service workers at one end, and skilled technicians and professionals able to effectively use new information technologies at the other end (Kuttner as cited in Myles, 1990; Locke & Kochan, 1995). There is an overall reduction in the numbers employed, thus, work is intensified.

Information technology shifts the process of production from material goods to ‘bits’ of information, emphasizing knowledge over labour (Davis, 1995). Technology and globalization contribute to the volume and rapid distribution of information such that management no longer exclusively controls the flow and content of information. Unlike familiar economic resources, knowledge is a regenerating resource and a social force. Knowledge creates knowledge, is kept when given away, and grows when it is shared (Davis, 1995; Howard, 1995; Wheatley, 1992). Rising levels of education create a consumer force demanding specialized products and customized service, as well as a social force promoting meaningful work, political demands, and social movements (Hage, 1995). In this way information gives order and promotes growth; “it is both the underlying structure and the dynamic process” (Wheatley, 1992, p. 102).

The search for new ways of organizing work to replace Taylorism and Fordism characterizes the post-industrial economy. There are *two complementary sources* of

significant influences on work organization. *Ideology and public policy* create an institutional framework guiding management options in the organization of work. *Management philosophy and strategies* transform work organization in response to the rapid changes in a global market. In parallel in education, Lawn (1996) observes education reform policies “usually reside within an alliance of management and political parties” (p. 100). The roles of government and management in the reorganization of work in industry are presented in the following paragraphs.

The Role of Ideology and Public Policy

Public policy shapes the social context of employment relations (Myles, 1990) and the institutional framework essential to sustain a market economy (Hyman, 1994; Lawn, 1996; Locke, Piore, & Kochan, 1995). *Ideology*, ideas, and existing institutions in turn influence public policy (Ball, 1992; Benson, 1996; Godard, 1997; Meltz & Verma, 1995; Myles, 1990; Wever, 1995). Social values and government ideology expressed as public policy, temper and shape change in the organization of work. A study of agricultural law in Canada sheds light on the public policy reform process. Benson (1996) finds that “regulatory reform requires political energy to overcome the inertia of the status quo of the background regulatory regime” (p. 82) because regulatory reform “redistributes economic and social power” (p. 124). History suggests war, financial crises, judicial decisions, and politics serve in the domestic context as sources of political energy. Benson notes political reasons include *ideology*, partisan survival, and expediency.

Noël (1996) also believes that the values that *distinguish political parties’ visions of democracy and citizenship play a significant role in determining public policy*. Three ideologies traditionally dominate politics in western democracies: the authoritarian conservative far right, the market liberalism right, and the social democratic left. Noël observes that European countries with social democratic traditions responded differently to public debt and globalization than the United States. These European countries saw less poverty and polarization of income. *Social democrats* are prone to be more interventionist and generous in creating a just welfare state and *liberals* promote free markets and are less apt to redistribute wealth. Post-industrially, some authors perceive

neoliberalism as a significant influence on work organization and a detriment to traditional industrial unionism (Colgan & Ledwith, 1996; Godard, 1997; Kelly, 1997).

Locke et al. (1995) state neoliberalism is characterized by flexibility to respond to rapid changes in liberalized global markets; release from rigid definitions of salary, employment, and work found in collective agreements; and control of regulations governing employment relations. Increased skill levels raise productivity and cut the demand for labour. Neoliberal ideology returns the onus to the individual to negotiate benefits, salary, and working conditions. The co-authors note deregulation causes an increasingly chaotic and polarized wage structure (see also Godard, 1997; Kelly, 1997; Locke & Kochan, 1995). Employers' increased control over pay levels and structures contributes to the decline of trade union power. Colgan and Ledwith (1996), Godard (1997), and Kelly (1997) perceive restructuring of the legal and economic frameworks of work organization creates a 'hostile' environment for industrial relations. Kelly (1997) observes that a reduced union presence and the loss of a forum to air views, results in a representation gap. Limited job opportunities, polarized wages, and loss of voice leads to worker alienation and, Kelly observes, potentially jeopardizes social cohesion.

Benson (1996) observes that with political energy for reform comes the need for ideas. Benson identifies past experience and other jurisdictions as sources of ideas for regulatory change that are adapted to local circumstance. She notes that, once in place, a regulatory mode is "deployed pragmatically, in whole or in part, alone or in combination with other forms of regulation, to solve new problems as they arise" (p. 83). Benson observes the preferred regulatory mode is distinctive to a jurisdiction. Gaps between design and practice develop over time.

Management Strategies

Hargreaves (1994) describes the search for flexibility in the organization of work as a double-edged phenomenon. Management strategies hold the potential to enrich or exploit workers and lead to diversity or divisiveness. Solutions can enhance or impoverish the human condition economically, politically, organizationally, and personally. *Two post-industrial managerial philosophies* shape work organization: *domination and stabilization* (Table I). These strategies reflect the ideologies of

neoliberalism and social democracy. Increased management authority and downsizing to reduce commitments to employees characterize domination. An investment in and empowerment of human resources achieved through employee involvement characterizes stabilization. Managers use the two strategies in combination.

Locke and Kochan (1995) identify *managerial dominance* as a cost-based strategy that offers firms a short term competitive advantage and perpetuates adversarial workplace relations. Myles (1990) notes that the ability to lower wages, lay off employees, and contract out jobs is accompanied by a slower introduction of new technologies and intermittent rather than continuous innovation. This ‘static flexibility’ (Cohen & Zysman as cited in Myles, 1990) is obtained through the deregulation of rigid definitions of employment relations and work, and through elimination of institutions that buffer workers from market forces (Howard, 1995; Myles, 1990). Domination places the onus for success on individual achievement and contributes to the decline of collective action and unions.

In contrast, *stabilization* reduces employee insecurity and aims to develop a skilled work force committed to continuous improvement through both adaptation and innovation. The stabilization strategy recognizes that “if persons are to respond to inability and uncertainty, they must, on some basis, feel secure; a sense of personal security is essential to our ability to come to grips with change” (Schön, 1971, p. 2). Stabilization fosters a ‘dynamic flexibility’ (Cohen & Zysman as cited in Myles, 1990) where management invests in enhancing the knowledge and motivation of employees through supporting life-long learning, high employee involvement in decision making, and cooperative, interdependent work teams (Locke & Kochan, 1995; Myles, 1990; Rankin, 1990; Wever, 1995). Investment in human resources is a value-added strategy that directly involves people for the mutual benefit of employers and employees over the long term (Locke & Kochan, 1995; Rankin, 1990). Value-added strategies are most likely

Table I: Management In Search of Flexibility

Philosophy	Domination		Stabilization	
Descriptor				
Context	Competition, globalization, information technology, knowledge as a resource, rapidity of change, deregulation, decentralization			
Features	Management authority		Investment in human resources	
	Static flexibility: Innovation introduced		Dynamic flexibility: Adaptation and innovation continuous	
	Cost basis: Short-term competitive advantage		Value-added basis: Long-term gains	
Ideology	Neoliberal		Social Democratic	
Application	Downsizing	Entrepreneurism (employee autonomy)	Empowerment (employee involvement)	Partnerships
Employment relations	Antagonistic	'Family'	Collaborative	Partners
Unions	Decline	No role for unions	Decline or transformed	Transformed

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to lead to the transformation of employment relations (Locke & Kochan, 1995). Workers in communally oriented workplaces *entrusted* with responsibility to make decisions about their job are better satisfied, more productive, and make better use of informal communication to resolve problems (Fukuyama, 1995).

Stabilization calls for high wages for skilled permanent employees. Domination downsizes and calls for competitive wages for a core of permanent plus supplementary temporary and contracted workers. Both strategies endeavour to realign the Fordist practice of high wages for low skills. Domination encounters employee and union resistance and produces short-term benefits. Stabilization requires a longer-term investment in change and a transformation of industrial relations. *Government policy and relationships between management and unions* influence the extent to which each philosophy prevails and the success of the approach chosen (Bélanger, 1993-1994; Kochan & Katz, 1984; Levine, 1997; Locke & Kochan, 1995).

Management domination prevails in neoliberal practices. With few exceptions, observe Amberg (1994) and Barlow and Robertson (1994), reforms to involve employees preserve management powers regarding major decisions that determine work organization. Such situations create ‘benevolent dictatorships’ where, paradoxically, remaining workers experience increased company loyalty along with work intensification. The experience is similar for teachers. “Despite gestures in many school districts toward including teachers in making decisions, traditional patterns of dominance and subordination persist” (Johnson, 1990, p. 139; see also Hargreaves, 1994; Popkewitz, 1987).

The Impact of Work Organization on Unionism

Changes in the organization of work historically have been a signal of change in the employer-employee relationship (Rankin, 1990; Rousseau & Wade-Benzoni, 1995, Wever, 1995). The implications for unions of *two reforms common to change in education, decentralization and employee involvement*, are reported (Table II). The union role as a social movement in the transformation of work organization is explored.

Table II: Implications of Two Managerial Strategies for Unions

Management Strategy	Union	Challenge	Opportunity
Decentralization		Competition with central collective bargaining	Strong central and local organization
		Isolation Undermined solidarity	Strong articulation between local and central The development and articulation of a union vision of work shared by workers; a coherent voice on behalf of employees
		Skills, role, personalities of full-time union officers and of management	Interpersonal skills, conflict resolution, and problem-solving skills; facilitative, open attitude
		The competence of local leaders	Knowledge base: leadership training, information exchange; shared expertise
		Attitudes of local leaders	Develop understanding, collaboration
		Issues common to various unions in corporation	Communication among unions; vision of work shared among unions; shared expertise
		The history of relationships with management, and local variations	Foster respectful, collaborative relations
		Relations with other unions	Strengthen respectful, collaborative relations
Employee involvement		Benevolent dictatorship	Partnerships, genuine workplace democracy
		Declining membership	Attend to diverse interests, attract to recruit
		Reduced reliance on rules, increased diversity in practice	Attending to multiple interests through local response supported by central resources, expertise, knowledge
		Increased diversity in workforce	Tap multiple perspectives; membership mobilization; integration of collective bargaining with direct involvement
	Meritocracy	Moderate and limit inequalities; promote access to work reforms	
	Direct participation	Participate in formulation of management policy for employee participation; maintain independence of the representative structure from the employer; integrate bargaining with involvement; offer a strategic perspective	

Decentralization

Lloyd (1997) determines decentralization strengthens local unions by contributing to union cohesion and effectiveness. Other local factors include: individual personalities, the role of full-time union officers and management, the competence and attitudes of local leaders, issues common to various unions, and the history of relationships with management and with other unions. However, tightly structured decentralized work reforms introduced by management are seen by Amberg (1994) “to compete with collective bargaining and to isolate individual plants and their workers from other plants and make them compete with each other and, hence, to undermine labor solidarity” (p. 279-280). Kjellberg (as cited in Hyman, 1997) concludes “that the most resilient union movements were those that maintained strong organization at both central and local levels, and an effective articulation between the two . . . [and an ability] to respond to challenges at the supranational level” (p. 313). This *tri-level structure* reflects bargaining at decentralized levels in the increasingly centralized multinational corporations. Union affiliation with Education International creates the tri-level structure in education.

Employee Involvement

Rankin (1990) notes employee participation reduces reliance on rules and increases diversity in practices. The resulting variability along with expanding interests of an increasingly diverse workforce challenge unions’ use of standardization for control. Voos (1997) remarks that participatory forms of work organization shape the nature of collective bargaining with consequences for unionism in a *shift from ‘insurance unionism’ to a ‘mobilization of membership’* to achieve special interests. In addition to autonomous work groups, entrepreneurship and partnerships are means of involving employees. Entrepreneurism relies on profit sharing, mobility within the business, and greater individual or team autonomy to motivate employees. Commitment to the unit demands loyalty to the ‘family’ and does not support unionism (Bélanger, 1993-1994).

Management by participation is a key factor negatively affecting the density of union membership (Rankin, 1990) and the representative structures of trade unions (Hyman, 1997). However, Levine (1997) observes “environments that are union-free . . . are the least likely to have successful employee participation programs” (p. 204). Hyman

believes the strength of unions exists in the independence of the representative structure from the employer, the development and articulation of a coherent voice on behalf of employees, and a strategic perspective. Levine insists that unions must both be an advocate for participation and be involved in policy development.

Social Movement

Industrial relations institutions are increasingly characterized by commonalities arising from global information exchange and the interdependence of national economies. Industrial relations also continue to be differentiated by variations attributable to local history, the strength of institutions, and the values and strategies of the personalities involved. Industrialism provoked the creation and growth of unionism. Post-industrialism is witnessing the decline of unionism. Unions' traditional structures and procedures are challenged as decentralization of some management responsibilities alters traditional centralized collective bargaining and undermines worker solidarity. *Individual values, interpersonal skills, and knowledge are critical to the success of work reorganization* (Amberg, 1994; Davis, 1995; Hackman, 1981; Hage, 1995; Landy, Shankster-Cawley, & Kohler Moran, 1995; Lloyd, 1997; Locke & Kochan, 1995; Mohrman & Cohen, 1995; Rankin, 1990; Wever, 1995). The increased involvement of employees in the workplace encroaches on the representative role of unions, fosters employee loyalty to management, and contributes to the decline of industrial unionism (Barlow & Robertson, 1994; Locke & Kochan, 1995; Kelly, 1997; Rankin, 1990). There is a need for unions to develop strategies to influence rather than respond to new forms of organizing work (Table III).

Rankin (1990) recognizes that social orders "are always in some sense negotiated orders" (p. 73). Flanders (as cited in Sigurjonsson, 1989) observes unions "must constantly renew their vigor by keeping the spirit of a movement alive in their ranks, because unions need organization for their power and movement for their vitality" (p. 5). Rankin suggests a union vision of work requires an understanding of the impact of new concepts of work organization on the workers, on collective bargaining, and on contract administration.

Table III: Opportunities for Unions Arising from Context

	Union	Context	Opportunity
Factors			
Technology, knowledge, globalization		Multinational corporations; Increasing interdependence of national economies; volume and speed of information exchange	Vision of work shared by labour movement; collectively respond to supranational issues; information search (mining); information exchange
Public policy		Neoliberalism v. welfare state; deregulation	Political and social influence; political involvement; credible community involvement
Social movement		Relationship of productivity and democracy; negotiated social order	Dialogue with community; develop vision and strategy based on understanding of impact of work organization on workers and on collective bargaining, create language for vision, develop required competencies; nurture political influence, seek legislated changes to support collaboration in employment and industrial relations
		Competitive traditions in communities	Problem-solving, interpersonal skills
		The strength of institutions; the values and strategies of key actors	Attend to distribution of power, interpersonal skills
		Interorganization relations	Build vision shared by labour
		Unorganized labour	Articulate vision of work organization; attract to recruit
Management philosophy		Domination v. stabilization	Political influence to constrain management choices; collaboration to influence management strategies
Innovation		Succeeds in newly established sites, with the introduction of technological changes, in industries with high international competition, with the creation of union-management partnerships, with understanding of unions and workers	Understand innovation and impact on workers; build knowledge and foster understanding of workers; engage in positive collaboration with management

The relationship between the organization of work and unionism is evident in the shift from guilds and craft unionism to industrial unionism. The change occurred in response to the authoritative scientific management of work. As Taylorism gives way to more socially oriented employment practices, changes in work organization hold the potential to transform unionism in the post-industrial environment. Hyman (1997) describes the transformation of work organization and employment relations as a ‘battle of ideas’. He observes that unions’ continued relevance is established by a persuasive vision of labour’s relationship to society. The various ideologies contending for control of the purposes of public education in education reform also exemplify a battle of ideas. Education reform has implications for the future of education unions.

Education Unions

Industrial unions are perceived to mediate unfair employment practices, address safety in the workplace, and promote equity in benefits and salaries, and in society. Professional interests as well as economic needs and social causes motivate teachers. Cole (“Education is”, 1998) observes that “being a professional means exercising judgment and having power over your professional and your working environment and trade unionism is a way of achieving this collectively” (p. 38). However, Jessup (1985) differs and notes the strength of labour is in organizing unions -- not in teaching. “This minimizes the importance of problems specific to teachers and emphasizes the differences in interest between teachers (envisioned as labor) and administrators (management)” (p. 12). Similarly Casey (2000) criticizes social justice unionism for distracting teacher unions from the discourses of professionalism and teaching. Fukuyama (1995) does not distinguish between labour and professionals. He notes cartels, guilds, professional associations, unions, political parties, lobbying organizations, and the like

all serve an important political function by systematizing and articulating interests in a pluralistic democracy. But although they usually serve the economic ends of their members by seeking to redistribute wealth to them,

they seldom [exception Germany] serve the broader economic interests of society as a whole. (p. 158)

There is an ongoing debate about the compatibility of unionism or activism and professionalism. There is also debate regarding the membership of school principals in the teacher bargaining unit. In the climate of education reform, there are calls for the reform of teacher unions.

Membership

In a study of three teacher unions in the United States, Jessup (1985) finds the need to attract and sustain membership numbers created the necessity to build solidarity on economic issues. Barber (1997) observes the free market competition among teacher unions in England “makes it difficult, if not impossible, for union leadership to speculate boldly about the long-term future of the teaching profession without risking membership loss” (p. 214). He concludes “the competitive market, therefore, drives the union leadership in the direction of caution and the lowest common denominator” (p. 215). In contrast, a stable financial base due to legislated membership enabled most Canadian teacher unions to pursue a variety of security, social, and professional interests over time.

The membership of school principals in teacher unions varies in Canada. Lane (1995) and Hodgkinson (1983) note principals’ role and individual value system are significant factors in the operation of schools. Principals also have been found to be key leaders in education reform (Lessard & Brassard, 1997; Tyack, 1990; Weiss, 1995). Jessup (1985) foreshadows accentuated differences in roles in schools when principals are excluded from the teacher bargaining unit. Teachers excluded school principals from the union of teachers in the city of Montreal mid 1940s. Governments removed school principals from the teachers’ bargaining units in British Columbia in 1987 and Ontario in 1997. Ontario secondary school teachers expanded union membership beyond teachers, and Québec francophone teachers expanded union membership beyond the education sector.

Role

Berube (1988) notes the influence of education unions in the United States is in the capacity of *reactive watchdogs* rather than as *proactive initiators of education reform*. Along with the reform of education there are calls for changes in teacher unionism. Among the voices internal to teacher unions, Chase (1997) and Urbanski (1998) describe a new unionism based on issues of school quality. Urbanski comments on the Teacher Union Reform Network (TURN) created to redesign unions for effective partnership to improve American public schools. Casey (2000) proposes transforming unions into education change agents to revitalize public education and ensure the health of democracy. Peterson (1997) takes a different approach and promotes prioritization of union advocacy for equity and social justice issues. Rodrigue (2000) recognizes the need for teacher unions to respond to teacher needs, provide an avenue for teacher voice, define standards of professionalism, articulate beliefs about quality education, and extend the union role as social activists. Fredriksson (1998) recommends a visionary and realistic education program that also identifies in what capacity teachers and their unions can and would contribute. The development of such a vision requires an analysis of interests common to unions and employers, and decisions based on research rather than preconceived dogma (see also Casey, 2000).

Non teacher union members also voice opinions. Lawton (2000) favours teacher unions that abandon the political commitment to social democracy, are more responsive to choices by parents and children, and exercise voluntary membership whereby unions attract members with cost-recovery or for-profit services. Kerchner et al. (1997) accept decentralization based on an economic ideology for school reform and promote almost exclusively teacher professionalism as the basis for teacher organization. Kerchner and Koppich (2000) note that organizing unions around education quality to leverage change in teaching requires public policy based on professional principles. The co-authors advise adopting policies that shape teachers' work and school organization. Litzcke (2001) recognizes differences in teacher union and school governance structures and the economic climate between Canada and the United States. Litzcke wonders what the reform of American teacher unions offers Canada. She suggests that teacher union

leadership and conditions to enable the pursuit of visionary ideas are pre-conditions for new teacher unionism. Litzcke encourages stakeholders on all sides to be change agents to increase the quality of education in Canadian schools. Bascia (1998a) observes there is no prescription for the reform of teacher unionism. Bascia (1998b) urges teacher unions to articulate visions of good education practice, to support teacher development, and to demonstrate commitment to quality education. Bascia (1994) suggests teacher unions perform a variety of roles that enhance or extend professional community when the focus is on commonly held issues of relevance to teachers.

Opinions regarding the role of teacher unions are diverse. The opinions reflect the diverse interests that propel education reforms. An integrated approach that balances individual and collective member interests internally, and member with external interests is essential for teacher unions to both remain relevant to their membership and to influence their environment (Humphries, 1997). Bascia (1997) highlights the need for teacher unions to find solutions unique to their circumstance to achieve a balance with society. She remarks on the “significant variety in the contexts of teachers’ work, that teachers’ organizations function differently in different places, and that strategies to improve either must be profoundly local in nature” (p. 442).

In this era of change, Hanley (1998, p. 26), a voice from Education International, calls upon education unions to determine their level of involvement in each of *five roles* in the union relationship with society. First is a *regulatory role* for the profession on issues of certification and decertification, ethics, and competency. Second is a *pedagogical role* regarding education research, curriculum, and professional development. Third is a *socio-political role* regarding human rights, social justice, philosophy of education, and social questions that affect students. *A role in defence of individual and collective rights*, including the rights of children is fourth. Finally, a *bargaining role* addresses issues supporting quality education, such as resources and participation in government education policy-setting processes, in addition to the traditional issues of salary, pensions, benefits, and conditions of work. Hanley proposes that education unions review and clarify their basic guiding principles, identify critical factors that impact on teachers’ responsibilities and rights, and prepare a response. Or

preferably, in Hyman's (1997) language, *offer a vision of the education union's relationship with the state and society*.

Practice

Okot (1986) perceives that organized teachers' practices more so than their espoused or official goals create the social definition of the teacher organization's role. Organized teachers use collective bargaining, recourse to legal procedures, political action, and participation in policy development to gain professional responsibilities, rights, and status (Humphries, 1996a). Many education unions exert considerable political influence on the evolution of education policy by a variety of means including *collaboration, conflict, and political persuasion* (Berube, 1988; Gaziel & Taub, 1992; Humphries, 1997; Ota, 1985).

Internal barriers to the strength of organized teachers' influence are union priorities (Jessup, 1985), multiple teacher unions in one jurisdiction, and rivalry within the organization (Berube, 1988; Duclaud-Williams, 1985; Gaziel & Taub, 1992; Grace, 1987; Ota, 1985; Spaul & Mann, 1985). Jessup (1985) observes external constraints perpetuate teacher unions' prioritization of teacher welfare (see also Bascia, 1994). Jessup identifies external constraints such as ties to labour organizations, small numbers in union leadership roles, and school boards rigorously protective of their authority over school system decision making on issues of education program and policy.

History (Grace, 1987) and teacher values, interests, and motivation (Humphries, 1997; Shedd & Bacharach, 1991) influence organized teachers' strategy. The perceived balance of risk between its dual roles (McDonnell & Pascal, 1988), affiliation with labour, education decision-making processes (Jessup, 1985), and the rapport with the state (Grace, 1987; Tardif, 1995) are also factors determining strategy. Jessup (1985) believes a defensive position justifying the purpose of the union could become a critical factor in the setting of the teacher union's priorities. Hanley (1998) concurs, observing that when there is an imbalance in conditions affecting teachers, the union seeks to redress it, emphasizing different goals in different circumstances. The involvement of teachers in education policy decisions at the school level poses new challenges to teacher

unions and the strength of teachers' collective voice. Ironside, Seifert, and Sinclair (1997), in a study of the reaction of three teacher unions to British neoliberal reforms, perceive that the union with central policy applied locally is best suited to address the new employment relations needs of teachers. The experience is parallel with the experience in industry.

Public policy and management strategies combine, not just intertwine, in the reform of public education. The state has the authority to set public education policy and is ultimately the employer of teachers although management responsibilities may be delegated to local education authorities. Governments in many places also can shape the mandate and membership of teachers' organizations. Explaining relations between organized teachers and states is the focus of the present study. Education reform provides the vehicle to examine the relationship.

Education Reforms

Reforms in public education are contradictory. Reforms seek equity while exposing schools to market forces, promote excellence while limiting possibilities with prescribed curriculum and standardized testing, and strengthen central controls while promising the professionalization of teaching. To achieve desired goals, diverse interests employ different mechanisms to control education and manage professional practice: the market, authority, and trust. Economic interests favour market forces. Bureaucratic interests favour standardization and centralized control. Social democratic interests rely on trust to empower participants. Teachers seek participation with society to set broad goals for education. Teachers also seek to achieve those goals by exercising professional autonomy in classroom practice to meet individual student needs. *Economic, bureaucratic, and social democratic interests are three major influences on education reform* that impact on teacher unions' participation in education policy development.

The Evolution of Public Education

Publicly funded schools endeavour to serve purposes reflecting political, social, and economic aspirations that are at once complementary and conflicting (Labaree, 1997). Public education, the role ascribed to teachers, and the future envisioned for students and society evolve constantly as the dominant aspiration of the collective influences the purposes of education (Labaree, 1997; Lessard & Brassard, 1997). Tyack (1990) questions the trends of centralization, larger school sizes, and the growth in numbers of school principals and nonteaching staff that outpaces growth in the numbers of teachers.

Table IV summarizes the evolution of western education as depicted by Lessard and Brassard (1997) and Tyack (1990). In brief, hierarchical bureaucratic school procedures mimicked the introduction of Taylor's scientific management to industry at the turn of the century. The emphasis on equity increased following the Second World War. Global economies spurred centralization to control quality in education, beginning in the mid 1970s with the oil crisis. In the 1980s and 1990s, privatization and marketization drove the hierarchization and the decentralization of school governance. Governments simultaneously strengthened centralized control of curriculum and standards. At the turn of the millennium, recognition of the role of teachers in the implementation of change suggests emphasis be placed on participatory models.

Public education is perceived as the panacea for concerns about society or the economy (Lessard & Brassard, 1997; Welch, 1991), but the messages are conflicting:

<u>The Talk</u>	<u>The Walk</u>
more literacy	more television at home
better education.....	more un- and under-employed
more diversity	common standards
more complexity	traditional basic skills
global economies	national superiority
(Humphries, 1995, adapted from Hargreaves, 1995)	

Conflicting messages for schooling make finding common ground and decision making difficult for educators and others.

Table IV: Evolution of Western Education

Era	Industrial (Bureaucratic)	Fordist (Bureaucratic)	(Bureaucratic)	Post-industrial (Economic & Bureaucratic)	(Professional, Economic & Bureaucratic)
Factor	1900-1950	1950-1970	1970s-1980s	mid 1980s-	1990s-
Context	Child labour diminishing, Decentralized community control of education	Slow pace of racial integration, Russian Sputnik first in space	Uncertainty: Iran hostages, oil crisis, economic threat of Japan and Germany, international comparisons	Cold War ended, global economy: internationalization of communication and culture	Global competition
Motivation (Ideology)	‘Scientific’ and economic efficiency, “above politics”	Equity Social justice Equal access	Control, Back to basics	Market orientation: global competition, business metaphors	Centralized goals, decentralization of management, family choice, realization reform requires teacher commitment, professionalization ‘Many people’, leaders
Reformers	Administrators aligned with business and universities	Social activists, courts	Top down: National research and reports, Legislators, business		
Process	Reorganization	Desegregation	Retrenchment	Hierarchization	Restructuring
Accountability	Conformity of structure and processes	Response to protest groups, legal compliance, more student choice, financial accounting	Government mandated, student standardized testing	Government mandated, standardized testing, client driven; ranking, rating, comparing	Collegial accountability, client driven, standardized testing
Governance	Organizational development, hierarchical, decentralized control and funding	Fragmented centralization, increased middle management	Uniform state mandate, regulations ballooned, middle management growth industry	Decentralized (another bureaucratic layer) site-based management, schools of choice	Shared policy development, school level financial management, centralized goals & standards
Teacher unions	Established: Focus on job security, wages, and membership		Adversarial with growing attention to professional issues (ex. Teacher training, teacher certification, continuing education, curriculum)		Collaborative: joint development of education policy, teacher education, and curriculum

Key Components of Education Reforms

Swanson (1995) observes that *solutions to address future education needs are similar on the surface* from country to country and among states regardless of the political ideology. Key components of reform include decentralization of administration, school choice, accountability, centralized control of curriculum and student testing, and teaching for meaning. *Solutions rest on changes in governance structures and in the organization and substance of teachers' work.* However, notes Swanson, the *motivation for the reform may differ.* The following two paragraphs consider the motives that drive decentralization and accountability reforms.

Rizvi (1994) identifies *three contrasting perceptions of decentralization* that reveal different educational and political assumptions, and differentiate devolution and decentralization (see also Murphy, 1992). *The social democratic view* espouses collective and mutual development of a shared common culture in the creation of an educated and participatory citizenry. Devolution by social democratic means is a sharing of power that develops community through the practice of direct democracy in a social process. European countries with a social democratic approach see decentralization as an opportunity to change the structurally subordinated position of teachers (Perron, Lessard, & Bélanger, 1993) and to equalize political and professional power (Lundgren as cited in Perron et al., 1993). *The corporate managerialist view* removes the role of community in education decision making and emphasizes efficient and effective performance over cultural concerns. The bureaucratic agenda is to manage rather than empower interest groups. Bureaucratic approaches implement centrally-defined policies by efficient decentralization and delegation within an accountability framework with little room for autonomy. *A market view of devolution* offers greater say to clients in decision making regulated by elements of corporate managerialism. The market orientation promotes choice and “attempts to capture the popular social democratic vocabulary of participation, to serve a set of contradictory political purposes, and to champion the virtues of an education market that protects the interests of the individual ahead of those of the community” (Rizvi, p. 3).

Elmore (1990b) observes the notion of *accountability, a form of control based on assessment and reporting*, has strong appeal but questions the assumption that schools are currently not accountable. Elmore cites multiple sources of obligation to constituents. Schools are accountable to organized community interests, to interventions by individual parents, to government education laws, to education financing systems, and to the use of standardized testing to monitor school performance. In addition to regulation by the state and responsiveness to parents, the profession and recently business and market interests influence schooling. Elmore promotes the development of *coherent and economical individual and school-level education indicators that reflect local goals* and most directly influence student learning. In contrast, Finn and Rebarber (1992) promote a carrot and stick approach to accountability *consisting of 'clear goals and outcomes', a 'trustworthy' monitoring system, and a 'prospect of consequences'* (p. 184). The co-authors anticipate an escalation of debates regarding national measurement of education outcomes that permit interstate and world comparisons.

Economic, bureaucratic, and social democratic interests compete for control of education reform. According to the purpose of the reform, the same reform component such as decentralization, carries different meaning. *Economic models seek individual excellence in a free market. Bureaucratic practices seek excellence through control and standards. Social democratic structures seek equality of benefit, and enable professional and community interests to be voiced in education policy setting.* Student learning and socialization are central to the purpose of public education whether the emphasis is on *equitable opportunities, equitable access, or equitable results.* Key reforms, motivated by economic, bureaucratic, and social democratic interests, follow regarding school governance, assessment and reporting, and the conditions of teachers' work.

Economic Interests

Education reforms internationally are linked to *globalization* and many are driven by an economic ideology. Governments reduce education funding, apply business and market principles to the organization of education, introduce school choice and school-based management and involve the private sector in operating public schools. Hargreaves

(1994, p. 5) notes “ideological compliance and financial self-reliance have therefore become the twin realities of change for many of today’s schools and their teachers.” A market philosophy of education promotes individualism, introduces accountability to clients, creates inequality in programs, favours bureaucratic accountability, adds school principal managerial and entrepreneurial duties, and curtails autonomous professional practice (Brown et al., 1996; Grace, 1987; Robertson, 1996; Ryan, 1994; Swanson, 1995).

Market Oriented Decentralization

Market oriented decentralization of school management is touted as the solution to at once debureaucratize and diversify education (Rizvi, 1994). Popkewitz (1987) and Swanson (1995) perceive a market orientation in reforms in England that promote decentralization and local problem solving, and at the same time, centrally control accountability through curriculum, standardized student tests, and teacher certification. Swanson summarizes the political debate on education reform in Britain as between neoliberal and neoconservative ideologies while teachers who ultimately implement public policy are distanced from the process. Marshall and Peters (1990) note the devolution to the community in New Zealand experienced tension between the dominance of a managerial ideology and the traditional goals of democratic participation and equality. While empowering the community has surface appeal, the authors suggest management language predominated and placed the focus on economics and efficiency rather than education problems. Similarly, Goddard and Punch (1996) demonstrate the simultaneous change to centralize curriculum and decentralize management in Western Australia emphasizes management and outcomes, and disregards curriculum development and the process of teaching. The social goal to alleviate disadvantage is dominated by efficiency, effectiveness, accountability, and entrepreneurship.

Decentralization with a market orientation introduces *competition among schools*. Schools’ financial self-reliance in Britain forced a growth in marketing and income generation activities, managerialism, and human resource management techniques (Ball, 1992; Swanson, 1995). The change benefits schools that are already advantaged and leads to inequities among education opportunities (Barlow & Robertson, 1994; Goddard

& Punch, 1996; Rizvi, 1994; Swanson, 1995; Whitty & Power, 1998). In a review of privatization and marketization policies, Whitty and Power (1998) identify increasing educational and social polarization in England and Wales, New Zealand, and the United States. Disadvantaged children, working class children, and children with special education needs “are likely to be increasingly ‘ghetto-ized’ in poorly resourced schools” (p. 11). Initiatives such as establishing partnerships with business and contracting out school operations, distance school administrators from educational roots. Brown et al. (1996) perceive the education environment changed in Victoria, Australia also due to economic ideology. The co-authors find teacher acceptance of competition in the delivery of education undermines relations between institutions.

Another persistent social theme in market oriented education reform is the *empowerment of parents*. The redefinition of parents as consumers “facilitat[es] unprecedented inroads of market forces into the governance and organization of schools” (Murphy, 1992, p. 7; see also Finn & Rebarber, 1992). *Site-based management and school choice are two forms of decentralization that increase local management.*

Site management. Raywid (1990) suggests school autonomy for curriculum, budget, and personnel characterize site-based management. The distribution of power in the school, and between the school and parents is dependent upon the authority transferred, the constitution and functions of the advisory council, and the method of appointment and retention of the school principal. Raywid suggests there are difficulties in the conceptualization and instillation of shared authority in schools. Raywid identifies a concern regarding increased principal authority without a sharing of that authority with or engaging teachers and parents. Raywid notes budgetary authority is the most likely to be transferred. Site management at the other end of the spectrum is embodied in ‘charter schools’, schools affiliated with and funded by the public system but functioning like private schools and frequently associated with school choice (Lessard & Brassard, 1997).

The shift to site-based management, constrained by funding reductions and centralized control of curriculum and student assessment, imposes responsibility on schools without providing the necessary funding and power to implement change. Ball (1992), Hargreaves (1994), Popkewitz (1987), and Tyack (1990) observe the state

reserves power without responsibility and blames parents for poor choices and schools for bad self-management.

School choice. Labaree (1997) points out marketization and privatization of the education system in parental choice, charter schools, and voucher systems. Raywid (1990) notes that school choice leaves education decisions to professionals, and offers families the opportunity to select a preferred school orientation. Raywid recognizes choice empowers those associated with a school. Choice creates a sense of mission when selecting a school. Choice enables individuals to stay or leave. The right to go elsewhere significantly alters the accountability structure of school governance. Choice forces the evolution of school programs, roles, and relationships within the preferences of clients (Elmore, 1990b; Finn & Rebarber, 1992; Lessard & Brassard, 1997; Raywid, 1990).

In the new market context, “image and impression management are as, or more, important than the educational process” (Ball, 1992; see also Wylie as cited in Whitty & Power, 1998). Carl (1994) reviewed the 1988 *Education Reform Act* in England and the *American 2000 Excellence in Education Act* proposed in 1992. He suggests parental choice reforms in both countries were imposed politically rather than a response to grass roots demand. Carl observes choice represents a strategy for conserving a social hierarchy as “markets too can be authoritarian and coercive” (p. 304; see also Rizvi, 1994). Croninger and Lee (1995) support the view that human choices are ‘culturally bound’ and not reliable for promoting either excellence or equity. Raywid identifies the challenge in offering choice lies in avoiding ethnic and socio-economic segregation in the selection of theme, site, and marketing strategies. She notes the potential for the emergence of a two-tiered system of non-choosers and choosers and related funding arrangements. Raywid poses the problem of protecting the inactive chooser (see also Rizvi, 1994).

Bureaucratic Interests

Ball (1990) suggests that in a bureaucratic system execution is separated from policy development, methods of quality control are introduced, and pay and promotion are linked to performance. The bureaucratic reliance on rules also gives priority to

seniority. The link between pay and performance is equally, if not more attributable, to market forces and the concept of an incentive in exchange for labour. Bureaucratization reconstructs teachers as technicians and school principals as managers, overriding professional collegiality and creating accountability to superordinates. Callahan (1962) believes the introduction of scientific management in the administration of schools led to unsound education practices. According to Elmore (1990b), complex education bureaucracy, diffuse purposes of schooling, and an unfocused curriculum produce low academic achievers, high dropout rates, and unfavourable results on international comparisons. These combined forces contribute to the perceived need for *management strategies* and for reporting the achievements of students, schools, and school systems.

Management Strategies

Regulation of teachers' work takes a variety of forms. Teachers are subject to a "subtle and diffuse network of controls and constraints" (Grace, 1978, p. 218) that include *national curriculum and standardized testing*, teacher education, work organization, and definitions of quality education and professionalism. Direct controls are manifest in processes such as *teacher appraisal*.

Centralization of curriculum and standardization of testing. Elmore (1990b) cautions that links to centralized curriculum should not overly narrow the focus of educators or restrict the benefit sought from increased school autonomy. Goodson (1990) judges that a state-mandated return to traditional subjects promotes a traditional vision of the present and future of the United Kingdom as a class society. Popkewitz (1987) suggests standardized testing has a similar objective to the centralization of curriculum. "Rather than a means to improve quality or standards in teaching and teacher education, standardization serves as a ritual of differentiation and homogeneity. . . . Testing provides ceremonies that define groups and award status" (p. 23). Hazi (1992) observes

classrooms, lessons, students, and teachers are more messy and less generic than an instrument. . . would have us believe. . . It is time for us to admit that subjectivity does exist in evaluation. Our alternative is to live with systems. . . that diminish the role of the evaluator; that reduce, then measure observable--yet trivial--behaviors; and that result in distorted pictures of teaching. (p. 263)

Elmore also identifies “standardized testing [as] an enormous economic enterprise” (p. 7).

A key feature of reform is whether student performance assessments are linked to education goals and state curriculum. Cibulka (1990) suggests that such a link increases the attention school boards, teachers, administrators, and parents give to the indicators. Cibulka identifies two criticisms of performance reporting. Standardized testing “inadvertently hurts the children, schools and districts most in need of help” (p. 185). This linkage “allegedly . . . narrows teaching ‘to the test’, stifles innovation, and weakens local control in favor of state priorities” (p. 185). Elmore (1990a) is not so reticent stating that “assessment systems can have powerful effects on curriculum and instruction” (p. 277). At the heart of student testing are *three questions* (Cibulka, 1990; see also Little, 1993). *Who should have control of performance information, teachers, parents, or state officials? What purpose can standardized assessments serve: the educative needs of individual pupils or national standard setting? How can control and purpose be combined through a meaningful reporting process for parents and the public?*

Hierarchical and judgmental teacher appraisal. Healy (1997) considers teacher appraisal to be a form of managerial and employer control related to accountability and quality control. Walsh (1987) identifies *two basic models of appraisal*. One model is *judgmental and hierarchical* characterized by a management focus on individuals for purposes of control. The second model is *developmental and participative* characterized by a cooperative focus on the collective for purposes of professional growth. Appraisal also can be used to identify the “constraints that operate on the school as a learning community . . . [and] contribute to a reassessment of the purpose of education” (Walsh, 1987, p. 165). The developmental model has elements of control when inservice and professional development opportunities are centrally determined.

“Bureaucratic processes for teacher evaluation were intended to serve simultaneously as the primary vehicle for discussions of individual teaching practice, for professional development guidance, and for personnel decision making” observes Darling-Hammond (1988, p. 532). Bureaucratic decentralization prevails with principals’ responsibility to efficiently manage schools’ business affairs. The bureaucratic model “emphasizes the asymmetrical nature of power in schools” (Healy, 1997, p. 216) as “the

tendency to inspect teachers and teaching increases” (Kerchner & Mitchell, 1988, p. 15). Not much has changed since 1970 when MacDonald considered the strongly hierarchical education governance systems in Canada and the United States. He observes that administrative practices emphasize the custodial and disciplinary aspects of teaching and hinder recognition of teaching as a profession.

Social Democratic Interests

There is growing consciousness that democracy depends on citizen voluntary participation in non-government organizations and institutions. The interaction establishes networks and develops common societal ideas and values increasingly recognized as assets to economic and social development (Fukuyama, 1995; Kouri, 2001). In a comparative study of the role of trust in the economic sector, Fukuyama observes

Sociability is also a vital support for self-governing political institutions and is, in many respects, an end in itself. Social capital . . . would appear to be necessary to permit the proper functioning of rational modern economic and political institutions—a fact that has interesting implications for the nature of the modernization process as a whole. (p. 325)

China, France, southern Italy, and other low-trust [between nonkin] societies all went through a period of strong political centralization . . . By contrast, [in] the societies experiencing a high degree of social trust, such as Japan, Germany, and the United States . . . with political power more dispersed[,] . . . a rich profusion of social organizations could flourish without interference and become the basis for economic cooperation. (p. 337)

Fukuyama notes industrialization destroyed social groupings such as guilds, townships, and extended families. He observes that global capitalism continues the trend undermining local communities and families in the name of highest returns. Fukuyama cautions that social groupings “serve an important political function by systematizing and articulating interests in a pluralistic democracy” (p. 158).

In some European countries, the application of decentralization in education exemplifies employee involvement through social democratic devolution. Social

democratic devolution holds the potential to address professional interests in education reform. After initially blaming teachers and their unions for school failures, their critical role in implementing reform is being recognized. “When the parties interested in reforming education can talk from a shared set of understandings about teaching, the chances of achieving real instructional improvement will increase” (Gallén & Bold, 1989). Themes of empowerment and professionalization in a variety of nuances also are surfacing in Australia and the United States (Brassard et al., 1997; Elmore, 1990b; Kerchner & Cauffman, 1995; Lessard & Brassard, 1997; Murphy, 1992; Poole, 1995; Robertson, 1996; Shedd & Bacharach, 1991; Sykes, 1990; Tyack, 1990). The aforementioned authors promote *collaboration that includes the teaching profession* rather than the traditional model of unilateral control by the profession. Ozga (1985) notes a third model of professionalization, one that is framed for ulterior state purposes. She observes in Britain “the rhetoric of partnership was an extremely significant device in fostering a limited and limiting view of professionalism which concentrated on classroom autonomy and harmony of interests between teachers and their employers” (p. 237).

Sykes (1990) suggests policy initiatives professionalizing teaching arise from two main concerns: the unattractiveness of teaching as an occupation, and the development of teacher expertise and commitment to implement significant change in instruction. “School organization that emphasize[s] bureaucratic regularity, legal norms, or consumer preferences will not adequately cultivate either commitment or expertise among teachers” (p. 84). Murphy (1992) identifies *two strategies to professionalize teaching*, “providing teachers with formal decision-making authority and other avenues of influence, and redesigning their work” (p. 11; see also Tyack, 1990).

Decision-Making Authority

Student education is complex, involving many teachers over many years in a system where goals are ambiguous and shifting, observe Shedd and Bacharach (1991). The central role of teachers in reforming education and the need for their commitment to education goals is increasingly recognized. The co-authors perceive “lack of opportunities to participate in decision making is a factor in many teachers’ decisions to

leave the profession” (p. 131). Participation improves job satisfaction, helps reduce role conflict and stress, raises teacher morale, and promotes trust for school leaders.

Pansegrau (1996) determines that the fundamental issue in the restructuring of public schooling is the redistribution of power, and the realignment of relationships among people. Sockett (1993) shares the view that the hope for education reform lies in the *sharing of power to create autonomous teachers*. Sockett describes two options

to promote improvement in public education -- increasing control over the system and its agents or increasing the autonomy of those agents. Those who value increased control believe in bureaucratic accountability, strengthened curriculum mandates, extensive testing, hierarchical management, and teachers as technicians. Alternatively, those who value autonomy believe in accountability to consumers, curriculum independence within broad goals, testing as sampling, democratic forms of management, and teachers as artists and professionals. (p. 25)

Johnson (1990) points out that teacher participation in school governance begins in the classroom where, in spite of centrally imposed curricula and mandated testing, teachers exercise authority regarding curriculum, instruction, and classroom management. Johnson recommends increased formal teacher authority for bargaining and policy setting, decentralization of school management, support for the redefinition of the teachers’ and school principal’s roles, flexible time, and adequate time and funding as essential elements to change norms and to increase teacher influence in education decision making.

Work Organization

Kennedy (1999) notes that contemporary education reformers advocate altering teacher working conditions and schools’ professional climate, rather than regulating teaching practice. Change in *classroom practice* is best achieved when three factors are met. The unique character of schools, teachers, and the teaching profession is recognized (Bascia, 1997; Johnson, 1990). Teachers are active partners in the process (Cohen, 1990; Fullan & Miles, 1992; Jouen, 1998; Sykes, 1990; Tyack, 1990). Teachers are viewed as change authors as well as change agents (Casey, 2000; Lessard & Brassard, 1997). Proposals for change need to focus on teaching and attend to the interdependence of teachers, egalitarian norms, and the role of the school principal (Johnson, 1990). Johnson

cautions that reforms need also to consider teachers' needs for support, limits to evaluation practices, the politics in local policy development, and the loose relationship between education organizations. Johnson supports a school-centered change process.

Prerequisites for *lasting pedagogical change* are numerous (Elmore, 1990b; Sykes, 1990; Tyack, 1990). Enable teachers to do their job with autonomy. Facilitate teacher access to knowledge and professional development. Invite teachers' professional judgment in shaping policy and in constructing the curriculum. Provide latitude in defining the terms of teacher work by ensuring the freedom to experiment and fail. Increase teachers' collegial accountability. Support lateral connections with colleagues. Create opportunities to observe and evaluate colleagues' teaching. Encourage informal leadership opportunities. Supply adequate resources to support the complex teaching task. Accept failure and slow incremental change. Finally, promote public recognition.

Summary of Education Reform

In summary, changes in public education are contradictory. The contradictions highlight the competing economic, bureaucratic, and social democratic interests in public education. Due to the variety of political interests involved in education, observes Elmore (1990b), it is unlikely that schools will ever fully escape standardization, external regulation, and bureaucratization. Tyack (1990) perceives "school governance will continue to be an uneasy and shifting balance between centralized and decentralized control, but the two modes of decision making are not equally appropriate for all tasks. Equalizing school funding or securing civil rights, for example, has demanded considerable centralization" (p. 187). Elmore (1990c) concludes that the future and success of models based on school autonomy and professional norms "will hinge on the degree to which political, community, and professional interests coalesce around a common agenda" (p. xv). Achieving consensus is no easy feat and depends first upon agreement that consensus is desirable, and second, a commitment to achieve it.

Decentralized market driven forms of schooling are replacing traditional bureaucracy that sought a scientific basis for school administration. The market emphasis on excellence and individualism lives uneasily in democratic societies that must at least

be perceived to attend to issues of equity. Slogans of excellence and effectiveness in schooling “obscure how policies and practices are related to specific groups’ economic requirements for science, technology and bureaucratic mechanism of control” (Popkewitz, 1987, p. ix). The target of excellence is itself constrained by centralized student testing that focuses on controlling rather than facilitating teaching and learning. Be they managerial or market oriented in nature, implementation of reforms lies ultimately in the interaction of teachers and students. Economic, bureaucratic, and social democratic influences on education reform co-exist, serve differing functions, and attract varying degrees of support as values, interests, and perspectives change with each generation. Education policy frames education purposes and administrative choices and offers one vehicle to mediate interests, set priorities, and define relationships.

Education Policy-Setting Processes

In a circular employer/professional-employee relationship, education policy influences education reform, administrative change, teaching, education unions, and participation in education policy development. To alter teacher behaviour, Kennedy (1999) notes policy makers may develop regulations, offer incentives, disseminate research, and sponsor professional development. Kennedy observes that policy is built on a variety of kinds of knowledge: personal, financial, public attitude, and social values.

Teachers have an important contribution to make to policy development. In addition to traditional union vigilance regarding job protection and economic issues, teachers expect their union to “provide a vehicle for teachers’ representative participation in educational decision making” (Bascia, 1994, p. 69). Processes for policy development (Kennedy, 1999; Sykes, 1990) are dependent upon the values framing the problem solving such as consumer choice, control, democratic procedure, expertise, fairness, and uniform treatment. Education policy is established by a variety of means including legislation, bureaucratic prerogative, consensus, collective negotiations, legal mandates, political persuasion, economic expediency, or professional judgment. Each approach provides an avenue favouring the voice of different proponents be they legislators,

bureaucrats, judiciary, parents and the public, school boards, business, or teachers. Ideology influences the purpose for the approach chosen.

Ryan (1994) perceives bureaucratic definitions of teachers' work limit teacher autonomy to methods of teaching and deny teacher voice and hence educators' viewpoints in policy development. Bureaucratic definitions of teachers' work also reinforce a political or managerial authority for goal setting based on economic or control rather than educational or community interests. Casey (2000) cautions policy setters against unintended consequences on teaching. Raywid (1990) identifies *policy issues* arising from decentralization. These include protecting the interests of students, the larger public interests, and the integrity of technical knowledge and professional judgment. Policy must avoid domination by the majority and prepare individuals (consumers, school principals, and teachers) for new roles.

Lewis (1999) draws attention to the interplay between political ideologies and education policy and the role of research and experience in tempering political agendas. Atkin (1994) notes that teacher initiated research is usually undertaken to improve classroom practice and promotes teacher research as a vehicle to change policy (see also Casey, 2000; Fredriksson, 1998). Kennedy (1999) observes that research provides knowledge and serves an enlightenment function but cannot be expected to provide definitive answers for public decision making. To be applied, research must be continuously incorporated in the experiential and working knowledge of policy makers, and interpreted and constantly reevaluated in the light of specific situations.

Finn and Rebarber (1992) welcome "the entrance into [the] policy arena of representatives of education's consumers (that is, students, their parents, and their future employers)" (p. 190; see also Murphy, 1992). The ability of interest groups to garner political support is critical to obtain voice in the policy process because responsibility for public education lies with the state. The debate also highlights "the different ideologies and social interests that enter into schooling . . . [and] compel us to realize that schooling involves a site in which larger issues of social interest and power are contested" (Popkewitz, 1987, p. 21). Elmore (1990b) observes the extent and nature of change will depend upon "how well the tensions are worked out in policy and practice" (p. 25). Employing a mix of approaches to set policy, including research, is more likely to

achieve a balance in addressing needs and avoid the weaknesses inherent in any one approach.

Conclusion

The literature review establishes the context for the present study. Four topics are considered: work organization and unionism, education unions, education reform, and policy-setting processes. Changes in work organization in industry are transforming industrial unionism. Education reforms, directly through legislated changes to the mandate of teacher unions and indirectly through changes in teachers' work, have an impact on education unions. Economic, bureaucratic, and social democratic interests compete for control of education reform, resulting in contradictory educational objectives and controls. Education policy is one forum to mediate the competing interests.

Work organization, education reform, and education policy each demonstrate the influence of ideology in determining change processes and directing change. Management strategies of domination or stabilization to change the organization of work reflect neoliberal or social democratic ideologies. The economic, bureaucratic, and social democratic interests driving education reform and policy processes to formulate and adopt reforms are also linked to political ideologies. One cannot avoid ideology.

The theoretical framework for the present study, Chapter 3, explores the nature of ideology and examines competing ideologies in public education. A preliminary typology of state and organized teachers relations associated with three western political ideologies is also constructed. The typology is presented as a hypothetical construct to be refined through application to three case studies and constitutes the empirical base of this thesis.

CHAPTER THREE

THE THEORETICAL FRAMEWORK

The literature review places the present research in the context of reform of work organization in industry and reform in education. The review highlighted the influence of ideological interests in determining the nature of reform. This chapter presents the theory underpinning the present study. Bogdan and Biklen (1982) note that “theory helps data cohere” (p. 30). This perspective is supported by Merriam (1988) who states that “theory integrates pieces of information into a whole; it makes sense out of data; it summarizes what is known and offers a general explanation of the phenomenon under study” (p. 55).

The present study employs theory to conceptualize and compare the organized teachers-state relations in three cases. The research approach is socio-historical in nature. Three pertinent contributions of sociology to the study of education are: raising consciousness regarding the ideological effect, studying power relations, and exploring the connection between political legitimacy and the legitimation of knowledge in education. The conceptual framework introduces and the construction of a typology develops these three sociological themes. The preliminary typology of three ideal-typical organized teachers and state relations is embedded within the conceptual framework. The construction of the typology takes into account ideological influences by associating the ideal types of relations with the competing interests in education reform. Together the typology and the conceptual framework form the theoretical supports.

Following the graphic presentation of the conceptual framework the nature of ideology and competing ideologies in public education are explored. A sampling of practices internationally demonstrates approaches to education decision making based on domination and participation and provides the springboard for the development of the typology. A review of classification of education unions and presentation of theories of social action and organization design lead to a closer examination of contextual components of the conceptual framework in the description of national circumstances ascribed to the competing ideological interests in education. Common threads in the theories and the national circumstances aligned with the ideological interests suggest

three ideal-typical models of relations between organized teachers and the state. The three models are developed and their relationship presented graphically. Tables and figures are used throughout the chapter to summarize and present the salient points.

The Conceptual Framework

A force in social systems and a factor shaping human behaviour, ideology is a concept central to the present study as depicted in Figure 1. The study of ideology raises questions regarding politics, knowledge and power, and social control in public education. Ideology is pertinent to organized teachers and state relations because the system of ideas guiding school governance and administration has an impact on the participation of teachers in the education policy-setting process, the conditions and substance of teachers' work, and the quality of teachers' worklives. The relations influence and are influenced by reforms and reform processes.

The meeting of the ideologies held by governments and by teacher unions occurs within the socio-cultural context including historical relations, legal structures, and economic constraints, and is influenced by individual personalities. The personal contribution to leadership makes a difference, positive or negative. Individual values, interpersonal skills, and knowledge shape leadership and are critical to the success of relationships. Wever (1995) among others as previously noted, observes individual actors acquire greater significance in the redistribution of authority by decentralization. Lloyd (1997) identifies individual personalities, competence, and attitudes of local leaders as factors affecting local union strength. Lane (1995) and Hodgkinson (1983) note school principals' individual value system is a significant factor in the operation of schools. Poole (1995) observes the influence of teacher union leaders' orientation on membership attitudes.

The interaction of ideologies is expressed in state regulation of education and organized teachers' strategies to influence state decisions regarding education. The relationship influences opportunities for teachers to participate directly in decisions

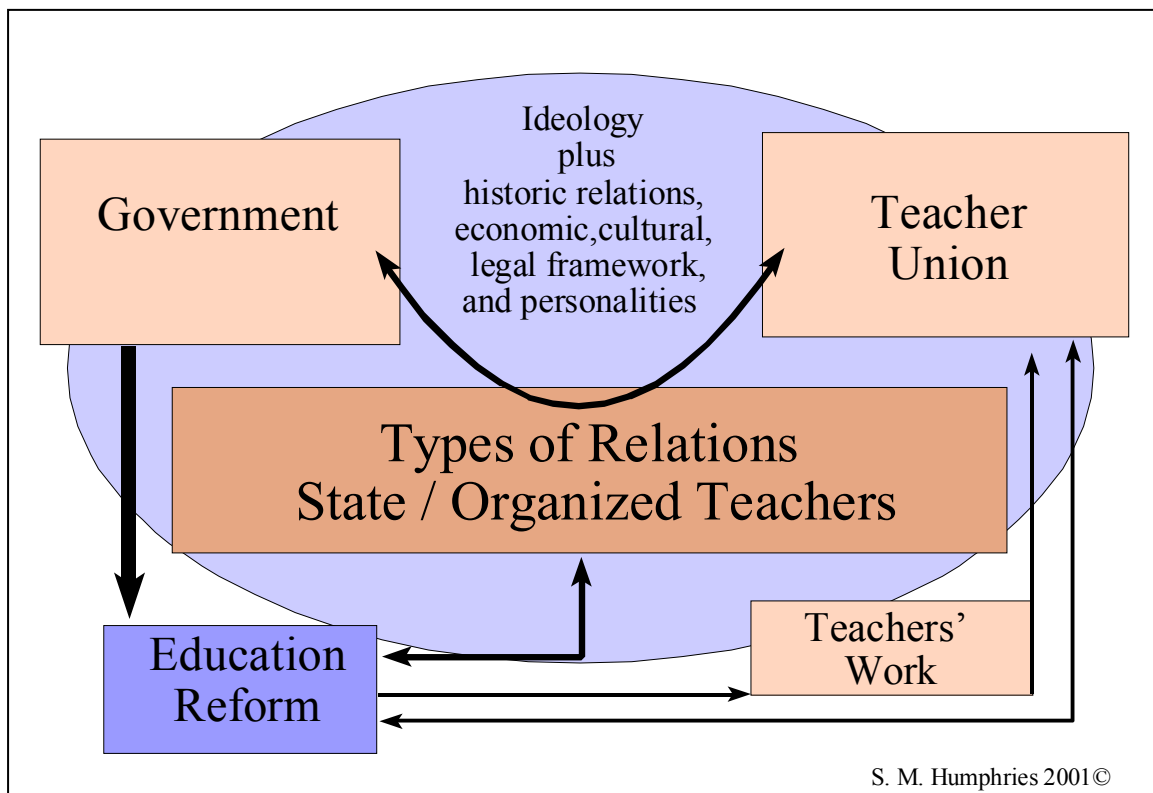


Figure 1: The Conceptual Framework

regarding reforms both in and beyond the classroom. Relations have a bearing on unions' strategies to create a voice for teachers in education reform. The presence or absence of the teachers' voice in making education decisions has a bearing on education reform. First, teacher voice strengthens the opportunity for an emphasis on an educational basis for decisions made (Atkin, 1994; Johnson, 1990; Ryan, 1994). Second, teacher participation in the selection or development of reforms has an impact on the degree of ownership felt by teachers for the implementation of reforms (Cohen, 1990; Fullan & Miles, 1992; Johnson, 1990; Lessard & Brassard, 1997; Sykes, 1990; Tyack, 1990).

The relationship is reciprocal in that education reform has an impact on the quality of teachers' worklives, and an impact on teacher union structures and mandates. These three factors in turn influence teachers' perceived rapport with the state.

Ideology in Public Education

A challenge for any society is to manage the conflict arising from diverse and contending ideologies held by members and member groups of its population. The struggle for control of education reform is such a challenge:

The discourse of the reform proposal is not neutral. . . . [It] exerts control over what knowledge is relevant and the structures by which issues are defined and solutions sought . . . [and] creates a 'mobilization of bias' that excludes certain relations and problems [because] they exist beyond the possibilities of the existing order to things. (Popkewitz, 1987, p. 12)

The Nature of Ideology

Dumont (1974) perceives ideology to be a cohesive force that binds a culture and fosters the solidarity of a social group. The ambiguity inherent in an ideology facilitates the assembly and mobilization of individuals for collective action. Contrary to Dumont's vision of ideology as a constructive force, Rothstein (1991) perceives ideology to distort the world. Dumont and Rothstein view ideology as a collective construct, 'a lived way of thinking' produced by living and working together. The collective construct enables the interpretation of a situation or event such that action is made possible. Rothstein suggests socio-cultural theories can raise our consciousness of these limiting constructs. Theory

too is enveloped in ideology, notes Dumont, even as it endeavours to explain it. Dumont observes one's way of thinking influences one's thought and knowledge. Ideology is rooted in a vicious circle where efforts to resolve uncertainty rely on existing preconceptions. Ideology shapes those preconceptions, hence ideology doubles back on itself. Dumont and Rothstein agree on the need to be conscious of the ideological effect, to account for the presence of ideology, to recognize how it structures our thinking, and is at once false and real.

Dumont (1974) perceives society to be a debate and sociology to be a science of conflict. It is through conflict that ideologies become apparent. Facing criticism and conflict, an ideology must reconcile facts and values, demonstrate its validity, give coherence to a situation, and define an aspiration. Dumont presents ideology as symbolic warfare between the good and the bad, amid which society attempts to define itself. Political ideology illustrates the point. In social debate, neoliberals and social democrats or federalists and separatists give predictable responses shaped by their ideology.

Public Education: Competing Ideologies

The history of publicly funded education is one of tensions between ideologies. Introduced as a requirement to further religion, education became a socializing agent of the industrializing state (Goodson, 1990; Rothstein, 1991). Goodlad (1997) proposes education always has two dimensions: the individual and the context of the individual as citizen. Goodlad acknowledges that the political and social context shapes the education process. Hence, maintaining democracy in the individual and public conscious is a shared responsibility. Nurturing democracy does not rest with the schools alone.

As the dominant ideology of a collective influences the purposes of education, public education, the role ascribed to teachers, and the future envisioned for students and society evolve constantly. Levesque (1981) observes that dependent upon the predominant ideology, school is perceived as an instrument of adaptation to the existing social system based on selection and promotion or as a vehicle for social transformation based on integration. She notes that the goal "equality of opportunity", for example, is adopted by a variety of ideologies for reasons of political correctness, but has multiple conceptions and meanings. Labaree (1997) sees in any liberal democratic society "the

tension between democratic politics (public rights) and capitalist markets (private rights), between majority control and individual liberty, between political equality and social inequality” (p. 41). A political process of goal setting emphasizes differing values and interests over time, and drives change in the purposes of public education. Connell (1995) and Reid (1999) observe that the change is expressed in the official curriculum.

Labaree (1997) identifies three central historical objectives of education as *social mobility, social efficiency, and democratic equality*. These objects reflect citizen, individual, and taxpayer-employer perspectives. Levesque (1981) and Labaree link social efficiency with the aspiration of conservative politics to reproduce the existing social structure. Both link free market liberal ideology and social mobility. Levesque notes meritocracy brings little change to the power relationships in society. Labaree suggests progressive politics reflect a compromise between egalitarian social ideology that promotes equal results and liberal meritocratic ideology that promotes equal opportunities. Along these lines, Marshall and Peters (1990) describe social democracy as a “compromise between labor and capital represented in the notion of the welfare state” (p. 145). In summary, *liberal meritocracy, conservative elitism, and democratic egalitarianism* describe the political ideologies that influence the purposes of public education. The political ideologies are associated respectively, with the previously noted economic, bureaucratic, and social democratic interests in education reform.

As increasing social diversity makes finding common values for the socialization of youth more difficult, the challenge remains to achieve an appropriate balance among the three purposes for schooling. Proponents of market-based education reform reject such a balance and call for radical change focused on creating a competitive, flexible, and skilled workforce to sustain capitalism (Finn & Rebarber, 1992; Labaree, 1997; Robertson, 1996). However, Witty and Power (1998) observe that “even Chubb and Moe (1990) who argue that equality is better ‘protected’ by markets than any political institutions, concede that choice of school in a democracy cannot be unlimited or entirely unregulated” (p. 14).

Changing the purposes of education imposes change on school administration. The ideological influence in school politics is recognized by Bacharach and Mundell (1993) and provides insight into relations between organized teachers and states.

Education Decision Making

Bacharach and Mundell (1993) describe two polarized approaches to education decision making. *Bureaucratic accountability* is accomplished by means of standardization, they suggest, based on the ideological goal of excellence. The excellence perspective measures student achievement and closely supervises teachers to ensure compliance with standards. Both bureaucratic and economic interests employ decision making by authority and control in education reforms. Education reforms motivated by social democratic interests seek meaningful participation by teachers and teacher unions among others in education decision making and strive for equality of results. The equality of results approach suggests that pooling resources, team teaching, and avoiding treating unequals as though they are equal, can develop broader skills. Bacharach and Mundell suggest *professional autonomy* also strives for the ideological goal of equality of results and achieves the goal through participation and skill development.

Bacharach and Mundell (1993) distinguish between *power based in authority*, and *power arising from influence*. The authors note that coexistence of different power bases may give rise to *domination* or *participation*, comparable to the domination and stability strategies noted in industry. Applied to interest groups such as teacher unions, parents, and school staff, the co-authors propose that *coalitions* form to shift the balance of power. Coalitions can, over time, accumulate considerable influence over the authority structure. However, when ideologies and policy perspectives are not compatible, compromise is unlikely. Examples of the power relations, domination and participation, are found in an international sampling of the relations between governments and education unions.

Domination

Relations in Britain changed radically in the 1980s as the Government took direct measures to control organized teachers. Viewed as partners since World War II, the partnership crumbled when the *Education Act 1986* increased central powers while reducing the power and influence of local authorities and teachers. Grace (1987) and

Jones (1985) attribute the change to an accumulation of events rather than a government plan. Teachers are now subject to control through the centralized curriculum, greater specificity in their contracts, and compulsory redeployment (Grace, 1987; Lawn, 1996). Teachers' salary and working conditions are no longer collectively negotiated (Healy, 1997; Lawn, 1996; Walsh, 1987). Grace (1987) observes teacher professionalism is not an effective strategy when confronted with broad socio-political and economic change (see also Lipsig-Mummé, 1999).

In Australia, teachers are subject to greater contractual control and legislated interventions such as competency standards. In the 1990s, the Victorian Government reforms "were marked by the assertion of managerial prerogatives in education and restrictions on the capacities of teacher unions to represent teachers in the protection of their terms and conditions of employment" (Spaull, 1997, p. 301; Brown et al., 1996; Lipsig-Mummé, 1999). In Canada, legislated rollbacks in collective agreements occurred in Alberta, Manitoba, Ontario, Québec, and Nova Scotia affecting staffing, salary, and work days during the early 1990s ("CTF summary", 1996). British Columbia Teachers' Federation experienced a legislated return in 1987 to voluntary from mandatory membership, the removal of school-based administrators from the bargaining unit, and forced union status; in 1993, legislation dissolved local bargaining in favour of provincial bargaining (Humphries, 1996b).

In Canada, statutes recognizing the teaching profession were first adopted in Saskatchewan in 1935. With one exception, notes Smaller (1995/1998), the statutes contained no traditional forms of professional autonomy or control. Teachers gained no meaningful involvement in the training, certification, or teaching practices of members; little access to curriculum and other decisions affecting teaching and learning in schools; and no collective bargaining rights. The legislation did require teacher organizations to discipline the professional misconduct of their members. Smaller concludes the legislation served state interests very well. Smaller notes increased structural control over teachers' work accompanied renewed attention during the 1990s to the ideology of professionalism. In 1988 British Columbia, and in 1996 Ontario, imposed a College of Teachers that removed from the education unions, responsibilities for teacher education, certification, teacher discipline, and professional development. Discussions of a separate

professional body for teachers also occurred in Newfoundland, New Brunswick, Québec, Manitoba, and Alberta.

Participation

Imposed legislated changes affected teachers in four of the five most western Canadian provinces (Humphries, 1996b). In contrast, there were no legislated disruptions in Saskatchewan. The stability is attributed to collaboration in education decision making (Humphries, 1997). In Switzerland, partnership with the authorities is second nature to the education union (Thevoz as cited in Jouen, 1998). Danish teachers participated in a two year partnership with the Ministry and local authorities; Swedish teachers renewed a five year commitment with local authorities to work for pedagogical change (Jouen, 1998). Norway enjoys a history of education reform based on consensus building (Rust, 1989). Teacher unions in France are involved with national politics and participate in education policy setting (Gaziel & Taub, 1992). A centralized education system and a participatory process contribute to teacher involvement in policy setting (Kerchner, 1992; Valentin as cited in Jouen, 1998).

Negotiated Coalition

Organized teachers engage in exchange on a political basis. Education unions create alliances with labour, other unions, interest groups, parents, local communities, and political parties (Jouen, 1998; Lawn, 1985). Unionism in Québec demonstrates class solidarity beginning in the mid 1960s. Following a legislated end to the teachers' strike in 1967 and the centralization of negotiations, public sector unions including teachers created a common front. In Mexico, the association of the education union with the ruling political party facilitates the union's strong influence on school management, education policy, employment conditions, and teacher continuing education. At the same time, the coalition curtails the participation of the rank and file in union governance (Cortina, 1992). In 1982, teachers in Victoria, Australia, perceived "an active role in the electoral process as the only alternative" (Nash & Spaul, 1986, p. 29) to address looming changes in the education system and teacher employment insecurity. Electoral activity, including teacher lobbying and leadership roles in political parties, gains government concessions

“in return for union support for social order and legitimacy” (Pizzorno as cited in Hyman, 1994, p. 129; see also Barbash, 1984). Political coalitions exchange political support with government or third parties for public policy or other return favours.

A coalition is more transient in nature than the commitment found in partnership. The negotiation of a coalition is perceived for the present study to be a strategy to shift power relations rather than a type of relation. The present study is limited to relations of domination and participation in state and organized teachers relations that result from the coexistence of state authority and teacher union influence.

Developing A Typology

Public education is dynamic because, as Lauwerys (1972) observes, education is an instrument of social action not a static structure. Teacher unions experience various relations with states in the reform of education. Relations are reflected in teacher unions' choice of goals and action as nurtured, constrained, or provoked by existing institutions and state ideology and modes of regulation. The experiences internationally exemplify the power relations of domination and participation identified by Bacharach and Mundell (1993). Power relations elicit union responses of opposition and partnership. Relations based on opposition may be differentiated in two ways. First, opposition is for the purpose of making claims on behalf of the individual worker's rights and benefits in an economic model such as the 1990s contest over labour laws in Victoria, Australia. Second, opposition is the quest for broader social change such as the ideological orientation toward the working class emphasized in Québec, Canada in the 1970s. Partnerships further the influence of teachers in policy decisions and generally have a professional orientation such as the focus in Saskatchewan, Canada.

The purpose of this section is to provide a theoretical basis for and to build a typology of organized teachers and state relations. To construct the typology, first, classification is explored and classifications of education unions are reviewed. Second, theories of social action and organization design are presented. Third, the nature and role of ideology are emphasized in constructing ideal-typical national circumstances. Finally,

the interaction of state controls and organized teachers' strategies is analyzed to propose three ideal-typical models of relations.

Classifications of Education Unions

Classification imposes a certain abstraction that is preliminary to the development of any theory (Hamel, 1997). Classification facilitates description and explanation and ranges from a simple series to a systematic typology (Lê Thành Khôi, 1981; Robinsohn, 1992 posthumously), from comparisons based on observation to those consciously framed by specific problems and informed by explicit theory (Schriewer, 1989/1990).

Holmes (1981) notes a typology represents a step toward explanation and theory. Developing types is complex and aims at seeking distinguishing characteristics rather than commonalities, individualizing rather than generalizing. Ideal types have value in investigating diversity and analyzing problems. However, Holmes cautions, ideal types simplify complex patterns at the expense of accuracy and comprehensiveness and hold the danger of leading to stereotypes. Lê Thành Khôi (1981) identifies four rules that guide classification: exhaustivity of interceding elements, exclusivity of an element to a category, pertinence with the research objective and topic, and objectivity leading to the placement of the same elements in the same categories by other analysts. Following is a review of four classifications of education unions published in the 1990s.

In a comparative study, Gaziel and Taub (1992) note teacher unions' success in France and Israel in influencing education reforms since the 1970s. The authors draw on industrial relations literature to identify a continuum of professional unions. At one end are *economic unions* that focus on wages and working conditions and are more likely to withdraw labour to support their demands. At the other end are *political unions* that also endeavour to impart their ideology and interests on the education system and that prefer collectively negotiated resolutions. Variables such as structures, tactics, strategies, and the relationship to party politics distinguish these two types. Those unions that perceive teachers as workers lean toward economic unionism. The view of teachers as professionals who should be involved in education decisions is more akin to political

unionism. Teacher unions in both countries are centralized and highly politicized, actively seek inclusion in the reform process, and experience a division between elementary and secondary teachers. Secondary teachers use industrial action to impose their interests on government. However, the teacher unions are increasingly more open to collaboration. Both the left-wing government in France and the right-wing government in Israel demonstrate willingness to include teacher unions in the policy process.

Kerchner and Cauffman (1995) compare *industrial* and *professional* unionism. They perceive that industrial unionism emphasizes centralization, hierarchical bureaucracy, and the separation of management from teaching and job design from job performance. Professional unionism emphasizes decentralization, team functions, joint teaching, management committees, and collaborative processes. In their view, industrial unionism organizes around dissatisfiers, adversarial relationships, and win-lose bargaining of limited scope. Professional unionism focuses on improvements for education, interdependency of teachers and managers, and interest-based bargaining of a broader scope. The co-authors suggest industrial unionism protects the teacher while professional unionism protects teaching, reflecting a duality of self and public interests. Kerchner et al. (1997) further develop the concept of professional unionism.

Ironside, Seifert, and Sinclair (1997) present a taxonomy of '*open*', '*craft*', and '*business*' unionism based on three teacher unions' reaction to legislated education reforms in Britain. Reforms centralized curriculum, weakened teacher and local authority, and introduced market controls with funding based on pupil numbers. The delegation of budgets to local authorities resulted in pressures on labour costs. Responses to the same reforms varied by union. A commitment to free collective bargaining and a national agreement applied locally characterizes *open unionism*. Open unionism continued to support a universal pay scale, sought to influence education policy at the school level, and was perceived by Ironside et al. to be best suited to address the needs of the new employment relations. Militancy to defend job regulation characterizes *craft* (closed) *unionism*. Professionalism and support for industrial action short of a strike characterize *business unionism*. Both forms of unionism retain a centralized structure and a national focus. Business unionism embraced local management reforms. Ironside et al.

perceive craft and business unionism to have a limited response to local managerial initiatives.

Before presenting the fourth classification that is a typology, discussion of the three classifications is warranted. In the categorizations reviewed, *the polarization of economic and political, industrial and professional, and craft and business unionism captures the ongoing tensions between the dual welfare and professional functions of teacher unions*. The polarization reinforces the portrayal of industrial action as nonprofessional. The use of an industrial relations framework emphasizes the bureaucratic employer-employee relationship. Both Gaziel and Taub (1992) and Kerchner and Cauffman (1995) note *the negotiation of education policy distinguishes professionalism in teacher unionism*.

Kerchner and Cauffman (1995) define unionism based on management strategies of domination and participation and make no mention of the impact of management strategies on the choices available to the unions. Rather, the authors characterize industrial unionism as negative and professional unionism as positive. Of interest in the study conducted by Ironside et al. (1997) is the variation in teacher unions' responses to the same reforms. Lawn (1996) notes unions create identities for effectiveness and to recruit members. Education unions do have strategy choices as Ironside et al. demonstrate. As in industry however, ideology, education policy, and management strategies constrain the choices available.

Cooperative union relations with local management, advocate Kerchner and Cauffman (1995), are a vehicle to develop trust relationships. Local relations are important, and there is also a need to influence education policy at the state level. As Ironside et al. (1997) found, and as noted in industry, unions with centrally determined policy and with influence at multiple levels are more flexible and successful at accommodating a variety of reform initiatives. Kerchner and Cauffman are inattentive to issues of trust in the experience of teachers and their unions. The co-authors overlook the power differentials arising from the feminization and bureaucratization of teaching. They disregard teachers' historical struggles to achieve a collective voice. They neglect the political context internationally that, for the most part, seeks to undermine the influence, rather than to recognize and respect the interests, of teacher unions (Grace, 1987;

Humphries, 1996b; Ironside et al., 1997; Robertson, 1996; Urban, 1991). Gaziel and Taub (1992) recognize a continuum of economic to political unionism. Teacher unionism in Québec introduces socio-political or social unionism.

Tardif (1995) constructs a typology based on political science and industrial relations models. He analyzes the nature and evolution (1960-1992) of the political rapport between the State of Québec and the Centrale de l'enseignement du Québec (CEQ) (see also Clermont-Laliberté, 1975). Tardif perceives *three changes in union organization* based on four variables: union practices, social policy, political affiliation, and rapport with the working class. CEQ social policy moved from consumerist, to social democratic, to socialist, and CEQ practices evolved from collaboration, to direct action, to consciousness-raising. Political affiliation encompasses rejection of, participation in, then fusion with political parties. Rapport with the working class is characterized first as institutional, then industrial, then class-related.

Tardif's (1995) typology best captures the complexity of organized teachers and state relations. Tardif suggests that neither entirely antagonistic nor entirely consensual relations is possible. He describes the CEQ and Québec Government relations as dynamic. The relationship is based on shared interests and subject to change due to multiple social, professional, and economic interests. The typology accounts for social influences, highlights the political nature of the relationship, and recognizes the combination of protective and advocacy functions arising from the employer-employee relationship and CEQ social policy. A teacher union role of upholding professional conduct and promoting professional practice is not apparent in the typology. Like Gaziel and Taub (1992), Tardif accounts for political party affiliation. However, Tardif suggests Québec professional or institutional unionism rejected political involvement, not just political affiliation. Tardif identifies *collective bargaining, political action, and professional involvement* as the main strategies available to organized teachers in Québec. Tardif suggests these strategies correspond with three forms of relations with the state: *economic, political, and ideological* with three forms of teacher unionism: *claiming, socio-political, and professional*.

Theories of Social Action and Organization Design

Holmes' (1981) proposes that comparative research to examine social relations be guided by ideal-typical normative models. Three theories contribute to the development of ideal-typical models and frame the examination of organized teachers and state interaction in the present study. Ben-Ner (1993) proposes a theory of organization design that finds support and alternate terminology in Crozier and Friedberg's (1980) theory of organized action. Touraine (1965) offers a theory of social action that integrates action and situation, interaction and social context, values and social relations.

Touraine (1965) notes the industrial revolution raised consciousness of power relations and created the motive for social change and the impetus for social action. Work, the historical condition of humans, is at once a situation and action, thus providing a means to study social action. Touraine suggests power conflicts, class conflict, and alienation in industrial civilization can be explained through work. *Social action is oriented by values framed as objectives and applied in institutionalized social relations and decision-making fields* such as organized teachers and state relations in the reform of education. State intervention, the diversity of sources of conflict, and the claiming and acquisition of rights all influence social change. Holmes (1981) contends that education goals, or Touraine's objectives for social action, acquire meaning when "seen in relation to normative statements about *individuality, society and knowledge*" (p. 115).

Action is always, in some manner, collective. Action self-references to three principles, according to Touraine (1965). The principles correspond to Holmes' (1981) concepts of society, individuality, and knowledge. The first is a *principle of totality* -- a situation defined by a historical system of action such as a school system. Concepts of society are represented by the state operation and reform of public education systems and attend to the principle of totality in the typology. The second is a *principle of opposition* -- action directed against a source of alienation such as teacher union efforts to influence government policy. Opposition is found in the typology in concepts of individuality. Holmes (1984) assumes individuals create and work through institutions to realize their aims. Hence, individuality is expressed in teacher interests and means of collective influence. The third is a *principle of identity* -- the defence of particular legitimate interests such as teachers' professional knowledge. The typology considers the control of

knowledge in education. The three principles: totality, opposition, and identity are linked, yet, at the same time distinct. Similarly, concepts of society, individuality, and knowledge are intertwined. Touraine cautions that all forms of social action must be considered in rapport with the history of the problem. In the present study, the evolution of public education in three cases is the setting to examine social action.

In the implementation of solutions to resolve social problems, Crozier and Friedberg (1980) observe that actors always have a choice or '*margin of liberty*' within the constraints imposed. This uncertainty fosters interaction between those with authority, that is, the right to decide based on position, and those with influence, that is, those who attempt to sway a decision (Gamson as cited in Bacharach & Mundell, 1993). Ben-Ner (1993) notes those with authority predominantly, but not exclusively, control organization design through the choice of structure and the combination of control mechanisms. Crozier and Friedberg call control mechanisms, '*modes of regulation*'. The latter terminology is adopted for use in the present study. Modes of regulation combined with organization structure, suggests Ben-Ner, determine the strategies available to the participants. Child (as cited in Boxall & Haynes, 1997) defines strategy as "a framework of critical choices about the ends and means of an organization" (p. 569). Boxall and Haynes (1997) find that critical choices explain 'significant variations' in organization performance or perform a 'decisive role' in organization success or failure.

The interests of participants in an organization, Ben-Ner (1993) observes, are both intertwined and divergent. Efforts to maximize the well-being of an organization, and the benefit from the organization, lead to cooperation, while attempts to profit from the margins of liberty drive participants to conflict (Barbash, 1984; Ben-Ner, 1993; Crozier & Friedberg, 1980). *Cooperation, conflict, and control*, remarks Ben-Ner, are characteristic of organizations universally. Cooperation and conflict respectively foster and harm the interests of other participants while control affects their choices.

Controllers may hold any position in the organization. The exercise of control is never complete because participants have access to a limited number of strategies and can only partially constrain the actions of others (Ben-Ner, 1993; Crozier & Friedberg, 1980). Ben-Ner notes the degree of control varies from the ultimate control held by the "*principals*" who determine the main actions of others, to the limited influence of

“*agents*” with attenuated control. In public education, the state is the principal and the teacher union is the agent. External variables that influence the allocation of control include the economic and legal system, the history of participants, the personality of those holding ultimate control, and available technology.

Market, authority, and trust are the main modes of regulation employed in organizations (Bradach & Eccles as cited in Ben-Ner, 1993; see also Etzioni, 1975). Participants perform because of one or a combination of controls such as remuneration, concern about employment security, or belief in honouring a request. Modes of regulation arise from both cooperation and conflict, are interdependent, share some ‘tools’ or choices for strategic action, and are exercised in the design of the organization, thus constraining the tools available to participants: (a) Principals avoid giving agents access to only conflict tools. (b) Principals assign mixed tools when the principals anticipate that cooperative aspects will outweigh the possible negative consequences. (c) Principals may intentionally thwart the formation of coalitions among agents.

Regulation by *market* entails the use of incentives to elicit certain participant behaviours. Wages and benefits are incentives, a market-type motivation that participants typically offer through control by authority. Ben-Ner (1993) states *authority* entails directing participants’ actions. Authority is exercised through administration, monitoring, and the design of positions. Reliance on authority requires detailed determination of agents’ actions and elaborate monitoring mechanisms. Cooperative needs induce the coordination of specialized work and information and other administrative functions. Conflict causes principals to monitor individual contributions through remuneration (market) or discipline (authority). Monitoring may also stem from cooperation as participants invite observation in seeking to maximize the organizational benefit. Designing positions to create teams is an example of cooperative purposes. However, principals also design positions to align agents’ interests, to expand the strategic tools that favour the principals’ own interests, or to limit the conflict tools available to agents.

Trust, Ben-Ner (1993) suggests, may be mutual or unilateral and a moral or a calculated (self-serving) commitment. Trust may induce participants to act in ways inconsistent with their short- or long-term interests and in accord with the controller’s interests. Expensive and time-consuming to establish, trust is a product of long-standing

relationships. Cooperative aims can engender trust or conceal conflict-based purposes to align participants' interests with those of the controllers. Trust can be generated through training or altering preferences by means such as indoctrination and social assimilation. Fukuyama (1995) observes that the general level of trust varies greatly among societies and can change over time within a society. Fukuyama notes perceived betrayal or exploitation in response to trust creates a downward spiral of distrust. Grace (1987) and Ozga (1985) identify constraint by professionalism and partnership in Britain that may exemplify participation characterized by manipulation, rather than mutual trust.

The preliminary typology relies on a '*sociology of organized action*' (Crozier & Friedberg, 1980) with the types of relations differentiated on the basis of state modes of regulation and organized teachers' strategies operating in and influenced by the larger historical and socio-political context. Examining the state modes of regulation in relation to the strategies of organized teachers produces a grid of relationships (Table V). Exclusivity of types (Lê Thành Khôi, 1981) is achieved by considering only the intersection of associated means of regulation and influence: market incentives and exchange, the imposition of authority coupled with influence by opposition, and mutual trust (Table VI). Description of the concepts of *society*, *individuality*, and *knowledge* employed in the construction of a preliminary typology follow and lead to a characterization of the three types of relations.

Table V: Modes of Regulation

Modes of Regulation Participant	Market	Authority	Trust
Principal (State)	Incentive	Unique control (Authority)	Unilateral/Mutual
Agent (Organized teachers)	Exchange	Attenuated control (Influence)	Unilateral/Mutual

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Table VI: Interaction of Modes of Regulation and Forms of Influence

State	Market	Authority	Trust
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Organized Teachers		(Unique Control)	
Market	(Incentives for Exchange)		
Influence (Attenuated Control)		(Impose and Oppose)	
Trust			(Mutual)

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The Public Education System and the State

The nature of *society* is the underlying theme of this section. The section examines the influence of the state structure, public education goals, and form of school administration in determining state modes of regulating public education. Larson (1977) suggests *structure, goals, and technology (systems of regulation)* largely determine the orientation of management and, therefore, the potential of conflict in the relationship between administration and the professional staff.

Structure

Countries moved to actively support and control education systems following the introduction of public education to further religious aims. The state plays a major role in shaping public education. Understanding “how the state relates to civil society is fundamental to interpreting educational structures and processes” (Carnoy, 1992, p. 159). Carnoy perceives that differences in education arise from three types of state: A *peripheral state* independent of society maximizes the free market. A *class state* reflects and reinforces economic power. An *institutionalist state* corrects inequalities that arise from an unregulated free market. Education is perceived to perform appropriately in the peripheral state when education facilitates the operations of the market, in the class state when there is no longer inequity in the market, and in the institutionalist state when it both facilitates the market and corrects its extremes.

Goals

A political process of goal setting drives education reform purposes. Over time, the process emphasizes differing values and interests. The history of publicly funded education in western post-industrial countries, as noted, is one of tension between three predominant political ideologies and related public education purposes: *liberal meritocracy, conservative elitism, and democratic egalitarianism*. These ideologies underpin peripheral, class, and institutionalist theories of state. Public education is perceived respectively as a means *for individual social mobility* (market), a *socializing agent of the state* (authority), or a vehicle for *social transformation* (trust).

Technology

Work organization is pertinent to the present discussion. Ben-Ner's (1993) concept of *organization design: organization structure plus modes of regulation*, frames the discussion regarding the regulation of teachers' work.

Organization structure. A public school system, observes Bidwell (1965), is to some extent a bureaucratic organization in which professional staff are employed by the state. History demonstrates the tremendous influence of industrial management practices on the organization of teachers' work in state bureaucracies (Bascia, 1994; Callahan, 1962; Owens, 1995). Owens (1995) notes "it is becoming increasingly clear that schools are in fact distinct, if not unique, kinds of organizations that . . . require different ways of thinking, styles of leadership and approaches to administrative practice" (p. 19). Schools differ from other bureaucracies in that their general mandate is service, and the core activities are staff-client relations (Hasenfeld, 1974; Johnson, 1990; Larson, 1977). Students and student characteristics are respectively active participants and variables in the teaching-learning process (see also Fenstermacher, 1990). To attend to the variability of student abilities, considerable autonomy is extended to teachers in relatively independent schools constituting a school system. Bidwell observes a structural looseness in school systems reinforces teachers' professional discretion.

Weick (1976) suggests the concept of 'loose coupling' to describe the glue that holds organizations such as school systems together. Elements are responsive to shared variables, yet preserve their identity and physical or logical separateness. The organization is likely to be very sensitive, and yet less likely to need to respond, to every change in its environment. The organization can adapt or isolate breakdowns locally without affecting the entire system. *Structural looseness* (Bidwell, 1965) and *loose couplings* applied to school systems enable and explain teacher autonomy in relationship to school principal authority in the education bureaucracy.

Bacharach and Mundell (1993) suggest that "both the structural-sociological (Bidwell, 1965) and social-psychological (Weick, 1976) perspectives have under emphasized the power and politics that occur within and around school organizations" (p. 423). The co-authors recognize a search for balance among contending values and

interests and note increasing numbers of studies of *schools as political organizations* where “order in organizations is constantly being negotiated” (p. 424). The co-authors observe some schools become individual enterprises in the market reregulation of education, and thus demonstrate that schools are evolving political organizations (see Lawn & MacAnGhaill as cited in Seddon, 1997; Robertson as cited in Seddon, 1997).

Weiss (1995) offers another perspective on source of change in education. The influence of organization arrangements on decision-making processes affects both who holds authority, and how the process unfolds. Shifting authority to new people and different organizations reduces continuity with the past. The move to legislate change, observes Weiss, enables the norms of the legislature to override existing school policy.

Modes of regulation. Conflict arises regarding the *balance of authority and autonomy* when professionals are employed in a bureaucracy (Hasenfeld, 1974; Larson, 1977). This dilemma is heightened by the fact that the professional may face counter pressures from the client, the organization, and the profession (Hasenfeld, 1974). Bidwell (1965) notes that while teachers have the responsibility to attend to the diversity of student abilities during one school year or semester, a school principal’s role is to maintain uniformity of student accomplishment in order to routinize the movement of students from one year or unit to the next. Bidwell observes control of teachers is accomplished by closely supervising teachers and by establishing standards for student accomplishment that constrain the performance of teachers and students (see also Bacharach & Mundell, 1993). Bidwell observes control of teachers is also achieved by nurturing the professional commitment of teachers to desired goals and methods (see also Sockett, 1993).

Control is taking on another form under the influence of an economic ideology. The definition of client is changing. As states introduce market principles in the delivery of public education, parents exercise choice and become school consumers. “School

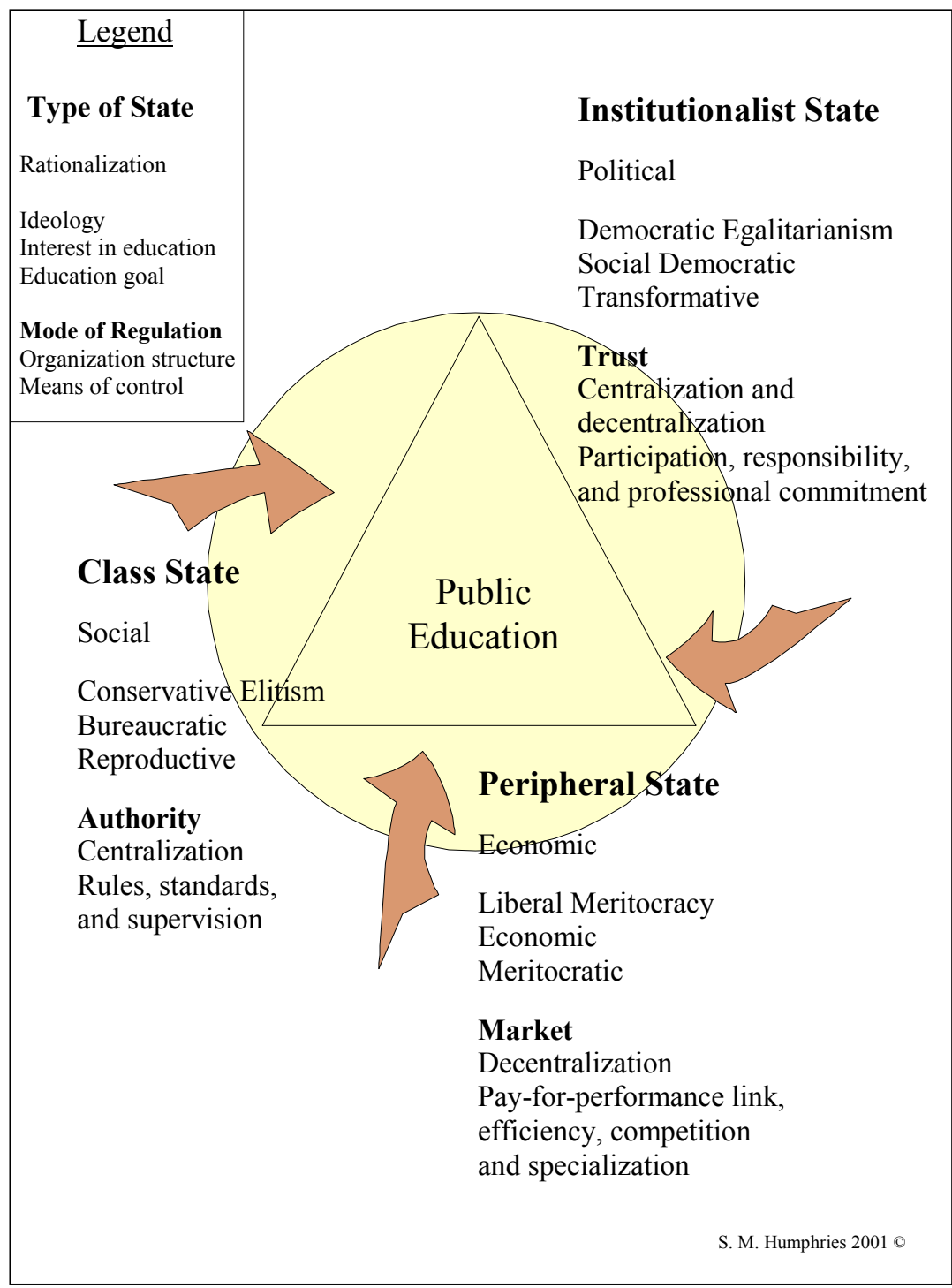


Figure 2: Competing Ideologies and State Forms of Regulating Public Education

success is no longer defined primarily in terms of providing services (processes) but rather in terms of product quality, namely student learning outcomes” (Murphy & Hart as cited in Murphy, 1992, p. 9). Lawn (1985) suggests that efficiency takes precedence over loyalty in this economic model of client as consumer that introduces competition as a means to control teachers.

Efficiency and competition, standards and supervision, and professional commitment are the predominant means of control exercised in public education systems. The controls align with *market, authority, and trust* modes of regulation. The ideology that underlies the state structure and guides public education goals and management orientation determines the emphasis placed on one technology over another (Figure 2).

Education Reform and State Interests

Internationally there are three major interests discernible in the reform of public education: *economic, bureaucratic, and social democratic interests*. These interests are expressed through *decentralization, centralization, and empowerment* through a combination of centralization and decentralization. Decentralization that recognizes parents as clients intensifies market controls leading to localization, privatization, marketization, and individualization. Centralization of education goals, curriculum, and standards of student achievement emphasizes authoritarian controls. Empowerment relies on regulation by trust to build ownership and commitment to reforms on the part of the professionals assigned to implement change among others.

Teachers and Teacher Unions

The underlying theme of this section is the nature of *individuality*: teachers’ interests and collective influence. As noted, Holmes (1984) assumes that individuals create and work through institutions to realize their aims.

Balancing the interests of the individual and the collective within the union’s environment is challenging. Maintaining balance requires teacher unions to continuously remain relevant to the shared values and goals of members, to motivate individuals to achieve union goals, and to effectively influence the environment (Humphries, 1997; see

Hodgkinson, 1983). Lawn (1996) describes teacher unions as *internally dynamic*, able to create and sustain an identity. A parallel with trade unions supports this conceptualization of unionism. Hyman (1994) suggests trade union identity is determined by the interaction of interests, democracy, agenda (interests in action), and power (achieving union objectives, winning a framework, influencing attitudes) (see also Boxall & Haynes, 1997; Peetz, 1996). An examination of teacher interests establishes teacher unions' investment in organized teachers and state relations. Consideration of union actions demonstrates the organizational means to influence state decision-making.

Interests

Teachers, as professionals employed in state bureaucracies, enjoy a unique relationship with students and commitment to society. Teachers' interests are reflected in '*employee*', '*client-centered*', and '*professional*' orientations found together in teaching (McBeath, 1967). These orientations are exercised in three roles: *teacher as worker*, *advocate*, and *professional*. Teacher roles as worker and professional are exercised within the employer-employee relationship (Preston, 1996). Advocacy aims to alter the situation for a student or, more broadly, to shape the social context for teachers' work, for education, and for society.

Advocate. Professions working in public service organizations are structurally and directly linked to their clients and distinguished by the presence or absence of a client-orientation (Larson, 1977, see also Hasenfeld, 1974; Johnson, 1990). Teachers contrast with traditional professionals in the contract they have with their students (Casey, 2000; Fenstermacher, 1990; Kerchner & Cauffman, 1995; McBeath, 1967). *Teaching*, the purpose of which is *student learning*, is based on *human interaction* and requires effort by both the teacher and student (Bidwell, 1965; Fenstermacher, 1990). Teachers build an extensive and intensive relationship with the student for the purpose of transforming both the voluntary and the resistant learners (Cherradi as cited in Gauthier, Desbiens, Malo, Martineau, & Simard, 1997; Fenstermacher, 1990; Gauthier et al., 1997).

Teachers learn from their interaction with students (Kerchner & Cauffman, 1995), individualize instruction (Bacharach & Mundell, 1993), use 'democratic authority' to

generate and nurture ‘disciplined liberty’ (Casey, 2000), encourage decision making as close to the client as possible (McBeath, 1967), and tend to physical, emotional, and moral as well as intellectual nurturing. As Henchey (1996) observes, “learning problems cannot easily be separated from other issues of nutrition, security, a decent standard of living, health, hope, and personal dignity” (p. 6; see also Fenstermacher, 1990). The teacher-learner relationship developed in extended contact over lengthy periods of time is central to teaching.

When generalized, the relationship elicits teachers’ collective involvement in advocating change in the larger political and social context (see Cooper, 1992; Spaul, 1992; Tardif, 1995). Teachers both shape and are shaped by social relations (Casey, 2000). Goble (1990) notes that teachers work collectively based on principles of democracy to develop more just and equal social conditions through access to a quality public education system. Teachers perceive that knowledge, skills, and free access to education hold potential as instruments of economic and social power. Social justice is important to education quality. Poole (2000) suggests social justice is a moral issue that keeps teacher self-interests in perspective.

Worker. The social orientation overlaps with teachers’ employee status in the workers’ search for social justice, dignity, and a share of the political power (Casey, 2000; Goble, 1990). As employees of a state bureaucracy, formal grievance procedures are important to protect the individual teacher’s employment security and right to complain without repercussion. Teacher salaries, benefits, and conditions of work are assigned or must be formally negotiated, individually or collectively, and are exchanged for teacher work. Goble (1990) finds it unsurprising that the founders of teacher organizations were so committed to the dual goals of teacher welfare and professional service; teacher collective action supports the rights and status of teachers.

Professional. Historically, teachers have two professional projects (Hargreaves, 1997): Being *professional* (professionalism), teachers seek to improve quality and standards of practice. Being *a professional* (professionalization), teachers seek to improve teacher status and standing. These professional projects may be complementary or contradictory. Inexorably linked to the client-centered orientation is teachers’ professional orientation to service and quest for professional autonomy. At odds with the

service ideal is the market exchange of teachers' specialized knowledge and skills for economic rewards and a privileged social status (Larson, 1977). Rigid authoritative definitions of standards neglect the dimension of teacher commitment (Hargreaves & Goodson, 1996).

With the advent of school choice, local authorities also use teacher knowledge to attract school clients. The institutional competitiveness perceived in the decentralization of school governance pits teacher against teacher and tends to be divisive (Brown et al., 1996; Hargreaves, 1997).

Influence

Teacher unionization offered an alternative to offset the profession's weak market position and the power inequities individuals faced within a bureaucratic hierarchy. "Because of the teachers' totally subordinate position in the bureaucratized school systems, more solidarity and cohesion were necessary than could be obtained through an as yet uncertain 'science of pedagogy'" (Larson, 1977, p. 14). Like industrial unionism, decentralization and employee empowerment may transform the role of teacher unionism.

Teacher unions need first to be relevant to and harmonize diverse teacher beliefs, reconciling welfare (teacher) with professional (teaching) interests (Kerchner & Cauffman, 1995; McDowell, 1965). Harmonization of teacher interests is generally achieved through a democratic union policy-setting process or by specialization where teachers affiliate with a union based on a particular ideology. Poole (2000) suggests that "teachers' self-interests and educational interests are always present and that the union's emphasis cycles back and forth, depending on contextual conditions that vary across time" (p. 97). Social justice issues are also an integral part of teachers' interests. The British Columbia Teachers' Federation added a commitment to act on the social responsibility of the profession to the traditional teacher union objectivess (Kuehn, 1994). In the United States the National Coalition of Education Activists (1994) calls for unions also to act on a

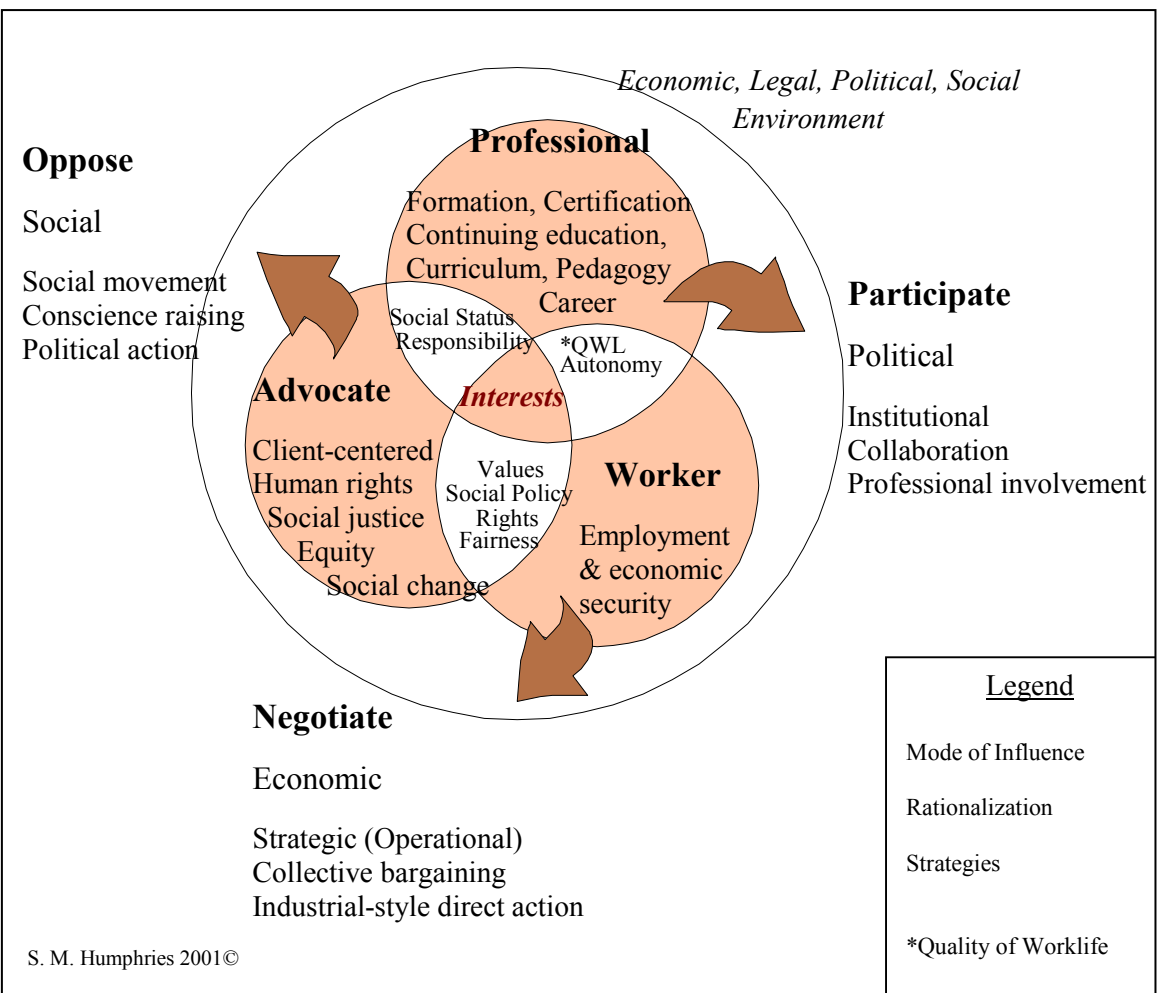


Figure 3: Teachers' Interests and Teacher Unions' Influence

social vision to defend public education to ensure education reforms are driven by principles of equity and social justice.

Second, teacher unions must influence the environment to achieve collective and organization goals that address teacher interests (Figure 3). Boucher (1992), Tardif (1995), and Touraine (1965) all recognize three forms of union action, although their descriptors vary. Boucher notes three aspects of union action that seek harmony but co-exist in a dynamic tension that may lead to discord, particularly in a crisis. Boucher recommends analysis of union activities and changes in strategies on the basis of *strategic (operational)*, *social movement*, and *institutional (interorganizational)* aspects. As noted, Tardif differentiates union practices as *direct action*, *consciousness-raising*, or *collaborative*. Tardif identifies *collective bargaining*, *political action*, and *professional involvement* as the main strategies available to organized teachers. The strategies differentiate *claiming*, *socio-political*, and *professional unionism*. Touraine identifies industrial, social, and political forms of unionism. Each form of unionism incorporates all, but emphasizes different principles for social action. Touraine describes *negotiation*, *opposition*, and *participation in education decisions* as the main strategies available to teacher unions to influence the state. The three authors recognize different actions to achieve the diverse interests of teachers as workers, advocates, and professionals. The strategies require varied degrees of membership motivation and participation for success.

Touraine (1965, p. 365) defines the power of a workers' movement by the workers' consciousness and the rapport that exists between economic, social, and political models of rationalization and political action in a society. The following summary incorporates a variety of classifications of teacher unionism and analyses of union activities (Table VII). If rationalization exists in the dynamics of an economic system (peripheral state), the workers' movement relies upon industrial relations and uses negotiations and strategic (direct) action to achieve its objectives (*craft, industrial or economic unionism*). If a dominant class governs society by employing authority controls (class state), the workers' movement elicited is one of opposition, conscience raising, and agitation for social change (*class, social movement, or social unionism*). If operating in a voluntary rationalization model that exemplifies the work of progressive social forces in

Table VII: Forms of Teacher Unionism

Forms of Teacher Unionism				
Gaziel & Taub, 1992	Political		Economic	
Ironside et al., 1997	Business	Open	Craft	
Kerchner & Cauffman '95	Professional		Industrial	
Clermont-Laliberté, 1975	Professional		Unionist	Socio-political
Tardif, 1995	Professional		Claiming	Socio-political
Touraine, 1965	Political		Industrial	Social
Humphries, 2001	Political		Economic	Social

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society (institutionalist state), the workers' movement is defined by its institutional and political role. Interorganization collaboration and participation within the bureaucratic structures also characterize the workers' movement (*business, institutional, professional, or political unionism*).

The three forms of union activities and strategies suggest three types of unionism. The terminology *economic, social, and political unionism* is used in the present study (Table VII). Political unionism is inclusive of the multiple interests of teachers and offers a rationalization for unionism rather than describing a singular teacher interest such as being professional or a singular action such as interorganization collaboration. Similarly social unionism encompasses both a focus on social issues and the use of social movement as an action to influence change. The phrase, economic unionism, has a broader reach than industrial unionism. The latter phrase is traditionally associated with adversarial unionism in industry. The evolution of unionism in response to employee participation in local sites and enterprise bargaining may give rise to non-adversarial forms of unionism in both industry and in education. The phrase, economic unionism, places the focus on the exchange of work for salaries, benefits, and working conditions.

Education Reform and Organized Teachers' Interests

Like unionism in industry, unionism in the education sector as known before the turn of the millennium is in question. Education reforms, instituted since the mid 1970s, challenge teacher unionism in two ways. At one extreme traditional unionism is confronted by increasingly authoritarian centralization and punitive legislated change to union authority (Cooper, 1992; Grace, 1987; Humphries, 1996b; Lawn, 1996; Lockhart, 1991). At the other extreme, reform strategies that decentralize management promise professionalization and involvement in school policy setting, introduce merit pay, and foster teacher individualism. Decentralization strategies diffuse power for decision making and circumvent historic forums where unions could influence policy. Decentralization also indirectly poses difficulties for organization, unionization, and coordination. Lawn (1996) associates merit pay with a more splintered profession. In 1985, Lawn suggested the likely consequence of direct control in the United Kingdom is a more radical, better-organized union. However, in 1996, he reported obliteration of the union's national role and with decentralization, a search for union effectiveness at the local level. Lawn observed union members become consumers who expect unions to offer new services such as insurance and car loans.

As the participation of individual teachers in the policy process at the school level increases, teachers' collective voice and unions' representative role may be enhanced or eroded, dependent upon the interaction of state controls and organized teachers' strategies. At stake is responsibility for the profession and professional knowledge.

Knowledge

The previous two sections considered state and organized teachers interests and strategies. Knowledge is the theme underlying this section. The study of knowledge enables the exploration of power relations in education and an examination of the connection between political legitimacy and the legitimation of knowledge in education.

Public education is a forum where issues of power and social interests are contested. Issues of policy and management are constantly negotiated in education (Bacharach & Mundell, 1993; Lawn, 1996). Dandurand (1971) suggests that prior to the

1970s, sociological studies of education focused on the socialization and selection functions of schooling. He, however, defines *education as the exercise of power*. Dandurand shows how the notion of power is necessary for a different sociological perspective on education. To do this, Dandurand uses four themes for sociological inquiry: education and social class, political socialization, education and economy, and bureaucratic and organizational aspects of school. Grace (1978) concurs that the “preoccupations of the sociology of education are, among other things, to investigate and make explicit the relationships between various forms of educational experience and various forms of social control” (p. 1; see also Popkewitz, 1987).

At the same time as Dandurand (1971) defined education as an exercise of power, Young (as cited in Welch, 1991) studied the links between patterns of power in society and patterns of knowledge within education institutions. Young provides a catalyst for reconceptualizing knowledge and schooling such that sociological enquiry treats *knowledge as a constructed reality*, rather than a scientific absolute. Post-industrially, knowledge is perceived to be a source of power. Knowledge represents a choice. “[Q]uestions of how any particular selection [of knowledge] came to operate in a given cultural context became a matter of explaining the specific ideological and institutional forces that brought this selection into being” (Welch, 1991, p. 513). The legitimation of knowledge in public education, such as decisions about what knowledge is relevant and valued in education reform, is a source of power.

Knowledge in Education

Knowledge in education is differentiated in the present study by *educational knowledge* or what is taught (the curriculum), and *professional knowledge* or how knowledge is applied in the practice of teaching (the profession).

Connell (1995) and Reid (1999) identify the curriculum as the vehicle to express approved educational knowledge. The curriculum is the means to structure the work of teachers because curriculum largely determines the organization of knowledge: content, scope and sequence, and methods of instruction. The two authors observe that unlike workers who produce agreed upon outcomes, the outcomes of teachers’ practice are contested and shaped in a political process. Reid suggests that control mechanisms focus

on a combination of defining the curriculum, supervising and evaluating teachers, and establishing ways to discipline and reward teachers to enforce compliance with the defined curriculum.

Schulman (1987) identifies four major sources of teaching knowledge: content disciplines, curricula and schooling structures, a breadth of relevant research, and teaching practice itself. *A combination of knowledge and judgment exercised in a reflective or deliberate practice acknowledges the distinctive teacher-learner relationship and distinguishes teaching as a profession* (see Gauthier et al., 1997; Kerchner & Cauffman, 1995; Preston, 1992; Tardif, Lessard, & Lahaye as cited in Bourdoncle, 1993; Schulman, 1987). Bourdoncle (1993) observes that professionalization is a constant contest for control over a given sector of activity with differing benefits and costs associated with each period of change. Education reform in the 1980s and 1990s is one such period of change. The contest is for control of knowledge in education. The topics: curriculum, student evaluation, education policy, teaching practice, regulation of the profession, and education governance, are featured in the following discussion.

The State Interests in Knowledge in Education

States use education as a means of socialization. *Curricula* represent an education system's objectives, the attainment of which is measured in part by *student evaluation*. Social control is linked to the 'hidden curriculum,' to forms of ideological domination in schooling. The language of schooling promises individual liberation. In practice, Popkewitz (1987) notes, schools "reinforce and legitimate social values about authority and control" (p. 4; see also Welch, 1991). Goodson (1990) suggests the introduction of new forms of control over the school curriculum in the United Kingdom exemplify an "attempt at nation-building both in terms of nation-state governance and the partial propagation through curriculum of national ideologies" (p. 231).

Welch (1991) remarks that "ideology is particularly important in that, if universally accepted, it has the capacity to transform a system of control into one of legitimate authority" (p. 520). Respectively, Dumont (1974) and Rothstein (1991) recognize the school as a society within society and as an agency of society with the

purpose of incorporating youth into the social order. Rothstein identifies the relationship between the actors in the system as hierarchical, couched in terms of worker and manager without examining the ideologies of working and dominant classes. Dumont observes that school demonstrates the forgotten presence of ideology or if ideology is conscious, it is never said so overtly. If ideology in schooling is acknowledged in the schooling process, then schooling ceases to serve its socializing function. “The challenge indicates the old legitimating ideology is no longer completely successful” (Welch, 1991, p. 521).

States endeavour to increase their legitimacy by increasing the perceived legitimacy of public education. Weiler (1983) observes that questioning the legitimacy of the state is a recent phenomenon. The phenomenon is associated with acceptability and credibility among citizens attributed to a variety of reasons. The reasons include the class structure of capitalism, inequitable distribution of the social surplus, and tensions between liberalism and democracy. State legitimation is a powerful determinant of the education policy process. Weiler identifies three legitimation strategies: legalization, expertise, and participation. States increase the role of the judiciary to shape education policy. States use experiments and experts to legitimize policy options. Finally, states sponsor ‘selective’ participatory decision making in education to demonstrate state commitment to education reform. Each strategy, according to Weiler (as cited in Welch, 1991), “has the capacity to increase the legitimacy of state-run education, while at the same time largely blunting any genuine prospect of significant reforms” (p. 526). When the state no longer sees education as a means to compensate for its crumbling legitimacy, the state transforms its crisis into an education crisis (see also Apple as cited in Welch, 1991; Lawn, 1996). The state legitimation strategies provide forums for interest groups such as teacher unions to challenge state policies.

Organized Teachers’ Interests in Knowledge in Education

The advancement of teachers’ goal for autonomous professional practice is fundamental to the mandate of teacher organizations. Gauthier et al. (1997) note professional autonomy depends upon the degree of teacher independence in exercising two basic teaching functions: the management of the material and the class. In conflict is the authoritarian control over curriculum and instruction. The feminization and

bureaucratization of teaching places predominantly female schoolteachers subordinate to predominantly male administrators and emphasizes the role of teachers as workers. The hierarchy discounts teacher's professional goals and teachers' goals of control of membership in the profession, self-regulation, and social status (see also Bourdoncle, 1993; Lessard, 1997). Teachers' professional orientation aims to improve *teaching practices* and to gain recognition of *teaching as a profession*.

Teaching practices. Lawn (1996) proposes that *teaching quality is a social construction* that alters over time with changes in national circumstances. Lawn describes a contested process in the United Kingdom that addresses teacher shortages or emerges from the intersection of political and social interests. The contest makes both practical and ideological management imperatives explicit and visible. In the 1920s, local ratepayers judged their teachers, recruited mainly from the working class, by a social order that scrutinized teachers' religion, politics, association, and recreation. Later, close definition of the responsibilities and performance expected of teachers, subject specialization, and tight specification of curriculum content and assessment within schools, characterized teaching quality. In the 1990s, teacher quality is described in terms of *teacher competency rather than teacher responsibility*. Lawn observes the use of terms defining quality legitimate changes in teacher training and work. Lawn notes "tensions between the ideological view of the teacher and the practice, and between the dominant definition of the 'good teacher' and the teacher's definition" (p. 71).

Mechanisms used to appraise teaching performance also shape teaching practices. The three modes of regulation under consideration in the present study correspond to three of Paquay's (1994) conceptions of teaching competencies: *discipline specialist, teacher as technician, and reflective practitioner*.

Although *school choice* (regulation by market) leaves education decisions to professionals, Raywid (1990) notes that teacher specialization and preferences are constrained by the school's need to attract clients. Elmore (1990b) observes that uniformity is suspect in a client choice model, but preferred testing and regulatory mechanisms are unclear. For the purpose of the present study, incentives and competition are perceived to serve to control teachers under market regulation.

Bureaucratic procedures (regulation by authority) elicit in teachers, technical practices that can conflict with professional judgment (Darling-Hammond, 1986). Preston (1992) proposes that practice that can be objectively predetermined is not professional; “the more complex judgements involving high level knowledge and capabilities are involved, the more professional the practice” (p. 8). Kerchner and Mitchell (1988) find “management’s attempts to control productivity by tightening the rule structure are often counter productive: they make schools unpleasant places to work, more rule-bound and less situationally responsive” (p. 201).

Johnson (1990) believes the ideal of *school restructuring that redistributes power* within schools (regulation by trust) holds the potential to facilitate professional practice. Wise (1989) remarks that when

teachers teach professionally, students benefit, for their educational needs become the predominant concern. No longer [would] teachers experience today’s ethical conflict, which results from bureaucratic requirements and standardized tests driving the curriculum and forcing teachers to teach in ways that contradict their professional judgment. (p. 308)

Table VIII summarizes the efforts to control knowledge in education reform and associates regulation by market, authority, and trust with the economic, bureaucratic, and social democratic interests driving reforms.

Teaching as a profession. Self-regulation and participation in school governance are two opportunities for the profession to assume responsibility for professional knowledge. The clients (market regulation), employer (regulation by authority), or professional peers (regulation by trust) are the most common means of regulating professional competence (Belobaba as cited in Schulz, 1990; Reiter as cited in Schulz, 1990). Clients may change or disparage their service provider, or use formal litigation to redress harm suffered. The employer may use supervision and evaluation enforced through sanctions. Professional peers may use informal sanctions such as failure to recommend the offender or formal disciplinary structures. The employer or peers may seek compulsory inservice or recertification programs.

Table VIII: Knowledge in Education

Interest in Education <i>Mode of Regulation</i> Factor	Economic <i>Market</i>	Bureaucratic <i>Authority</i>	Social Democratic <i>Trust</i>
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Control of Material			
Educational Knowledge (Curriculum)	Teacher and client determined	Government prescribed	Joint development
Student evaluation	Options unclear	Standardized	Linked to goals, remedial
Control of the Profession			
Teacher as	Specialist	Technician	Reflective practitioner
Professional Knowledge	Disciplinary knowledge	Technical knowledge, rules	Pedagogical and content knowledge plus judgment
Exchanged for	Clients	Wage	Status
Teacher appraisal	Incentives, market & political	Judgmental and hierarchical	Developmental
Regulation	By client	By employer	By peers

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The informal influence of peers on teaching is great. “Regardless of the name, culture operates as an unseen hand just as do economic or political profits in a market conception of an organization, or rules and authority in a bureaucracy” (Kerchner & Mitchell, 1988, p. 200). Weick and McDaniel (1989) remark that

norms are as a rule highly internalized, so that informal controls and symbolic sanctions are highly effective. Social powers, formalized in the professional code of ethics and the professional association and supported by the social bonds of the professional community and professional elites, carry great weight (p. 343)

Generally the role of teacher unions is limited to ensuring that those who encounter competency problems receive procedural fairness in the handling of their cases. Organized teachers have the capacity to participate more actively in ensuring member competency and enhancing teaching success. Darling-Hammond believes “it is the degree to which teachers assume collective responsibility for instructional quality that determines professionalism” (p. 543).

The balance of control of knowledge in education between the teacher and the state has implications for teacher professionalism and for the future of democracy. Seddon (1997) believes that professionalism is linked with knowledge and the value attributed to knowledge. This link is in the form of power in the broad political framework of society. Reform based on an economic ideology changes the regulatory framework and dimensions of professional practice; “what counts as valued knowledge, and what it is worth in terms of status and reward, become problematic” (p. 235).

Iannoccone and Cistone (1974) note findings about increased national control “raise significant questions not only about the governance of education but about the future of democracy as well” (p. 19). Paton (1962) seeks “responsible participation in the administration of schools which . . . could eventually remove the ever-present threat of bureaucratic government stifling our democratic way of life” (p. 85). He promotes full partnership of the teaching profession in the management of the public schools. Paton notes “Bertrand Russell has pointed out, man’s hope for the future lies in his willingness to renounce coercive power in favor of the power which rests upon persuasion, especially when it is exercised through democratically organized groups and associations” (p. 83).

Table IX: Knowledge of National Circumstances

Interest in Education National Circumstance	Economic	Bureaucratic	Social Democratic
Society			
(Larson, 1977)	<i>Structure, goals, and technology</i> (systems of regulation) largely determine the orientation of management		
<i>Structure</i> (Carnoy, 1992)	Peripheral State	Class State	Institutional State
<i>Goals</i> (Labaree, 1997)	Individual social mobility	Social efficiency socializing agent of the state	Democratic equality, social transformation
<i>Technology</i> (Ben-Ner)	<u>Organization structure</u> plus <u>modes of regulation</u>		
<u>Organization structure</u>	Schools are evolving political organizations (Bacharach & Mundell, 1993)		
	Enterprise (Bacharach & Mundell, 1993)	Structural looseness (Bidwell, 1965), Loose couplings (Weick, 1976), and Political (Bacharach & Mundell, 1993)	
<u>Modes of regulation</u>	Competition, efficiency takes precedence over loyalty (Lawn, 1985)	Hierarchical supervision of teachers, and student standards (Bidwell, 1965)	Nurturing professional commitment (Bidwell, 1965)
(Citations in Schulz, '90) (Ben-Ner, 1993)	By clients Market	By employer Authority	By peers Trust
Individuality			
(Holmes, 1984)	Individuals create and work through institutions to realize their aims.		
(Humphries, 1997)	<u>Unions</u> balance the <u>interests</u> of individuals and the collective, and the union's environment to effectively <u>influence</u> the education and work environments.		
<i>Interests</i> (Humphries, 2001)	Worker	Advocate	Professional
<i>Influence</i> (Touraine, 1965)	Negotiate	Oppose	Participate
<i>Unionism</i> (Humphries, 2001)	Economic	Social	Political
Knowledge			
(Welch, 1991) (Connell, 1995)	Knowledge is a constructed reality and represents a choice. <u>Educational</u> (the <i>curriculum</i>) and <u>professional</u> (the profession) knowledge shape <u>teacher</u> practice.		
Educational (Humphries, 2001)	Teacher constrained by student demand	Government prescribed	Joint govt-teacher development
Professional (Humphries, 2001)	Disciplinary	Standards and rules	Pedagogical and content + judgment
Teacher (Paquay, 1994)	Specialist	Technician	Reflective practitioner
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Kerchner and Mitchell (1988) advise the alignment of

labor relations policies with policies on school finance, curriculum, leadership, and school operations . . . [recognizing that] labor relations policies will assist in shaping whatever form of work is desired if they are fundamentally consonant with the work technology, the social system, and the organization. (p. 227)

The co-authors find “unions can only frustrate rather than advance change” (p. 227) without the alignment of a consistent conceptualization of work with the management practices.

In summary, the concepts of *society, individuality, and knowledge* that contribute to the description of national circumstances (Holmes, 1981, 1984) are aligned with the three competing interests in education identified in the literature review and reported in Table IX. Next, the national circumstances are put together with the theoretical framework to construct a typology of three ideal-typical models of organized teachers and state relations.

A Typology of Relations

A summary of the theories applied demonstrates that although there are a number of ways in which to construe organized teachers and state relations, there are some commonalities (Table X).

The first commonality in these theories is the polarity. Polarity exists between domination and participation, conflict and cooperation, and opposition and participation. The second commonality is the emergence of two forms of opposition to domination. These forms are distinguished by individual or collective goals. Shared goals characterize participation.

A third commonality is the correspondence between the interests in education reform and the theories of organizational and social action, that is, between ideology and action. Economic, bureaucratic, and social democratic interests employ respectively, market, authority, or trust to regulate education. The differing political assumptions result in different conceptions of the same strategy, such as the market, bureaucratic, and social democratic forms of decentralization. In response to the economic, social, and political

Table X: A Summary of the Theory

Education Interests Theory	Economic <i>Individual Goals</i>	Bureaucratic <i>Collective Goals</i>	Social Democratic <i>Shared Goals</i>
Power Relations (Bacharach & Mundell, 1993)		Domination Bureaucratic Accountability	Participation Professional Autonomy
Control Mechanism (Ben-Ner, 1993)	(see also Crozier-Friedberg, 1980: Modes of Regulation)		
Principal:	Market	Authority	Trust
Agent:	Exchange	Influence	Trust
(Ex.) Decentralization (Rizvi, 1994)	Market	Corporate Managerialist	Social Democratic
Action for Change (Touraine, 1965)	Social Action: All action is in some way collective based on principles of: identity (values), opposition (alienation), and totality (situation)		
Political Rationalization:	Economic	Social	Political
Union Action:	Negotiation	Opposition	Integration
Knowledge of National Circumstances (Holmes, 1981, 1984)	Education goals acquire meaning when seen in relation to normative statements about <i>society, individuality, and knowledge.</i>		
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Table XI: Preliminary Types of Relations

	State	Market (Incentives)	Authority (Unique Control)	Trust
Organized Teachers				
Market (Exchange)		Labour Relations		
Influence (Attenuated Control)			Class Relations	
Trust				Partner Relations (Partnership)
Shirley M. Humphries (2001) ©				

rationalization of governance, teacher unions negotiate individual goals, collectively oppose authority, or participate to achieve shared societal goals. The exploration of concepts of society and individuality also produces three theories of state and three forms of unionism that fit the patterns. The commonalities suggest three types of organized teacher and state relations based on *labour, class, and partner relations* (Table XI).

The nature of the interaction between the state and organized teachers determines the reform process and influences the nature of the reforms. In this way, *organized teachers and state relations have a bearing on knowledge in education*. The nature of the proposed types of relations is explored prior to summarizing the anticipated characteristics of the ideal-typical models.

Labour Relations

In the context of an imbalance of power in the employer-employee relationship, teacher interests in the distribution of money and resources, lead to teacher identification as workers in need of protection. Brown et al. (1996) observe that increased teacher workloads and anxiety about the possibility of becoming a displaced teacher have increased teacher individualism and reduced teachers' ability to influence decisions affecting them. Unionism organized for defence and for gains in economic and employment security, observes Touraine (1965), is an element of industrial relations, *an action of contest* rather than one of social transformation. Industrial relations address employer and employee interests in an industry. Boxall and Haynes (1997) and Touraine (1965) identify an industrial form of unionism in environments working to a tight interpretation of contract conditions.

The western-style structure of collective bargaining and exclusive representation (to attain a fair wage for services and to resolve conflicting interests) is not practiced internationally by all teacher unions (Kerchner, 1992). However, western-style bargaining is adopted for the purpose of constructing this preliminary typology. A product of capitalism and social democracy, the western model of bargaining is described by Barbash (1984) as 'love-hate, cooperation-conflict' relations. Parties have a common interest in maximizing benefit, but union and management have traditionally approached decision making as *adversaries* representing the opposing interests of cost reduction and

worker protection rather than sharing responsibility. “The ability of each side to withhold something of importance to the other is the first, if not always the sufficient, condition of bargaining” (p. 62).

Labour relations are not defined in the Oxford English Reference Dictionary (Pearsall & Trumble, 1995). The phrase, labour relations, is used in the present study to signify the exchange of a teacher’s labour for negotiated incentives. (Industrial relations imply a responsibility to a collective.) Walsh (1987) perceives that a teacher-employer relationship built on exchange rather than trust allows “employers to assert a form of bureaucratic contractual control” (p. 148). The growing specificity of teachers’ contracts and emphasis on technical skill invite appraisal and undermine professionalism.

Class Relations

Touraine (1965) perceives the workers’ movement to represent the interest of the majority of people and society as a whole, in opposition to a minority aimed at private profit. Unionism emphasizing social change finds its strength in *militant action*. Barbash (1984) suggests the mobilization of protest is the political equivalent to a strike. Barbash observes that, *in moderation, a union is able to function at two levels, mobilization and integration, thus preserving the double nature and the vitality of the workers’ movement*. The term, ‘class’, is frequently associated with Marxism and class struggles. However, for the present study *class relations connotes a political force seeking broad social change within a traditional hierarchy of authority*.

Historically significant movements, notes Touraine (1965), require a combination of two of the principles of social action: identity, opposition, and totality. Industrial unionism is clear on what to protect and against whom to fight without legitimizing union action socially. Touraine explains that social movements lacking definition of identity or adversary encounter internal disequilibrium and counter movements that organize around the missing principle. *The passage from awareness to organized action for social change is a form of politics characterized by alliances and compromise*.

Partner Relations

Participation, cooperation, and collaboration are terms to describe joint action of two or more entities in a partnership. A partnership is based on shared values and aimed at shared goals in the spirit of *mutual trust and benefit*. Fukuyama (1995) defines trust as

the expectation that arises within a community of regular, honest, and cooperative behavior, based on commonly shared norms, on the part of other members of that community. These norms can be about deep “value” questions like the nature of God or justice, but they also encompass secular norms like professional standards and codes of behavior. (p. 26)

Partnership is built on common interests and mutual respect, provides a forum to mediate diverging interests, and facilitates an understanding and an appreciation of each partner’s responsibilities and aspirations. Partnership is a reciprocal relationship that shapes the shared environment and each organization (Wheatley, 1992).

Jouen (1998) identifies three principles essential to an effective partnership: *independence, legitimacy, and substance*: (a) The principle of independence requires the distribution of key responsibilities among the various partners. No one party must play a subordinate role nor must the parties agree on all issues. Each party to the partnership has a responsibility to speak on behalf of, or be accountable to, their members or constituents. (b) The principle of legitimacy aims to overcome suspicions of partner motives and to ensure that the partnership thrives in spite of disagreements on specific issues. (c) The principle of substance recognizes the need for the partnership to address substantive issues, compared to a superficial exercise or ‘selective participatory decision making’ to create the perception of commitment (Weiler, 1983). The establishment of partnerships provides a forum for the parties to convince others of the importance of their convictions and requires flexibility in recognition of neutral or opposing positions on some issues. Jouen insists that “mutual respect and the search for consensus must guide those involved” (p. 28).

Payeur (1994) conducted a study of three American teacher unions involved in shared decision-making practices. Payeur found that consensus in problem solving requires learning different techniques than democratic practices. The American teachers’ experiences demonstrate participation requires: (a) a vision of education, (b) a strong union with clearly identified values and interests, (c) a process rather than a response, (d)

a supporting legal or institutional framework, and (e) delineation between the roles of teacher and teacher union representative. Union legitimacy, credibility, influence, and status in the community are reinforced in return for the increased participation of the union members. In unionism based on integration and partnership, observes Touraine (1974), discontent is expressed less in the mobilization of the membership and more in the functioning of the society. Ben-Ner (1993) notes “participants who have already collaborated together, having developed relationship-specific human and physical capital, are capable of generating more value than other combinations of participants” (p. 199; see also Fukuyama, 1995).

Partnerships are not without risk and criticism. Ben-Ner (1993) notes that cooperative behaviour requires special arrangements to facilitate communication, achieve agreement, and support commitments; non-cooperative behaviour surfaces more readily. Participatory models take time and are susceptible to environmental influences such as changes in participants. Partnership may lead to *assimilation* or *isolation* or serve as a *mechanism of control*. Integration suggests a loss of distinctness and autonomy of parties in the creation of a new entity. Touraine (1965) perceives the risk in a model of integration to be the potential ambiguity whereby the workers’ movement, in identifying with the change, may be assimilated and become an arm in the service of the state. Grace (1987) suggests that as a teacher union achieves the status of partner in the education enterprise and celebrates its professional influence, the union is distanced from other potential allies. Lawn (1996) describes professionalism as a double-edged sword, a fact apparent only in retrospect in the United Kingdom. Professionalism can be used to protect the teaching process or used to control teachers. Popkewitz (1987) perceives partnership and professionalism as ideological forms of state control of teachers “that make the control mechanism appear reasonable and credible” (p. 17; see also Ozga, 1985). Similarly, Gewirtz and Ozga (1990) distinguish “between a public appearance of negotiation and the internal processes of administrative control” (p. 47). A form of partnership not developed in the typology is one characterized by such imbalance in the trust relations and the manipulation or exploitation of one party by the other.

Partnership is vulnerable to political changes in values and structures. When “the central state in education *radically changes* its stance on the importance of state

schooling within the social formation and on its evaluation of teachers within that system, the ethic of legitimated professionalism is rendered virtually impotent” (Grace, 1987, italics in original, p. 222). Participation strategies also pose challenges to state controls. Gewirtz and Ozga (1990) note: “Indirect rule fosters feelings of independence and becomes unmanageable” (p. 40-41).

The Typology

The intersections of state modes of regulation and the corresponding means of union influence create three potential model relations with characteristics exclusive to each ideal-type. Commonalities in the theories and the interests in education reform suggest labour, class, and partner relations might best describe the interaction of organized teachers and states. Descriptions of the national circumstances surrounding organized teachers and state relations help to develop the ideal-typical models for a preliminary typology. The anticipated characteristics of the ideal-typical models follow in Table XII.

An economic rationalization of actions would characterize *labour relations*. Based on a neo-liberal ideology, a peripheral state would facilitate an open market. Decentralization of governance would support entrepreneurship in education and individual advancement through school choice. Teachers who are discipline specialists, and client preference, would shape the curriculum. The central objective of economic unionism would be the individual welfare of workers. The contest for economic gain would feature adversarial employer-employee relations. Primarily negotiations would be used to define the exchange of wages and benefits for teachers’ knowledge and work.

A social rationalization of actions would characterize *class relations*. Class relations focus on broad social change, rather than class struggle in the Marxist sense. A class state, employing regulation by authority, would impose rules and standards in a centralized system with conservative self-sustaining aims. Teachers would be perceived as technicians and would be expected to implement centrally prescribed programs. The

Table XII: A Preliminary Typology of Organized Teachers and State Relations

Context	Relations	Labour	Class	Partner
Theory				
Power Relations	Domination and Opposition		Participation	
Rationalization	Economic	Social	Political	
Society (State)				
State Structure	Peripheral	Class	Institutionalist	
Education Goals	Meritocratic	Reproductive	Transformative	
Regulation	Market	Authority	Trust (Mutual)	
Technology				
Organization Structure	Decentralization	Centralization	Bi-level	
Means of control	Competition, efficiency, incentives	Rules, standards, supervision	Empowerment: shared responsibility, invited supervision	
Motivation for Decentralization	Market	Corporate Managerial	Social democratic	
Individuality (Teacher and Teacher Organization)				
Interests	Worker	Advocate	Professional	
Goals	Individual	Collective	Shared re education	
Influence	Exchange (negotiate)	Oppose	Participate	
Unionism	Economic	Social	Political	
Knowledge				
Educational (Curriculum)	Teacher choice constrained by client	Government prescribed	Government and teacher joint development	
Professional	Disciplinary specialist	Technical knowledge, rules	Pedagogical and content knowledge plus judgment	
Exchanged for	Clients or employment	Wage	Status	
Teacher as	Specialist	Technician	Reflective practitioner	
Regulated by	Clients	Employer	Peers	

central objective of social unionism would be pursuit of the collective interests of workers and an egalitarian society. Alliances and the mobilization of membership and society would be the primary union means to advocate for social change.

A political rationalization of actions would characterize *partner relations*. Based on a social-democratic ideology, an institutionalist state would delegate authority to facilitate the market and maintain centralized regulatory responsibilities to correct market extremes. The state relies on professional commitment to formulate and implement education reform. Teachers are enabled to exercise judgment in tandem with knowledge in a reflective professional practice. The central objectives of political unionism would be to exercise professional responsibility and to contribute to the development and achievement of shared education goals. Participation within the institutional framework would be the union means to seek change and to enhance the influence and the status of the teaching profession.

Conclusion

The preliminary typology of relations between organized teachers and states is central to the conceptual framework (Figure 1, p. 44). The conceptual framework proposes that the type of state and organized teachers relations is a significant factor in determining the reform process and the nature of education reforms. Ideology, the legal and economic context, and individual personalities also influence the relations.

I propose a typology of organized teachers and state relations with caution. These are ideal-typical models, not ideals. Nor is it the intent to stereotype relations. Organized teachers have multiple interests; no one relationship is expected to fall entirely in only one category. Hence, the ideal-typical models are presented in overlapping circles in Figure 4. *Organized teachers need to draw on a variety of strategies to pursue any particular goal or to address any particular problem in a given context.* However,

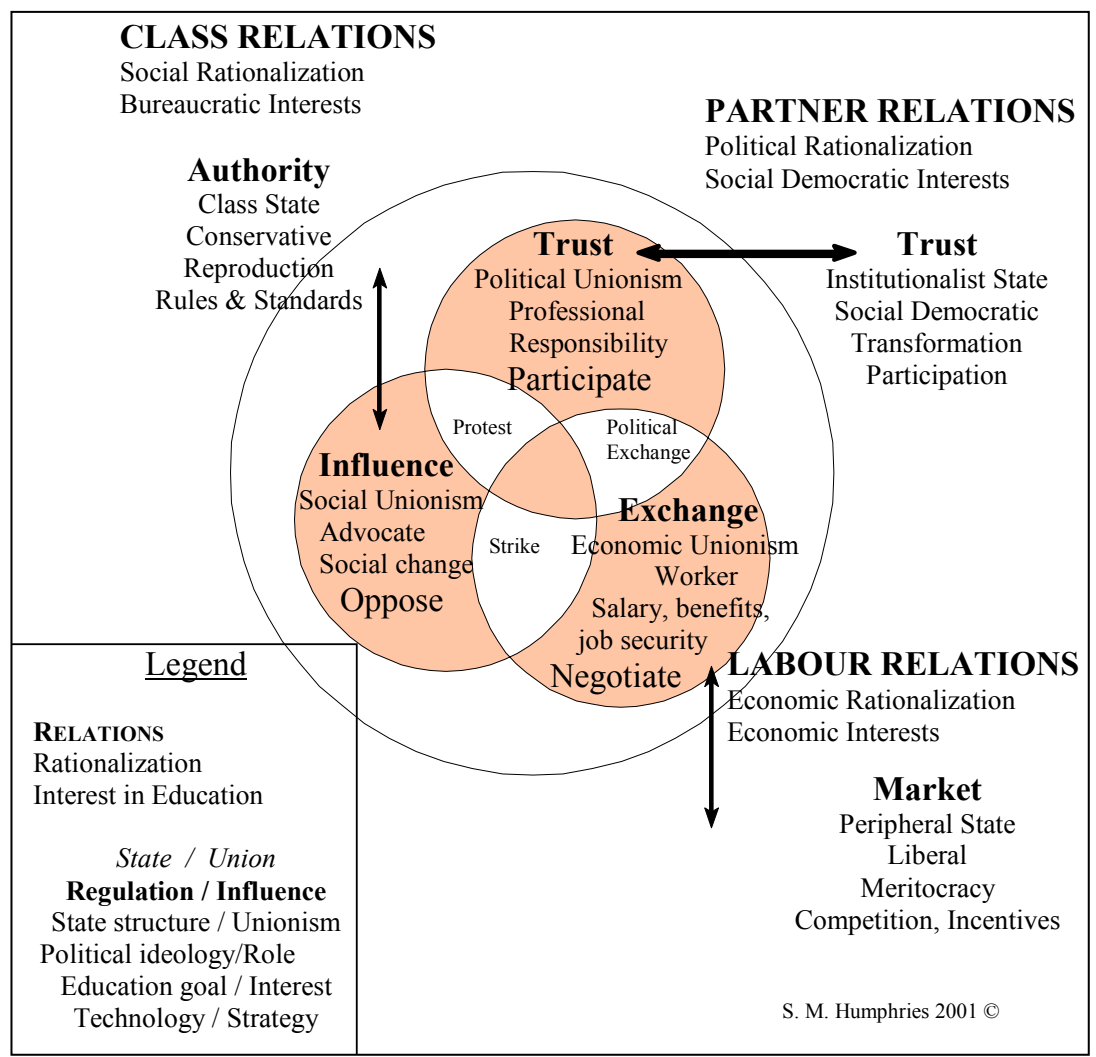


Figure 4: Three Preliminary Types of Organized Teachers and State Relations

comparison consciously framed by specific problems and theoretical perspectives can deepen knowledge (Schriewer, 1989/1990). A typology can facilitate an explanation of relations between organized teachers and the state.

In Chapter 4, the concept of comparison is explored. The research design and methodology are presented.

CHAPTER FOUR

RESEARCH DESIGN AND METHODOLOGY

A combination of sociology and history helps explain the dynamics of relations between organized teachers and the state with regard to education reform in three cases. The present *comparative study* borrows elements from *historical*, *case study*, and *Holmes' problem-solving* approaches to research. Qualitative and explanatory in nature, the study examines participant perspectives and documents, focuses on natural as compared to contrived settings, and provides a qualitative rather than a quantified account (Bogdan & Biklen, 1982). Comparison, methodological borrowing, and research phases are elements of the research design and methodology presented in this chapter.

Comparison

From an analysis of Piaget's stages of development, Eckstein (1983, p. 317) concludes that "comparison is inherent in human thinking and the development of this one faculty is in fact entwined in the development of all the human thinking processes." Choice or explaining variation, for example, always represent a comparison whether explicit or implicit (Öyen, 1990). Basic comparative operations identify similarities, arrange differences into graduated series, and discern differences (Schriewer, 1989). Comparison helps describe and explain. It is a source of and means to express new ideas by connecting knowns and unknowns. Uniqueness can only be established through comparison (Weber as cited in Novoa, 1995). Comparison permits us to classify and to develop typologies (Lê Thành Khôi, 1986) and serves to question assumptions, theories, and methodologies (Schriewer, 1989). It is a tool for inductive reasoning to solve problems (Van Daele, 1993) and an analogical and logical process to increase knowledge and establish truth (Lauwerys, 1972). Comparison is an instrument of logic essential to comparative methodology in education.

Schriewer (1989) defines comparison as "a mental act directed toward gaining knowledge by establishing relationships" (p. 390). He offers a cogent model of *two*

Table XIII: Comparison (Schriewer, 1989/1990)

Comparison is a mental activity directed toward establishing relationships to gain knowledge. Comparison uses the basic operations of identifying similarities and arranging differences into graduated series as applied in every day experience or discerns differences in a consciously framed social-scientific method.

Every Day Experience	A Social-Scientific Method
A mental operation of every day experience	A mental activity consciously framed by specific problems, theoretical perspectives to deepen knowledge
Comparison of factual aspects informed by observation: contrasting, carrying out classifications, identifying similar features, problems, developments (Simple)	Generalizable relationships from systematic exploration and analysis relating relationships between different phenomena or patterns of relationships to each other (Complex)
Descriptive: no evidential value as arguments relating to theoretical propositions, hypothesis, or explanatory models, no basis for reasoning	An orientation to theory: methodically mediating between cross-cultural data and social-scientific theories for purposes of theory formation, testing, and critique
Comparison implies resemblance: not able to ensure actual comparability of alternatives, blurring comparison with comparability, and comparability with resemblance.	Comparison of phenomena that resemble each other too much loses the advantage of comparison
<u>Universalization:</u> Compare likenesses and find commonalities	<u>Relativization:</u> Conscientiously understand differences and respect the fundamental values and beliefs of others
<u>Hierarchization:</u> Classification, series, gradations, hierarchies	<u>Conceptualization:</u> Theory formation

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comparative methods (Table XIII). Schriewer distinguishes between the use of comparison in *everyday thinking* and in *consciously framed thinking*. Everyday comparison is a simple operation comparing and describing observable factual aspects, seeking universally applicable commonalities, and arranging likenesses in series or hierarchies. A consciously framed or social-scientific method of comparison is oriented to theory. Consciously framed comparison is aimed at deepening knowledge, understanding differences, respecting diversity, and determining generalizable relationships from methodical analysis. Contrasting phenomena are the focus of systematic comparison that mediates between data and theories to conceptualize, test, and critique the theories.

Durkheim (as cited in Novoa, 1995) observes that comparison is to the social sciences what experimentation is to the natural sciences (see also Halls, 1990; Lê Thành Khôi, 1981; Robinsohn, 1992 posthumously). On the basis of the use of comparison as social-scientific method, Schriewer agrees with Durkheim's analogy. *The present study explains the connections between states and teacher organizations, using ideal-typical models constructed on social theories. The ideal types serve as a guide for a systematic comparison of the data.*

Controversy

The idea of comparison is not immune to debate. Some comparativists limit comparison to studying *similarities*. Robinsohn (1992, p. 35) observes that “the uniqueness which indeed characterizes any situation is not the object of comparison in the true sense.” Cirigliano (as cited in Campisano, 1988) claimed only likenesses can be compared and that the goal of comparative research was to determine commonalities. Schriewer (1989/1990) attributes identifying similarities and creating gradations to everyday mental operations while assigning the determination of *differences* to the more structured and complex comparative social science.

In a different line of reasoning that is also critical of comparison, Epstein (1983, 1990) suggests two contradictory meanings have arisen in the comparative education practices of positivists and relativists. *Positivists* perceive the purpose of comparison is to

generalize across the boundaries of cultures. *Relativists*, known also as culturalists, view comparison as a method to discover cultural absolutes regarding the unique character and nature of a nation's schools. Epstein (1990) judges the relativists' national character concept to be incompatible with and yet a viable alternative to the 'laws' of positivism. It is likely that Epstein would find Schriewer's (1989, 1990) model of comparison plausible. However, Epstein (1990) challenges the use of comparison in phenomenological research. Epstein appears not only to question the availability of comparison to neo-relativists as an instrument of logic but also to suggest that *phenomenologists, by questioning the objectivity of comparison, place any comparative study in question. This concern is of interest in relation to the intent to conduct comparative research in the present study.* Can any researcher compare objectively?

Smelser (as cited in Robinsohn, 1992) concludes that methodologically a *middle way* must be found *between positivist reductive objectivism and phenomenological relativist subjectivism.* As Robinsohn notes (1992), "a close analysis of metrical methods shows that they themselves must also rely on the preliminary understanding of experts" (p. 44). Research in the physical sciences has demonstrated there is some degree of interference and participation in creation by the act of observing itself at the subatomic level (Wheatley, 1992). *The best any comparativist can do is to acknowledge, endeavour to control, and account for a personal presence as well as the personal framework shaping efforts to compare objectively.*

Both simple and complex comparisons contribute to theory development. Schriewer (1997b) demonstrates the complementary contribution of both everyday and formally structured comparison in the development of reflective and scientific theories. Reflection theory, he notes, requires some form of *opening to the external environment* to interrupt its circular self-reference process. Connecting to world situations and placing the data in context are two such external reference points. The comparison of different points of view in context is another means of externalization that adds supplementary meaning. *Done across a number of cases Schriewer believes comparison of participants' interpretations in context can lead to theory development.* Also, Luhman and Schorr (as cited in Schriewer, 1997b) have identified three patterns of externalization. First is reference to general principles formulated by the sciences. Second is reference to values

and value-based ideologies to justify actions such as education reform. Third is reference to organization to externalize failure by off-loading responsibility onto politics or administration.

Theory development is done in a search for social meaning rather than to establish general laws regarding observable behaviour as in positivistic science. The logic of neo-relativists differs from the logic of positivists, but both use comparison as an instrument of logic. *Contrary to Epstein's concern, comparison is fundamental to diverse methodologies applied in comparative education. Furthermore, the provision of supplementary meaning by externalization relies upon simple operations of comparison.* According to Schriewer, externalization establishes validity in the development of reflective theories and counters arguments regarding the apparent methodological weakness of comparison as an everyday mental operation.

Conditions for Comparison

Comparative methodology “relies on the methods of a host of other fields, from philosophy to psychology, from literature to statistics” (Bereday, 1964, p. x; see also Campisano, 1988; Groux, 1997; Halls, 1990; Lê Thành Khôi, 1981, 1986; Kelly, 1992). However, comparativists using diverse methods such as case, ethnographic, or historical study, or statistical or systems analysis, share a specific methodological concern. The issue is “a concern for the development of valid methods of comparison” (Bereday, 1964, p. ix), that is, valid means and procedures to acquire knowledge by comparison.

Scholars call for rigour in comparative methods to capture the complexities of education and its relationship with society (Groux, 1997). They aim to clarify principles defining what studies comparative education encompasses and how knowledge may be created. *However, comparativists state that the field of comparative education is methodologically unable to enunciate general fundamental principles* (Campisano, 1988; Halls, 1990; Kelly, 1992; Meuris, 1997; Novoa, 1995; Van Daele, 1993; Watson, 1998).

For the purposes of the present study, in the absence of generally accepted principles, the term ‘conditions’ is selected as most appropriate to describe the basics required to conduct comparative research. Conditions, according to the Oxford English

Reference Dictionary (Pearsall & Trumble, 1995, p. 301), are circumstances affecting functioning or stipulations required for desired results. *The concept of conditions supports rigour in comparative methodology in the form of a self-regulating guide.*

Conditions essential to comparative methodology that emerge from the literature include *context and interdisciplinarity, impartiality, and comparability*. The need for accurate data is assumed. Some would add international to the list of conditions. However, the diversity of regions within nations and comparisons across time in one case, for example, would thus be precluded from recognized comparative study. *The three conditions and how the present study meets them* are now examined in detail.

Context and Interdisciplinarity

Context and interdisciplinarity require drawing on intellectual thought from a variety of disciplines. This resource situates the elements studied in the environment of *the education system and within the cultural, economic, historic, and political context*. The placement of education in the broader social context is a condition that contributes to validity and theory development. “Educational facts are deeply enmeshed in a matrix of other social circumstances. They cannot be compared without a careful accounting for the total situation” (Bereday, 1964, p. ix). Particular challenges to current comparativists arise from *globalization*. Education is both influenced by and amplifies the effects of globalization (Lessard, 1998). Schriewer (1997a) observes that in education, there exists a degree of global standardization of structures, models, and programs that shows education to be particularly accessible to the dynamic of globalization.

The phenomenon of globalization, accelerated by communication technology, transformed societies around the world and gave rise to post-modernism. As well as an impact on the objects and phenomena studied, globalization generates change in comparative methodology (Meuris, 1997; Schriewer, 1997a; Van Daele, 1993). Globalization and post-modernism create new problems and new purposes for comparative methodology in education.

Globalization. Comparative methods must account for growing interdependence among units of study and the consequent influences on culture. Three substantive effects arising from globalization are political transfiguration, social transformation, and social

relations. Political transfigurations occur through the changes in geopolitical groupings. Social transformations include pluralism and individualism. Social relations embrace the previously discussed connection between knowledge and power and the relationships between education and society. To account for cultural diffusion and transnational interdependence, methods must incorporate *global analysis*, a more *interactive perspective*, and *historical reconstruction* (Lessard, 1998; Schriewer, 1997a). The present study attends to these three components.

Attention to the *international experience* is achieved through a review of the literature and situating the cases and elements studied in the global context. An analysis of the literature identifying global trends in education reform determined the selection of themes and related factors for potential study. Comparison of cases on two continents inherently demands analysis of international themes.

A more *interactive perspective* is captured in three ways. First, participants facilitated the choice of elements to be examined by identifying issues as more or less significant. Second, participants were invited to verify the analysis of their interviews by theme, not just affirm the accuracy of a transcript of the interview. Third, selected participants from each case were invited to critique the description for the relevant case.

To achieve *historical reconstruction*, Debeauvais (1997) and Judge (1988) promote in-depth analysis on a limited number of carefully defined themes in a limited number of settings. The depth of analysis is done to achieve a sense of cultural and historical reality and to appreciate different actors' strategies in each situation. The present study examines the influence of the relations between the state and organized teachers on *three themes of education reform in three research settings*. The cases are the state of *Victoria in Australia* and the provinces of *Québec and Saskatchewan in Canada*. The themes are *educational knowledge, governance, and accountability*. Elements of these themes have an impact on the nature of teachers' work and subsequently an impact on teacher professionalization and teacher unionism. Based on the literature and the experience with the three cases, seven *factors representative of the three themes* are reported. Not all factors are issues in all three cases. The themes and factors are used as the headings in the following three chapters to consistently organize the presentation of

education reforms in the writing of each case. The factors are presented in the following three paragraphs.

1. *Educational knowledge* refers to the curriculum, the most significant determinant of teachers' work. Education goals and policy guide curriculum choices and determine the locus of power to make curriculum choices. As a consequence, the present study identifies (a) the broad education objectives and curriculum frameworks for each case, and examines (b) the processes to determine education goals, education policy, and curriculum.

2. *Governance* speaks to the locus and degree of local autonomy and decision-making power regarding education. The present study focuses on the movement to centralize or decentralize responsibility (c) for funds, (d) for managing school operations, and as noted in (b), for determining curriculum. Restructuring initiatives that do not shift the balance of power are noted.

3. *Accountability* contributes to the debate about teacher professional status. The present study examines the procedures and locus of responsibility for (e) teacher certification and conduct, (f) teacher appraisal, and (g) student evaluation.

The implication for *teacher unionism* of legislated changes to the education system or to the mandate, operations, or structure of the teacher organization is discussed. The impact of education reforms on *teacher professionalization* is described in the presentation of the reforms with limited discussion.

In addition to a concentrated focus, an analysis of participants' experiences and a review of the literature and documents obtained on site facilitate a socio-historic reconstruction.

Post-modernism. Globalization transformed societies around the world and gave rise to post-modernism. Like globalization, post-modernism creates new challenges for comparative methodology in education. *Pluralism, individualism, and the concept of not just one but many different ways of knowing*, all require new models, different units of comparison, and new approaches (Meuris, 1997; Novoa, 1995; Watson, 1998). "All the lessons of psychiatry, psychology, social work, indeed culture, have taught us over the last hundred years that it is the acceptance of differences, not the search for similarities

which enables people to relate to each other in their personal or family lives. This is doubly true in a country” (Saul, 1997, p. 411).

The break down of political units and the creation of culturally or economically based regions locally and globally, forces a rethinking of three factors in education comparison in particular. First, the source of initiatives for change may be internal or external to the unit of study and hence the change may be proactive or reactive. Second, the sites of decision making may be governments or non-democratic bodies that create laws and regulations that are binding on elected governments, on nations, or on coalitions of nations. Third, the place of the nation state as the unit of study may be questioned (Watson, 1998).

Two Canadian provinces and one Australian state are the units of comparison considered in the present study. Where relevant, the national context is explored. Although sources of initiatives may be external and global, provincial and state governments continue to have authority and responsibility for public education and the opportunity to be proactive as well as reactive in initiating change. The focus of the present study is the relation between the state, including government politicians and bureaucrats with responsibility for education, and organized teachers represented by members and the political and administrative leaders of the teacher organizations.

Impartiality

“Comparative studies release us from the boundaries of our habits of thought, and show us the wide gamut of patterns possible in human interaction” (Ruth Benedict as cited in Etzioni, 1975, p. xiv). At least comparative studies hold the potential “to allow us to see our own cultural presuppositions more clearly” (Cochrane, 1987a). Impartiality is the second condition for comparative study.

An actor critical in the application of comparative methods is the researcher or comparativist. Impartiality requires the researcher to *minimize ideological and ethnocentric influences* (Lê Thành Khôi, 1981). Comparative education techniques are not neutral due to the political nature of the object of study and preconceptions such as personality, professional specialization, material circumstances, and nationalism. The factors listed influence perception of different cultures (Lê Thành Khôi, 1981; Novoa,

1995). Bereday (1964) suggests preparation for comparative research requires knowledge of the related language, residence abroad, and control of personal bias. He describes “cultural bias [as] the plague of comparative methodology, tragic in a discipline expressly dedicated to the breaking down of ethnocentrism” (p. 159).

The traditional ideology of progress underpinning comparative education has hidden ethnocentric biases in defining education (Cowan, 1990; Novoa, 1995). This practice is changing. The ethical and professional responsibility “to understand the acceptable terms on which to act upon the world - and on whose behalf . . . [and] the question of how to act breaks the old consensus” (Cowan, 1990, p. 338). Comparative scholars are advised to be conscious of the limitations of their interpretations (Novoa, 1995), be attentive to and account for personal interests in interpretations (Lauwerys, 1972), and to identify explicitly the ideological roots of their orientation (Epstein, 1983). Cowan (1990) observes that self-consciousness about theoretical implications is less likely to result in imbalance in knowledge and more likely to better prepare a response to intended knowledge hegemony. Ideology and ethnocentrism influence comparative methods from the choice of a problem to study through the interpretation of data. Novoa (1995) suggests that to identify new questions and to create new histories that haven’t been told, there needs to be a change in the point of observation. The present study offers the perspective of a staff member employed by a teacher organization.

There are *four significant personal factors* that frame the current study. First, as a teacher I have an affinity with educators. I assess government policy decisions in light of their influence on learning and teaching conditions and their impact on professional voice in education affairs. This examination of power distribution might be construed as a Critic orientation. Second, I am native to Saskatchewan and proud of the cooperative and social democratic heritage of that Canadian province. I appreciate the historical and social influences on both education affairs and my personal development. Third, I am of Anglo-Saxon origin and familiar with the concepts of the English language particularly as they have evolved in Canada and as they are applied in education in Saskatchewan. Fourth, I am female and view the world from a woman’s perspective.

Family members who were or are engaged in a variety of small business, management, and effectiveness-audit functions afford me some empathy for the

management perspective. A personal interest in understanding, not just knowing, and an ethic of participation nurtured by cooperative relations in Saskatchewan, contribute to my inquiring attitude. Temporary residence of nine months or more in different regions of Canada developed an appreciation for different cultures. I resided in Davis Inlet, a small isolated Naskapi Indian community in Labrador; in Montréal and in Québec City, large francophone urban centers in Québec; and in small rural and urban centers in Saskatchewan. In the acquisition of French as a functional second language, I gained first hand appreciation of the potential for misunderstandings in intercultural communication. Extensive travel on various continents for both business and personal reasons, including eleven months in Australia, has contributed to my appreciation of and respect for diversity.

Comparability

The third condition for a credible comparative study, comparability, calls for ensuring units of comparison are comparable in purpose and meaning. Halls (1990) cautions that not everything is wholly comparable. The basis for comparison must be comparable items such as laws with laws and structures with structures, rather than inequitable units or practices or concepts projected on another setting. Comparison requires additional caution when used inter-culturally to ensure equivalence in the significance assigned to terms between languages and the comparability of statistical data (Lê Thành Khôi, 1981; OECD/OCDE as cited in Groux, 1997; Van Daele, 1993).

The selection of *cases from western post-industrial democracies* and an examination of *global influences* place the cases in the present study in a common setting. Attention to differing contexts such as the composition and volume of teacher organization membership, cultural influences, and sensitivity to history, guide the present research. Each participant affirmed or corrected an analysis of the interview by theme, and thus helped develop an understanding of related concepts.

This section examined the concept of comparison and conditions necessary to a comparative study. *Context and interdisciplinarity, impartiality, and comparability are conditions essential to comparative methodology.* The means by which the present study

meets the three conditions was described. The following section presents approaches to research relevant to the present comparative study.

Research Methodology

Methodology shapes knowledge. An advantage of no single methodology governing comparison in education is the variety of optional research styles, forms of explanation, ways of knowing and understanding, and topics of investigation. The inclusion of qualitative inquiry in a comparative study, in particular, provides greater flexibility and more sensitivity to complex situations (Robinson, 1992). A socio-historical approach to the present research contributes a sense of the complexity in the study of education. The present qualitative research draws on elements of case study, historical, and Holmes' problem-solving approaches. Case studies access a social perspective that helps connect theory and practice. The research phases follow a combination of the basic procedures used in historical studies and Holmes' problem-solving approach.

A Socio-Historical Approach

The challenge in comparative methodology is to grasp the uniqueness of each case to articulate a comparative and historical account without neglecting factors found beyond the respective histories. There is a need to understand the subjective nature and sense attributed to knowledge that legitimizes multiple ways to view the world, to attend to history and theory in preference to description and interpretation, and to focus on content rather than results (Novoa, 1995). *Articulating uniqueness within a global context* is accomplished by separating analysis of the general and the particular. This separation is done to grasp the complexity of the phenomena of globalization and localization, the big and the small as two moments of the same historic process (Novoa, 1995).

Lessard and Tardif (1996) observe that with increasing pluralism [and acceptance of different ways of knowing], boundaries between disciplines and between research traditions and methodologies give way. Research that considers a phenomenon from a

variety of angles, using more than one discipline and diverse sources of data, better captures the essence and complexity of the phenomenon studied. The co-authors support a bi-disciplinary research approach. They employ a macro sociological perspective found in a global history and a micro sociological perspective based on the history of individuals. The macro perspective traces a chronology of events; the micro perspective gives access to actors interacting in situation. Thus, attention to individual stories in the larger socio-historical context is another means to better understand the complexity of the relationship and to articulate uniqueness within a global context.

A combination of history and sociology contributes a sense of complexity and change in education and offers a theoretical framework (Grace, 1987; Kaestle, 1997). Kaestle notes that theory enables historical researchers to “better identify their informal, personal theories. More important, [researchers] can shape their understanding of human experience by learning from other disciplines. Finally, historical work can reflect back in important ways on social theories” (p. 79). Lê Thành Khôi (1981) suggests that social theories organize around the paradigms of conflict and equilibrium. Sociologists investigate, and make explicit, knowledge about forms of social control. Consciousness-raising regarding *the ideological effect*, studying *power relationships*, and exploring the connection between *political legitimacy and the legitimization of knowledge in education* are three significant contributions of sociology to the study of education that are pertinent to the present study.

The use of *case studies* injects the social perspective in the present inquiry. As Hamel (1997) suggests, the case study works hand in hand with sociology. The case study offers comprehensive descriptions often based on information collected from actors in an event by methods such as interviews and observation. Rich description deepens the researcher’s understanding of a situation and its meaning for participants. Hamel describes rich description as the cornerstone for the passage or transposition from daily experience to the theory that explains the experience.

Hamel (1997) provides guidance in the writing of a case study. The writing of the description must *both distinguish and bridge the differences of the two types of knowledge that are in play*. There must be a difference in the vocabulary that describes the *practical knowledge* and the vocabulary that is testimony to the *theoretical*

knowledge. Descriptions presented in a combination of the language of the social sciences and the language of daily life permit a grasp of how the researcher constructs, in theoretical language, the object of study defined in the language of daily use (Chapoulie (1984) as cited in Hamel, 1997). This *differentiation* is seen *also in the object of study and the object of the research*. The case is desirable to the extent that it serves as the means to explain the object of study. Hamel observes the author of a case has the obligation to be insistent and explicit in the explanation of the qualities of the case because explanation gives life to the theory.

Firestone and Herriott (1984) promote a formalization of qualitative research in multi-site studies to coordinate data collection thus optimizing description, yet enabling generalizations. Formalization emphasizes a disciplined and systematic procedure to increase accuracy and credibility. The *multi-site approach* features explanation, a multi-person team for numerous sites, the codification of questions and variables before beginning the fieldwork, the use of semi-structured interviews, and the systematic reduction of verbal narrative to codes and categories.

Two elements of multi-site case study research are pertinent to the present study. First, the researcher selected the *semi-structured interview* as the research tool. The semi-structured interview ensures comparability across multiple cases on a core of questions prepared in advance, yet enables the flexibility and freedom offered by the in-depth exploration of issues that surface during the interview (Firestone & Harriet, 1984; Gall, Borg, & Gall, 1996). Second, the *formalization of data collection* facilitates the comparison of three cases in the present study, enables an emphasis on explanation, and allows generalizations. When, as in the present research, the study looks at the development of a contemporary event over time, there is an overlapping of the case study with the historical study approach (Bogdan & Biklen, 1982).

Historical research studies a variety of phenomena as they occurred in the past and as they evolved and transformed over time. Saul (1997) believes history can help us to understand how individuals and society work but notes this understanding is deterred by ideology that shapes language and debate. Saul suggests that “*history is far less about truth than it is about identifying shapes and patterns*” (p. 391, italics added).

The setting and antecedents of an event influence human behaviour. Setting and antecedents are significant to understanding causes and effects in past events (Bogdan & Biklen, 1982; Gall et al., 1996; Merriam, 1988; Rury, 1993). A study of our history also reminds us of the symbols and traditions that link us with our community and renews our understanding of the beliefs and principles that framed and helped shape the present (Gall et al., 1996; Kaestle, 1988). In building a description of organized teachers and state relations, the past is significant to understanding influences on the relations and the impact of historic relations on change. The personal accounts shared in articulating perceptions of organized teachers and state relations contribute to the oral history of teacher organizations and the evolution of public education.

Study across time requires care. Kaestle (1997) cautions the historical researcher not to infer intent from consequences and to seek evidence of intent at the time an action is taken. A review of primary documents and secondary socio-historic documentation moderate the passage of time in the present study. Kaestle observes that too often there is discrepancy between opinion and behaviour and that evidence of how people behaved is lacking, that is, “exhortations about educational policies often fall on deaf ears” (p. 80). The historical nature of the present study permits some opportunity to let action speak with the passage of time. A researcher of historical events also must be highly sensitive to presentism and personal bias. Presentism is “assuming that terms had their present-day connotations in the past” (Kaestle, 1988, p. 69) and “the interpretation of past events using concepts and perspectives that originated in more recent times” (Gall et al., 1996, p. 662). Personal bias enters the examination of history as a researcher conceptualizes a problem, then collects and interprets the data, filtering it through personal values, experiences, and perspectives (Bogdan & Biklen, 1982; Gall et al., 1996; Kaestle, 1988; Merriam, 1988). My frames of reference are discussed in the context of impartiality as a condition of comparative study.

Shulman (1988) observes that “history more than most other disciplines, is a hybrid, a methodological home for a wide variety of approaches, techniques and modes of inquiry” (p. 4). However, there are *three steps* common across most historical studies: clearly define what is to be investigated; identify, locate, and evaluate sources of data; and analyze and report the pertinent data within an interpretive framework (Cohen &

Manion, 1994; Gall et al., 1996; Rury, 1993). These steps form the basis for the research phases of the present study.

Holmes (1981) advocates a *problem-solving approach* in seeking a compromise between theoretical and practical purposes in comparative research. Holmes proposes that *comparative research to examine particular structures and social relationships be guided by ideal-typical normative models* as noted in Chapter 3. Holmes suggests *knowledge of national circumstances facilitates the examination of social relationships*, places education goals in relation to normative statements, and thus enables the prediction of the success of implementation of government policy. Beliefs about society, teachers and their institutions, and knowledge in education are incorporated in the ideal types to develop the circumstances of each site. Attention is given to education policy formulation, adoption, and evidence of implementation related to seven factors in three reform themes as noted. Change processes and reforms interact with the ideology perceived to guide government policy decisions for each ideal-typical model of relations.

Holmes' (1981) problem-solving approach has five steps: *problem identification, classification of problem information and data, organization of ideal types, analysis and comparison, and prediction in context*. The classification of problem information and the organization of ideal types are research phases in the present study that enhance the steps common to historical research. The typology constructed serves as the interpretive framework used in historical studies for the analysis and reporting of the data.

Successive Research Phases

A combination of Holmes' (1981) problem-solving procedures and steps common across most historical studies guides the *successive phases* in the conduct of the present comparative research. *A five-step process is used*. First, a clear definition of what is to be investigated lays the foundation. The second step requires building, from problem information, the anticipated picture in the form of ideal-typical models of relations between the state and organized teachers. Third, data sources are located, evaluated, and collected. Fourth, an interaction of the data, theory, and observation form the basis for the case construction and explanation. The preliminary typology serves as an interpretive

framework. Finally, the preliminary typology is modified to incorporate lessons from the data. The research procedures are reported in the following paragraphs.

Problem Definition and Typology Development

Collateral reading, as well as developing understanding of contextual issues, serves to delimit the research problem, stimulate one's thinking about methodology, and provide information about sources of historical data (Rury, 1993; Gall et al., 1996). The present study is rooted in a personal interest to better understand the relations between the state and the teacher organization in Saskatchewan by comparison with, and better appreciation of, the work milieu and states and organized teachers relations elsewhere. The application of social theories to the study of education contributed to the development of a typology of organized teachers and state relations. Of particular interest is the role of ideology in guiding education policy and in shaping relations between organized teachers and states. Work reorganization in industry, reform in education, and education policy each demonstrate the influence of ideology regarding the processes and types of change.

A scan of existing structures and relations in education decision making identified potential cases representative of three ideal-typical models of relations that were identified in the preliminary typology. An economic model based on exchange is suggested in the reliance on the Australian Industrial Relations Commission to arbitrate "awards" in Victoria, Australia. A model of opposition to government is apparent in the quest for social change in Québec, Canada. A participatory model is evident in the focus on broad education issues in Saskatchewan, Canada. Education reforms regarding the determination of knowledge in education, the locus of education governance, and accountability for public education are studied. These themes have an impact on the nature of teachers' work and subsequently an impact on teacher professionalism and the activities of teacher organizations. Education reforms can have a direct impact on unions, due to legislated changes to the union's structure and mandate. Although not discussed, reforms also have implications for teacher professionalization. Attitudes toward teacher unionism are noted.

The purpose of the present socio-historical research is to explain by comparison, diverse types of relations between states and organized teachers. Education reform serves as the vehicle to explore the relations. Knowledge and understanding of the influence on education reform of organized teachers and state relations can assist states and teacher unions. Politicians, bureaucrats, and teachers can appreciate and develop their respective roles in the reform of education, with the goal to strengthen democratic communities. The present research contributes knowledge of the role of ideology in education reform and relations in education.

Data Collection

Data identification and evaluation follow problem definition. LeCompte and Goetz (1984) note that combinations of strategies to collect data “provide more complete and complex data on phenomena than do unimodal research designs” (p. 39). Triangulation, the collection of data by more than one and dissimilar methods, offers different viewpoints about the issue under study and is used to demonstrate congruency and establish validity (Gall et al., 1996; Merriam, 1988). For the present study, *two research tools are used: interviews and reviews of original and secondary socio-historic documents*. The description of each case in context and the comparison of three cases create external reference points, thus strengthening validity and contributing to theory development in the present study (Schriewer, 1997b).

Gall, Borg, and Gall (1996) note that “some historians conduct oral interviews of individuals who witnessed or participated in events of potential historical significance” (p. 654). Interviews range from the formal pattern of questioning determined in advance to the non-directive interview derived from the therapeutic interview (Cohen & Manion, 1994). In the present instance, *semi-structured interviews* elicit participants’ perceptions. The background regarding the study, the form to indicate consent to participate, and the interview guide were made available to potential participants along with the invitation to participate (Appendix A). The interview questions were modified following a pilot interview in French with a bilingual individual. Using the questions as a base, I probed to explore issues, to test information and ideas gained in previous interviews, or to clarify understanding of the interviewee’s thinking. Field notes, and with participants’

permission, audio recordings were used to record the interview data (Bogdan & Biklen, 1982). One individual declined the audio recording. One joint interview of two individuals was not recorded for technical reasons.

Purposive or criterion-based rather than random sampling was used to select interviewees. “Purposive sampling is based on the assumption that one wants to discover, understand and gain insight; therefore one needs to select a sample from which one can learn the most” (Merriam, 1988, p. 48). *Sampling in the present study occurs in the selection of the cases to facilitate comparison and contrast, the selection of those to interview, and the selection of primary and socio-historic documents.*

Participants. The present study relies upon interviews with participants as the primary source of data. LeCompte and Goetz (1984) caution that key informants who have access to observations and perspectives in time and space denied a researcher should be chosen with care to ensure representativeness. Participants were selected from among individuals with work experience in the education system (Appendix B). One individual without work experience in the public education system participated in an interview on the invitation of an invited interviewee who was constrained by time. The experience demonstrated a resource for future research however the data are not incorporated. Some individuals who offered expertise in specific areas relevant to the present research and who worked within or outside the education system served as resource people (Appendix B). Resource people did not receive the interview guide and were not asked the range of questions put to interviewees. Through these contacts I also sought leads to local issues, potential interviewees, and written resources.

Once in the field in 1998, it became apparent that numerous interviews would be required to represent adequately and fairly the complexity of groups having an interest in the teacher organization and state relations in each case over a period of time. The period under study differed in each of the three cases and spanned at least one change of political party in government. Covering a period of transition in government introduced a related diversity in political party perspectives. The voice of senior education bureaucrats was difficult to adequately represent in Victoria, due in part to the structure with the state as the single employer of teachers. In Canada, school division trustees and school division administrators had additional roles in the education system with important

perspectives to tap. Within the teacher organizations, the political and administrative leadership over time offered readily available perspectives. The benefit of the national teachers' organization perspective became apparent and was incorporated.

The proposed sampling did not provide for practitioners' voices, that is, principals and teachers in schools. In Victoria, by chance meeting, I was invited to visit schools in a rural community. The teachers and school principals who volunteered to meet with me did not receive the interview guide in advance. I observed and heard of the impact of changes in the education system on teacher work, teacher professionalism, and teacher morale. Changes also had an impact on the roles of school principals and the teacher unions. This experience in Victoria caused me to seek the voice of teachers and school principals in the remaining cases. I conducted interviews in two schools in one rural community and one urban school in Victoria, one urban and one suburban school in Québec, and one urban and two rural schools in Saskatchewan. In three schools, one in each case, three to six teachers volunteered to participate. In Québec, four teachers participated in a group interview in French. However, data were attributed to each individual when reported. In Victoria, two individuals participated in one interview. The data were reported as one interview.

The present study incorporates 115 interviews with 108 people. Seventy-four interviews with seventy-eight participants were conducted from November 1998 to April 1999. One interviewee withdrew from the study; the data were not used from one interview as noted, for a total of eighty interviewees. The interviews conducted can be classified in three broad categories of people associated with the teacher union, the state, and with neither the state nor the teacher union. Those associated with the teacher organizations numbered 43. This total includes 16 people who are or were hired staff. Of the 27 union members interviewed, four are school principals and 23 are teachers. Of the teachers interviewed, seven serve full time as elected presidents of the union at the local, provincial-state, or national level.

The *17 participants attached to the state* are six politicians from two different political parties in each case who served as minister of education, two former political advisors to a minister of education and nine present and former senior bureaucrats with responsibilities regarding education. *Interviews with 18 individuals who were neither*

directly associated with the state nor organized teachers provided an informed external perspective. Participants included four school principals who are not members of the teacher union, two school principal association presidents, five faculty members of teacher training institutions, four school district administrators, one curriculum coordinator, and two trustee association senior administrators.

Relevant data regarding the Saskatchewan Teachers' Federation are included from 34 interviews conducted between November 1996 and February 1997 and seven interviews conducted during May and June 1997. Eleven participants in Saskatchewan were interviewed in both 1997 and 1999. In each case, the participant is considered to bring a personal perspective that is not necessarily representative of the organization. The multiple perspectives from the interviewees' diverse roles in education enrich the data and offer supplementary meaning thus increasing validity (Schriever, 1997b).

All records of the data will be destroyed upon acceptance of the thesis by the University or, by mutual agreement of the interviewee and myself, the original audio recording or reporting by theme or both may be retained in a mutually agreed upon archive.

Documents. To demonstrate the evolution of organized teachers and state relations and to reduce reliance solely on interviewees, information was affirmed, clarified, and augmented by an examination of locally authored literature and relevant primary documents. Union records carry "debates over strategic choices and provide evidence of espoused strategy" (Boxall & Haynes, 1997, p. 576); publicly reported events such as major disputes testify to strategy-in-action. External and internal criticism are the processes used respectively to determine if the claimed origin of a written communication corresponds to its actual origin and to evaluate the accuracy and worth of the contents of a historical document or record (Gall et al., 1996). Documents were obtained primarily from the departments of education, teacher organizations and their respective web sites where original records were readily available.

The range of written and symbolic records is a rich resource that can be a disadvantage without screening for relevance to the research question and suitability for the analysis proposed. LeCompte and Goetz (1984) identify "overcollection of unselected data [as] a serious problem in the use of both noninteractive and interactive methods of

data collection” (p. 53). Documents were selected for their contribution to demonstrating or building understanding of the relations between organized teachers and the state.

Differences in the type and nature of documentation guiding operations and relations in the three cases soon became apparent. It is the differences rather than the content of the primary documents themselves that are examined:

1. *Teacher organizations*: (a) source of authority, (b) policy statements or action plans, (c) selected annual reports, and (d) diverse communications including the web site;

2. *Departments of education*: (a) legislation and regulations, (b) department policy statements, (c) annual reports on the education system, and (d) the department web site;

3. *Records and practices defining the relationship between the state and organized teachers*: (a) the legal framework and (b) the collective agreement;

4. *Miscellaneous secondary resources*: reports, books, articles, and research dealing with the development of each jurisdiction, its public education system, and education reform.

Secondary socio-historical documents were added once on site when it became apparent that such a rich resource existed, particularly in Victoria and Québec. The analysis and reporting by secondary sources, demonstrated the interaction of actors in situation, affirmed participant-generated data, provided local insight, and raised new questions or lines of inquiry. As noted by Lessard and Tardif (1996, p. 294), it is important to multiply sources of information and strategies to access the reality studied. Multiple sources support consideration of macro and micro sociological dimensions.

Data Analysis and Reporting

Data and information acquire meaning through analysis, by “integrating and making sense out of the collected materials” (Bogdan & Biklen, 1982, p. 145). For the present study, a composite of Holmes’ problem-solving, multi-site case study, and historical research approaches is used.

Typology development. Initially themes and units of meaning in the problem information acquired through a review of the literature were classified and organized into proposed ideal-typical models of organized teachers and state relations. The use of the

typology is in keeping with the formalization of qualitative research and the explanatory aims of multi-site case studies. The typology also offers the interpretive framework characteristic of historical research for purposes of analyzing and reporting the data.

Data analysis. The identification of variables used to analyze and classify the data (Appendix C) occurred prior to beginning the fieldwork. The proposed frame for data classification was modified based on an analysis of four interviews. One interview was selected from each of Victoria and Saskatchewan and two from Québec, a francophone and an anglophone. Together the interviews selected represented state, teacher union, and neither state nor teacher union perspectives.

The interviews conducted in French were transcribed professionally. I pre-coded the field notes then classified the data by theme as I transcribed or translated the data. Data classified by theme and reported in English were sent to all participants for verification as an accurate reflection of the interview. The reporting process was explained to interviewees at the time of the interview. One francophone expressed concern about inadequate comprehension in reading English. Upon receipt of the thematic presentation, one interviewee expressed concern about misrepresentation, initially offered to correct the perceived errors, but then withdrew from the study. A second interviewee observed that although comments were taken out of context, the report by theme did accurately reflect the interview. The majority of interviewees made minor editorial changes and corrected the spelling of proper nouns or made no comment.

Reporting. The data are presented by case in Chapters 5, 6, and 7 and explained as guided by the relevant ideal type from the preliminary typology. In the effort to reconcile participant confidentiality, translations, and the transition between oral and written accounts, participant contributions, whether verbatim, paraphrased, or a combination of individuals' expressions, are acknowledge but not quoted. However, where nine or more participants support an observation, and all three groups of participants are represented, the number of participants is stated as a fraction or a number and the individual codes are not listed. In these ways all participants are similarly recognized. A sense of participant dialogue is maintained in the flow of the language and in the play of affirming, opposing, and diverse reactions among views expressed.

Where possible, participant language is used to describe the case. In parallel, the typology is used to explain the cases. This approach both distinguishes and bridges the two types of knowledge at work: the participants' language of their experience and the applied language in the theory that explains the experience (Hamel, 1997). This rich description with explanation is an interaction of the data, socio-historical documentation, the theory, and observation, and is not reducible to any one source. The mosaic created may not tell the whole truth, but helps to identify historical patterns in the diverse relations. In each case the appropriateness of the ideal type is assessed.

At least four individuals from each case: one state representative, one union representative, one neither state nor union, and one other on-site person, were invited to review the construct (Appendix D). For the Québec case, invitations were extended to at least *one anglophone* and *one francophone* reviewer. At least one comprehensive review of two or more pages of comments was received regarding each case. At least two reviewers replied for each case.

Reviewer comments attended to the presentation of the data, as well as to the plausibility of the case description and explanation. In all three cases review comments recommended differentiation of the participant data by group. A 'T' preceding the number code was added to identify those participants associated with the teacher organizations. The numbers of participants from the other two groups are considered too small in any one case to ensure participant confidentiality. Strictly number codes are retained for those two groups.

In two of the three cases, reviewers commented on some discomfort with the use of both socio-historic references and acknowledgement of participants on any statement or event. Most frequently, it is the participant voice that instigated the search for or drew attention to relevant documentation. Hence, both the documentation and the participants are acknowledged. Feedback specific to each case is incorporated with acknowledgement only in the form of the participant's code where appropriate.

In Chapter 8 the research project is summarized and the interaction of education reforms and reform processes with organized teachers and state relations in the three cases is described. The preliminary typology is modified to construct ideal types

meaningful in explaining the dynamics of relations between organized teachers and states.

Conclusion

Four methods used in the present study are intended to strengthen validity, contribute to theory development, and permit the explanation of state and organized teachers relations in other similar contexts.

1. The study identifies and attends to three conditions essential to comparative methodology: context and interdisciplinarity, impartiality, and comparability. The study is socio-historical in nature and presents the researcher's frame of reference. The cases were selected from among western post-industrial democracies, and participants reviewed a reporting of their interview data categorized by pre-determined themes.

2. A disciplined and systematic approach to data collection and analysis through the use of semi-structured interviews and pre-determined categories in the analysis of the interview data optimize description and enable generalizability across the cases (Firestone & Herriott, 1984).

3. The explanation of the known qualities of a case in an ideal-typical model enhances its representative value and facilitates case comparison (Holmes, 1981). The insistent explanation of known qualities of a case gives life to the theory (Hamel, 1997).

4. The use of external references from multiple perspectives places the case descriptions in context. Comparing cases to the preliminary typology and to one another breaks the circular pattern of self-reference, enhances the validity of the study, and permits theory development (Schriewer, 1997b).

The writing of the cases in Chapters 5, 6, and 7 endeavours to bridge the practical knowledge, describing experience, and the theoretical knowledge, explaining and giving meaning to the cases. Chapter 5 presents the case of Victoria, Australia.

CHAPTER FIVE

LABOUR RELATIONS IN VICTORIA, AUSTRALIA

Based on Australian industrial structures and post-1992 legislative changes and practices as portrayed in the literature, the proposed labour-relations model might best explain the interaction between organized teachers and the state in Victoria during the 1990s. The typology proposes an economic rationalization of labour relations. The model anticipates that a peripheral state employing market regulation would frame the relationship. A peripheral state would facilitate the free market. The teacher union would pursue the interests of individual workers through negotiations. Economic unionism would focus on the exchange of teacher labour for negotiated incentives. Curriculum decentralization and teachers as specialists would characterize knowledge in education.

In Victoria, post-1992, reforms exemplify an economic rationalization that also maintains historical class differentiation. Through decentralization of school operations, the state facilitated the free market. However, state-determined curriculum and accountability measures permitted little diversity. State strategies marginalized organized teachers. Teacher unions had no influence on education reforms. Through the use of the federal industrial relations system, a newly amalgamated teacher union enforced state participation in formalized relations regarding labour-related issues.

The following sections address the comparability of Australia and Canada and highlight the history of Victoria, its governments, teacher unions, and their relations. To place change in context and facilitate comparison over time, relevant historical highlights are interspersed with a presentation of reforms introduced since 1992 in two arenas: the industrial framework and education policy. In closing, consideration is given to participants' perceived influence of the state and teacher union relations on education reform, the impact of legislated changes on teacher unionism, and the appropriateness of the preliminary typology. Many participants were animated about the changes and volunteered opinions on the perceived merits, weaknesses, and impact of reforms as well as observations of events. Throughout, parallels are made with the preliminary typology of organized teachers and state relations.

Comparability

In a review of industrial relations reform, Phillips (1995) observes that Australia is a better comparator for analysis with Canada than the United States in spite of the proximity of the United States: Both Australia and Canada have emerged from histories as British colonies. Both have small populations concentrated in small geographic areas and large sparsely populated resource hinterlands. Both countries have significant indigenous populations, although this factor in the education sector is beyond the scope of the present study. Both countries rely on agriculture and natural resource exports. Among industrialized countries, both have achieved a middle-to-upper range standard of living.

Phillips (1995) observes both Australia and Canada share a commitment to equity, social justice, and plural consensus, while the United States is more oriented to business unionism and less favourable for the emergence of social-democratic or labour political parties. Australia employs centralized compulsory arbitration compared to the Canadian decentralized local bargaining that developed under the influence of United States' institutions. The Australian *Industrial Relations Reform Act 1993* established decentralized enterprise bargaining. Enterprise bargaining occurs with or, unlike Canada, without the role of the union.

Two factors differentiate the education sector. First, in Australia, Catholic schools receive federal government funding and limited state funding. Catholic schools are considered to be private, that is, non-government schools, along with Protestant and other independent schools that also charge tuition fees. In Canada, the *British North America Act 1867* assured minority religious education rights. Catholic or Protestant schools may be "separate" public schools. Such schools exist when a religious minority within the public school system decides to separate (Scharf & Langlois, 1994). Second, in Canada "lay control of education and structural separation from other local governance organizations have been two parameters underlying the design of school governance" (Langlois & Scharf, 1990, p. 40). In Australia, the states employ teachers and set

education policy with no intermediate lay governance structure such as boards of education (Appendix E).

Victoria, Historical Background

The following historical account draws on Keating (1998). Victoria has the smallest landmass of the continental Australian states and is the second most populous state. *Traditions in Victoria established a market form of regulation of education that reproduces class differentiation.* Populated more by white free settlers than convicts, Victoria's population boomed during the mid 1800s due to the gold rush. Victoria's affluent society and growing bourgeoisie paid the private school fees that were a barrier to working-class access to secondary education. Private schools, churches, conservative community groups, and conservative country members of the Victorian Parliament resisted state involvement in secondary education. The labour movement was indifferent to a broad secondary schooling, perceiving secondary education to serve the needs of the economy. The *Education Act 1910* introduced a state secondary school system supplementary to the existing private secondary schools. Due to the industrial base in Victoria, an emphasis on agricultural and technical schools, and an apprenticeship system slowed the development of a broad secondary education for all until the 1950s. The Department of Education (DEET, DOE) on behalf of the State of Victoria employed the teachers in all public schools until 1998.

Keating (1998) observes *Victorian education policy "at heart is class-based"* (p. 95). Participants note 33% of the student population is in private schools (Ministerial Council on Education, Employment, Training and Youth Affairs (MCEETYA), 1999; V11), the highest number of secondary pupils in private sectors among Australian states (MCEETYA, 1999; V40). Another observes private schools constitute 30% of Victorian schools, of which 21% are Catholic, and 9% are Protestant or other independent schools. The participant thinks debate in the 1990s is regarding the nature of education, the provision of mass public education compared to selective elite self-governing schools (DEET, 1999; VT28).

The framework for education change in Victoria is complex due to the intertwining of federal powers in industrial relations and federal influence in the education affairs of the states. Unlike Canada, where items not identified in the Canadian constitution default to the Federal Government, in the 1901 creation of the Commonwealth of Australia, the Commonwealth powers were enumerated (Phillips, 1995). First, the Commonwealth was given jurisdiction over industrial disputes that span state borders (V57, V40). The structure and mandate of the teacher unions is interwoven with developments in the state and federal industrial relations frameworks. Second, following World War II, the ability of the states to raise funds was limited when the Commonwealth retained the power to tax income acquired during the crisis. The Commonwealth Government receives revenue through income tax and conditionally gives grants to states to implement federal initiatives as set out in the *States Grants (Primary and Secondary Education Assistance) Act 1996* (Caldwell, 1998; Gaff, 1998; Spaul, 1999; VT89).

Political Parties

Unions created the *Labor Party* in 1891 (Gaff, 1998; V81, V86). The Australian form of the labour movement gives a strong role to the state in advancing working class and social justice causes (V81). Labor, rarely successful historically in Victoria, was in power from 1982-1992. Two participants think teacher unions played an active and significant role to bring Labor to power (Gaff, 1998; Nash & Spaul, 1986; V40, VT59).

Participants interchange Liberal and Conservative labels. The pre-1982 Liberal Government correlates to a peripheral state independent of society that maximizes the free market. Among the main principles of the *Liberal Party*, founded in 1944, are decentralization, individual choice, excellence, and economic growth through private enterprise (Gaff, 1998). The *Liberal Party and the National Party* that emphasizes social conservatism and rural life (Gaff, 1998) formed a *coalition* in 1990.

Participants agree *relations between organized teachers and the state changed dramatically in 1992* when the Coalition received an overwhelming mandate. Several participants perceive *Coalition reforms generally, including those in education, to be*

driven by an ideology of corporatization and privatization and accomplished by economic rationalism (Crooks, 1996; Gaff, 1998; VT02, V15, VT28, V40, VT59, V86, VT92). The Coalition perceives education as an individual rather than a societal investment, has a concern for standards, and shapes education on a basis of autonomy, choice, competition, and efficiency (Crooks, 1996).

On one hand, economic purposes appear to drive education reform as the Coalition carries on the Liberal traditions of a peripheral state that facilitates the operation of the market. On the other hand, the Coalition's use of rules and standards suggests a class state reflecting and reinforcing conservative values, social differentiation, and bureaucratic authority.

Education Unions

Teacher union membership is voluntary in Victoria. The state has *a history of union fragmentation* (Spaull & Hince, 1986). Until 1995, teachers dispersed their resources and energies among contending unions. The *Victoria Teachers' Union* (VTU), established in 1926, has its roots in the State School Teachers' Union of Victoria formed in 1886 by the amalgamation of existing unions (Spaull & Hince, 1986). In 1946, the secondary male teachers broke away to secure higher pay than that of the primary and female teachers. The men formed an association that soon admitted women secondary teachers and in 1949 became the *Victorian Secondary Teachers Association* (VSTA). In 1967 another split occurred when the *Technical Teachers' Union of Victoria* (TTUV) was created (VT02, VT28, V40).

In the early 1980s, the three unions formed a loose federation. However, in 1990, the VSTA operated independently, while the VTU and TTUV joined to form the *Federation of Teachers' Unions of Victoria* (FTUV). Participants note members and the election of the Coalition pressed for a unified voice for teachers (VT02, VT28, VT53, VT59, V81). In July 1995, the unions joined under the umbrella of the national union to form the *Australian Education Union Victorian Branch* (AEU Vic, the Union) (Spaull, 1999). The president is elected for a two-year renewable term. Participants remark on the

persistence of many tensions in the internal politics of the AEU Vic among the three union cultures (VT02, VT28, VT53, VT59, V81).

Three dilemmas common to teacher unionism illustrate the economic focus of the education unions in Victoria: *labour affiliation, 'industrial' action, and working conditions*. One participant observes labour affiliation creates divisions within the Victorian membership (V71). Teacher union affiliation with trade unions has always been contentious because it can imply class identification with workers, or it can be a pragmatic alliance to achieve goals (Spaull & Hince, 1986). During the period 1975 to 1980 the three unions affiliated with trade unions. This affiliation facilitated the teacher unions' support of the Labor Party in the 1982 state elections, an unprecedented public intervention in Australian electoral politics (Spaull & Hince, 1986).

Teacher unions were often the only permanent pressure group publicly critical of the education policy of the *centralized state education department* (Spaull & Hince, 1986). Different voices spoke on behalf of Victorian teachers over the years, notes one participant. This shaped different histories of activism (VT02). One person notes the VSTA adopted industrial militancy as a form of professional action (V81). Spaull and Hince (1986) perceive the gradual adoption by the VTU of "an *industrial and political militancy* similar to that of the VSTA and the TTUV [to be] one of the most significant changes in outlook of all the Australian unions" (p. 56).

In political campaigns, *the AEU Vic focuses on funding education and working conditions, arguments not restricted to teacher pay* (Keating, 1998; V25, V40, V57, V61, V71, VT92). One participant discerns a similar blurring of the political and industrial agenda and an intertwining of the professional and industrial in the achievement of agreements (V57). Two participants believe that governments perceive industrial conditions, not professional issues, as the teacher union responsibility (V57, VT92). Three participants observe teachers and teacher unions perceive learning and working conditions as two sides of the same coin (Senate, 1998; VT02, V40, VT92). Teachers' work has a relation to both the subject discipline and working conditions, but, in the opinion of one participant, the unions are too ready to sacrifice the first to *further industrial gain* (VT13).

Others recognize the AEU Vic is not strictly industrially based (V61). However, the participants see that the AEU Vic role in professional issues is diminished (VT13). Two interviewees see a greater need for professional voice and believe that unions would lose membership if they offered only industrial services (VT59, VT92). One participant observes the national union is active in education debates, but perceives the Victorian unions have lost any pretense of contributing to education (V81). A few participants describe the AEU Victorian Branch as *protectionist, tied to industrial unionism* (VT13, V71, V81) and almost suicidal in being industrial (VT59). One participant attributes the distraction of the unions from the education policy debate in Victoria in the late 1980s to internecine warfare (V81).

One individual perceives AEU Vic has a stronger relation with the federal AEU than most state teacher unions. The national forum is of increasing importance to address the state industrial strategies (VT02). First organized nationally in 1921, the Australian Teachers' Federation underwent a number of changes in name, composition, and mandate (Spaull, 1999). The existence of the national federation on the margin changed in 1983 when the High Court found that education workers could access the federal industrial system. Restructuring as a federal trade union in 1987 ensured teacher access to industrial rights and refocused and strengthened the voice of teachers on professional issues nationally. The name Australian Education Union (AEU) was adopted later (Spaull, 1999).

In summary, *internal divisions disperse the energy* and focus in the organization of teachers in Victoria. *Industrial issues receive greater attention* due to the national industrial relations framework, the need to recruit members, registration as and affiliation with trade unions, and the political climate in Victoria at the time of the present research.

Organized Teachers Relations with Political Parties in Power

One participant observes relations with government moved *from union control* in the 1980s *to union shut out* in the 1990s (V15). The following two sections describe the relations with the Labour Party, pre-1992, and with the Coalition, post-1992.

Relations with Labor

Participants note the unions had a cozy (VT02, VT59, VT85, VT92) and testy partnership with Labor (VT13, VT59, VT85). Participants observe the unions had personal contact with the Labor ministers of education (V11, VT13, V61, V71, V81, V86). Many ministers had an education background and an appreciation of school issues (VT02) and yet, note participants, a succession of ministers saw their predecessors taken down by the teacher unions (V71, V81). Some participants thought teacher unions virtually controlled the Labor Government agenda regarding schools and curriculum in terms of self-interest, not purely education interests (Caldwell & Hayward, 1998; V71, V86). Labor Premier Cain (1995) asserts, “We found ourselves locked into a number of industrial agreements that prescribed in great detail a vast array of teacher conditions and salary that bore little relation to education” (p. 277). Issues of financial management plagued the Labor Government late in the 1980s; participants remark that teacher unions contributed to the downfall of the Labor Party and that the unions needed to be more responsible in their demands (VT02, VT13, V15, VT59, V61). One participant places in context, the allegations that the teacher unions pushed the Labor Government to the brink. The participant thinks that teachers were more a thorn in the Government’s side than financially extravagant (VT92).

Relations with the Coalition

The Coalition received an overwhelming mandate in 1992 that led to an overnight transformation of relations with teacher unions (Caldwell & Hayward, 1998; Gaff, 1998; VT02, V15, V71, V86). One participant identifies the contributing factors as public

disenchantment with the former government, a landslide Coalition victory that decimated Labor leaving them without a power base and gave the Coalition control of both houses, and an electorate ready for the tough medicine (Caldwell & Hayward, 1998; V86).

Education Minister Hayward began change from day one and reforms were announced within a week (Caldwell & Hayward, 1998; V11, V15). Rapid change was important because, notes one participant, it limited the ability of bureaucrats to frustrate the process and got the momentum going before the Labor Opposition and other vested interest groups were able to regroup (V11). Hayward could not use the bureaucratic structure for change because he was dismantling the system and reducing bureaucrats' power (Caldwell, 1998; Caldwell & Hayward, 1998; V11, VT28, V71, V86). *Hayward perceives there was an industrial rather than a professional culture in education. Hayward sought to involve individual teachers directly so the reform program included changes to industrial relations* (Caldwell & Hayward, 1998).

Some participants indicate there was no teacher union support for the Hayward plan for education either before or after the election (V11, V57, V71). Several participants observe the Coalition deliberately excluded and marginalized the unions (V15, V25, V40, V61, VT63, VT85, V86). One of twelve reform strategies identified by the Secretary of the Department of Education, Geoff Spring (1997), states the intent: "to prevent control of the educational agenda and the operations of schools by special interest groups, especially trade unions" (p. 2). One participant observes *the Coalition makes a clear distinction between the industrial and the professional roles limiting its interaction with the AEU Vic to prescribed industrial obligations* (V57).

Three exclusionary tactics are of note. First, twelve participants identify a physical process that *denied the unions access to information and to negotiations* regarding curriculum and professional issues and at the same time *appealed to individual teachers* (McGimpsey as cited in Crooks, 1996). Second, two participants observe the Coalition changed the industrial relations system from a centralized system that empowers trade unions to one based on *individual contracts* (V40, V86). Third, seven participants observe the Coalition used a *divide and conquer approach* to play one group against another, undermining relations in education (McGimpsey as cited in Crooks, 1996; VT02, VT13, V15, VT32, V61, VT85, V86). Six participants remark the Coalition

deliberately *engaged school principals as their change agents* (Gaff, 1998; V11, V15, VT28, VT59, V71, V86). As one person notes, a powerful support base elsewhere neutralizes the opposition (V86).

School principals were vital to effect the reforms (Caldwell & Hayward, 1998). Participants reveal that an agreement was reached prior to the election with the school principals' association. There would be rewards and support in return for the school principal role *as agents of change for the Coalition* (VT59, V86). One participant notes the Coalition deliberately tapped into school principals who supported the Labor Party, knowing that if converted, they would be credible leadership models (V11). School principals, observe two participants, moved out of the teaching service and into individual performance-based contracts with inducements: an increase in pay and authority (V15, VT59). Only 200 of 2000 school principals did not sign individual contracts, two participants remark (V15, VT59).

Participant interpretations of the *Coalition motivation for change* vary. Reform was politically motivated (VT62) based on an ideology of corporatization and privatization (VT02, V15, VT28, V40, V86, VT92). The Coalition perceived vested interest groups, be it an ideological or materialistic agenda, had captured the education system (V11, V86). The Coalition considered unions to be irrelevant (V11, V57, V71). The Coalition was anti-union (V40, VT59, V86) or retaliating for union support of the previous government (V15, V25, VT32, V40). Former Minister Hayward speaks to reform objectives formed from personal experience and a belief that the interest groups that had captured the system were irrelevant (Caldwell & Hayward, 1998). Regardless of the rationale, *the Coalition power relation with the teacher unions and other vested interest groups was one of domination*, one of telling rather than consulting; one that, as one participant notes, stood firm to strikes (V11). *Teacher unions' influence on government was abruptly and strongly curtailed*.

One participant notes there was controversy among trade unions in Victoria on how to deal with the Coalition; some unions did deals, some engaged in traditional opposition tactics, some went halfway and tried to work with the Coalition to get the best out of it (V15). One participant describes how *teacher unions challenged the Coalition, took grievances to the federal industrial system, and encouraged teacher walkouts* when

the minister visited schools (VT02). There was *constant conflict* such that three individuals believe the unions placed an unhealthy emphasis on opposition tactics (V15, VT59, V61). Three others note an unproductive, entrenched hostility, resulting in routinely negative rather than thoughtful responses to Coalition announcements (VT13, V71, V86). Two participants note an absence of a collective voice for teachers, for egalitarianism, equity, and social justice issues (VT13, VT85). One participant identifies AEU Vic issues as the genuine concern regarding the *social justice dimensions and a loss of power*. The union movement and bureaucracy rely on centralized control, hence, the AEU Vic needs a different way of operating when decision making devolves (V86).

Some characterize the AEU Vic and the Coalition as having *no relations* (V25, VT62, V71). Others note the *industrial relations system shapes where the AEU Vic and the Coalition meet*, forcing the state to negotiate and conciliate (VT02, V57, V71, VT92). *The industrial basis for meeting appears to align with the proposed labour relations model; to have no relations introduces a new configuration to be examined further.*

The Legislative Framework

This section presents the legislative framework for teacher unions and state relations in education in Victoria and demonstrates the intertwining of the state and federal industrial relations systems. Participants observe that in response to union pressure the Liberal Government in the 1970s reduced class sizes, limited the face to face hours, and generally improved the teachers' workload (VT02, V71). Participants note this trend continued in the 1980s in negotiated agreements with Labor (VT02, V40). Others observe that under the Coalition the trend reversed in the 1990s (VT43, VT62, VT63).

Federal Legislation

Two participants identify the heart and soul of the industrial system in Australia as *conciliation and arbitration*, where both parties agree to obey the decisions of the Industrial Commission (VT28, V40). Collective bargaining is more sensitive to context such as use of sanctions and labour over supply, observes one participant. Government, as employer, has the resources and ability in collective bargaining to wield more naked power than in arbitration where, in theory, an issue is judged on its merit (V40). Two participants explain teachers are covered by a combination of Industrial Commission arbitrated awards, ministerial orders, and government-negotiated certified agreements. An award is a law setting the minimum standard for industrial issues: wages, classifications, and conditions of employment (J. Luebbers, personal communication, September 28, 1998). Conditions of employment include, for example, working hours, safety, and leaves. An agreement addresses other non-industrial matters, such as, resource allocation, and managerial responsibilities (V40, V57). A ministerial order gives force to a government offer, whether the offer is unilaterally declared or negotiated.

The Industrial Relations Act

Industrial relations address the interests of unions and employers in an industry. By means of a legal system, industrial relations regulate pay and employment conditions (J. Luebbers, personal communication, September 28, 1998).

In 1929, teachers in Tasmania and Victoria were denied access to the Australian Industrial Relations Commission (AIRC) (Spaull & Hince, 1986). The High Court found teachers were not part of an industry and were incapable of an industrial dispute within the meaning of *The Industrial Relations Act*.

In 1983, the High Court determined the status of education as an industry, overturned the 1929 ruling, and made federal industrial coverage under the AIRC possible for teachers and public servants (Spaull & Hince, 1986). The High Court upheld the change in 1995: “The federal Industrial Relations Commission has power to make awards binding the states and their agencies in relation to minimum wages and working

conditions . . . of a broad range of public servants and employees, including teachers” (Khan, Davison, & Travaglione, 1996, p. 463).

Workplace Relations Act 1996

The Industrial Relations Reform Act 1993 set the framework for industrial change in Australia. *The Workplace Relations Act* followed in 1996. *Both Acts reduce the role and power of the Industrial Relations Commission and unions.* The Commission power is confined to arbitrating safety-net awards. The 1996 Act restricts the conditions covered in an award and *favours enterprise bargaining* where management and workers, with or without union involvement, tailor agreements to meet the workplace or individual need (Caldwell, 1998; Spaul, 1999).

J. Luebbers (personal communication, September 28, 1998) expresses two concerns regarding the new system. The new system assumes “that individual employees have equal power to negotiate with an employer in the ‘market’” (p. 5). The new system treats industrial relations “in purely economic terms and ignores its social consequences” (p. 5). Gilson (as cited in Phillips, 1995) observes that without central regulation, enterprise collective bargaining does not offer protection against a decline in real wages, does not facilitate the organization of the non-unionized private sector, and erodes union collective power.

On the other hand, the new system offers flexibility to workplace managers. Caldwell (1998) reports:

A recent survey reveals employee concerns about escalating hours of work and proportion of jobs that are part-time and contract, but also declining union membership (see Hannan, 1997; Morehead et al. 1997). [Caldwell notes] these same conditions and paradoxes are evident in school education. [He observes] the context is generally freeing rather than constraining of self-management for schools. (p. 46)

To ensure social justice among schools, the teacher union in South Australia defined the enterprise as the education system. In Victoria, the *Coalition defined the school as the enterprise and sought contracts with individual teachers* (VT02, VT13, V57, V81).

State Legislation

Until 1983, teachers could only go to the *state industrial commission* to achieve awards to settle grievances in Victoria. Participants describe the Teachers' Tribunals established under the *Teaching Service Act 1946* as the forum for the government and unions to settle salaries and conditions (V57, V40). Labor abolished the Teachers' Tribunals and replaced them with a Victorian Teaching Service Conciliation and Arbitration Commission (*Teaching Service Act 1983*). One participant remarks the first decision, about which union represents the teachers, was contested by the three unions and tied the Teaching Service Commission in a process of appeals (Spaull & Hince, 1986; V57). In 1988, Labor moved teacher industrial relations into the mainstream of state industrial relations under the Employment Relations Commission with access to compulsory arbitration (Spaull, 1999).

During the 1980s, Labor held negotiations directly with the teachers' unions. As two participants note, this empowered the unions regarding terms and conditions of employment that previously were imposed unilaterally by the employer (V40, V81). One participant clarifies that the agreements with Labor covered all schools in the state but had no status as industrial relations agreements and required ministerial orders to give them effect. The same participant observes the unregistered agreements began as a three-page document signed in 1983, *Agreement between the Education Department and the three teacher unions*. By September 1992, the agreement became extremely prescriptive in a 1200 page document, *The consolidated agreement on conditions of employment in the government teaching service between the DSE and the FTUV and the VSTA* (V57). In contrast, in the 1990s, two participants note, there was *no formal agreement between the AEU Vic and the Coalition Government* (Senate, 1998; V15, V57).

On its election in October 1992, the Coalition immediately passed two acts that had been foreshadowed while the Coalition was in Opposition (Gaff, 1998): *The Employee Relations Act* and *The Public Sector Management Act*. The Coalition also changed the composition and mandate of school councils and adopted a regulation directing teacher public behaviour, *Teaching Service Order 140*. The latter two changes are discussed as policy issues.

The Employee Relations Act

The Employee Relations Act abolished the awards in the industrial system, moved to independent contracts, reduced employment security, and instituted penalties for industrial action. The latter were not enforced (VT02).

Individual contracts. The DOE offers unilateral over-award payments that bypass union negotiations, remarks J. Luebbers (personal communication, September 28, 1998). Teachers apply to individual schools for term-specific jobs. Transfers are achieved through application to a vacancy. Principals determine increments, promotions, allowances for extra duties, and performance bonuses based on annual performance reviews under the Professional Recognition Program (PRP). The PRP is discussed further as related to teacher appraisal.

Several participants believe the emphasis on *individual contracts endeavoured to remove the unions from the industrial relations equation* (V15, VT28, VT32, V40, VT63, V86). Participants remark that teacher unions, like most unions in Victoria, left the jurisdiction of the Employee Relations Commission and sought coverage under the AIRC, the federal industrial relations system (VT02, VT28, VT32, V40, V57, VT59, VT63). *To obtain federal coverage, the three teacher unions combined to form a branch of the Australian Education Union. The AEU had registered federally as a trade union in 1987 (Spaull, 1999). The AEU makes the industrial demand to the AIRC on behalf of state and territory unions. Three participants mention the Coalition opposed federal coverage for teachers on constitutional grounds and lost in the courts in 1995.* In the opinion of the three participants, this created a bit of a setback for the Coalition (V11, V40, V71). One participant explains the Government in Victoria ceded its industrial powers to the Commonwealth; *Victorian teachers now are covered and affected by changes in federal law along with teachers in the two territories* (V40). Because there is no state industrial relations system, no interstate component is required to file a grievance with the federal system (J. Luebbers, personal communication, September 28, 1998).

The Coalition determines the terms and conditions of teacher employment through a ministerial order or an individual offer. However, teachers are assured the federal award as the minimum condition of employment (Chadbourne & Ingvarson,

1998; VT28, V40, V57, V71). The AEU took the Coalition over-awards, that is, offers greater than the federal award, to the federal system as disputes. *The AEU Vic continues to ensure minimum standards by seeking the arbitration of awards within the federal industrial relations system.*

Term contracts. The Coalition Government recommended 30% staff on fixed term contracts as a planning tool to ensure a school never has excess teachers (Kronemann, 1998; VT28, V57, V95). In 1997, the fixed percent was deleted from handbooks and emphasis was placed on schools finding the right mix for their particular circumstance (V57). Fixed term contracts apply to beginning teachers not yet on permanent contract and to the school principal class (Kronemann, 1998; V40). Almost twelve per cent of teachers were on term contracts by 1997 (Kronemann, 1998; VT28). Term contracts offer increased staffing flexibility and pose less financial risk to school management. According to one participant, term contracts offer teachers flexibility, mobility, and more career opportunity, but ultimately it is a question of security, and ‘security and commitment go together’ (V94). One person perceives there is no longer a career in teaching due to the new culture of term employment (Kronemann, 1998; VT23).

In 1998, the Senate Employment, Education and Training References Committee (Senate Committee) conducted an inquiry into the status of the teaching profession in Australia. The Committee states, “Increasing reliance on casual teaching staff is detrimental to the interests of both teachers and students. Both suffer because they cannot establish the relationships on which good teaching and learning depend” (p. 124). The Senate Committee “regards the move to casualisation as a serious threat to teachers’ status and professionalism” (p. 126). According to participants, lack of job security creates a situation that forces repeated applications for a job, takes energy away from teachers’ work, dampens teacher commitment to their work and to building relationships, and shifts their focus to issues of financial security (VT62, V94). The AEU Vic relied on public information campaigns to pressure the Coalition for term contract policy changes.

The Public Sector Management Act

Two Coalition tactics enshrined in *The Public Sector Management Act* decimated the unions’ membership and resource base. Christmas Eve 1992, the Coalition stopped automatic deductions of union dues from teachers’ salaries under this Act. Several

participants indicate that this tactic caused a rapid shrinking of the unions' power and monetary base (VT02, V15, VT28, VT59, V86). Two participants note that in 1997, the membership of 7,000 represented 55% to 60% of potential and is high relative to other unions in Australia (V40, VT59). The teacher unions relied almost exclusively on membership dues and previously wouldn't be involved with anything commercial. The AEU Vic now gains revenue from using the building as the base for two mobile phone towers and for a locally made police drama (VT59).

During the 1980s teachers on permanent contracts replaced teachers on leave (for example: family leave of up to seven years) creating an ever expanding teaching force that three participants perceived to be a budgetary time bomb (V15, V57, V71). *The Public Sector Management Act* gave state department-heads power to dismiss employees without compensation. The teacher unions applied for a redundancy award as protection. One participant indicates an interim award was granted Christmas Eve 1992 that forced downsizing by a voluntary redundancy process (VT02). *V0094—Victorian Teachers Redundancy Award 1994* speaks to the “consultation, identification and redeployment of excess teachers” (Caldwell, 1998, p. 30). One participant notes that in 1997 there were 250 excess teachers to place across the state, compared to 4,000 excess teachers in 1995 (V57).

The mandatory federal industrial relations process frames the AEU Vic relations with the state. The Coalition defined the school as the enterprise and introduced individual and term contracts. Individualization and lack of permanency are strategies consistent with regulation by market philosophy. The promotion of meritocracy, and the emphasis on efficiency and competition, are characteristic of a peripheral state. Individual teacher's acceptance of state over-award offers differs from the preliminary typology. The typology proposed that negotiation would characterize union action.

Education Reform

The previous section considered reforms that impact on employment conditions and teacher unionism. As one participant remarks, teacher unions could not achieve all things that could improve the status of teaching through industrial means, so a political

forum was needed (V40). Education policy is another arena where teacher unions and states have interests. Participants observe that education reform in Victoria is ongoing (VT13, VT89). *Educational knowledge, governance, and accountability* are policy areas that experienced change in the 1990s. Federal initiatives, state political parties' ideology, and policy setting processes shape education reforms.

Federal Influence

Federal government initiatives, observe three participants, strongly influenced Victorian education policy since the 1970s (V61, VT89, VT92). Varying tactics influenced state policy toward a national education system: a leading Commonwealth role, more collaboration between the states or territories and federal government, and financial inducements (Martin, 1996). According to two participants, Labor invited participation in the 1970s and fostered a national interest in schools and an optimism about the role of education in the future of Australia (V61, VT92). One participant notes Labor undertook university and school reform in the 1980s and brought together teacher union and state education leaders in the National Project on the Quality of Teaching and Learning (Martin, 1996; VT92). Under Labor, Australia set national school goals, national profiles guiding student evaluation, a national equity in schooling strategy, and formed a jointly owned Curriculum Corporation (Martin, 1996). One person describes how Conservatives, elected in 1996, rolled equity issues into literacy, established national benchmarks in reading and in literacy, and sought a link between national testing and funding (VT89). Participants note that Labor and Conservative federal governments required states to implement specific federal initiatives to receive funding (V61, VT89).

Two participants indicate the funding structure for state and Commonwealth aide to non-government schools is a significant issue in Victoria (V71, V86). The Karmel Report 1972 (The Interim Committee of the Australian Schools Commission: Schools in Australia. AGPS, 1972) articulates the *values on which federal education funding would rest*. One participant identifies these values as *parental choice of schooling and the maintenance of a dual system of private and public education* (V86). The proposal to fund non-government schools survived a High Court challenge in the 1970s. According

to two participants, the decision resolved issues of funding non-government schools (V71, V86). However, one person believes tensions over the use of public funds continue to exist (V71). *The federal framework promotes choice in and privatization of education within a curriculum and standards framework tied to conditional federal funding.*

Educational Knowledge

Regarding the review of the teaching profession in Australia, “a common theme in evidence to the [Senate] Committee was teachers’ lack of influence over curriculum, training and professional development. This undermined their professionalism” (Senate, 1998, p. 26). This section identifies the education goals and describes the processes to determine goals, policy, and curriculum.

Education Goals

Nine participants perceive Labor reform processes to be guided throughout the 1980s by party policy valuing equity, democracy, and community; by national education policy; and by consultations with parent and teacher organizations (Cain, 1995; Gaff, 1998). *The Coalition objectives and action plans for dramatic education reform were set while in Opposition* (Caldwell & Hayward, 1998; Gaff, 1998; V11, V71). One participant states that Coalition ideas for reform were picked up from worldwide trends and pushed ahead (V11). Some participants observe that Education Minister Hayward provided strong management, had a plan to organize schools to focus on the students rather than the system and those in it, and had a determination to implement reforms (Caldwell, 1998; Caldwell & Hayward, 1998; V11, V57, V71, V86). The DOE Secretary, Geoff Spring (1997), identifies the objective of Coalition reforms as follows:

The pursuit of excellence by every student so that each has the best chance to reach his or her full potential and is best equipped to make a valuable contribution to the development of the Australian economy and society – in a competitive environment where the achievement of parity with world’s best practice in education has been seen as essential to Australia’s economic survival. (p. 1)

The above goal statement viewed in terms of the preliminary typology of organized teachers and state relations emphasizes student excellence primarily for economic purposes in a competitive environment. The Coalition goal is characteristic of neoliberal philosophy in contrast to Labor values that exemplify a social democrat aligned ideology.

Education Policy Setting

Differences exist in the policy setting process in Victoria between the 1980s and 1990s. Gaff (1998) concludes that “the differences in policy style between Labor and Coalition Governments was largely due to different *styles of ‘consultation’*” (p. 105). Gaff finds that Labor elicited opinions from the community; the Coalition provided information about decisions to the community. Labor fostered participation of parents, school principals, and teachers in the direction of education and engaged organizations in the education community in meaningful consultation (Cain, 1995; Crooks, 1996, Gaff, 1998). This involvement was nurtured, in the opinion of two participants, in the belief that local communities and teachers responsible for problem solving will better own the solution (V61, VT92). Several participants note that Labor engaged in change by negotiated industrial agreements. Labor also introduced significant education reforms in consultation with the teacher unions on a range of policy issues: curriculum change, state board of education, and the Victorian Certificate of Education (VCE) (Gaff, 1998; VT02, VT13, V15, V40, V57, V81).

The Coalition, in contrast, shut out the unions. Rather than representatives selected by their organization, the Coalition *appointed chosen individuals* to committees based on individual “expertise or known position on a particular issue” (Gaff, 1998, p. 106; VT13, V15). The Coalition *restrained teacher debate: Teaching Service Order 140 1993*, contained in the *Teaching Service Act*, prohibited teachers from speaking out regarding problems in the education system. Order 140 limited teacher engagement in intellectual discourse or public debate about the Coalition education policy (Crooks, 1996, Gaff, 1998; Graham, 1997; Senate, 1998; V15, VT23, V61, VT85, VT92). One individual indicates the Coalition reduced the powers of the Auditor-General, cut tribunals regarding appeals, and generally curtailed people’s rights in Victoria (V15).

Limiting individual rights runs counter to the state operating at the periphery in a free enterprise fashion. The control exercised in participation by invitation and Order 140 is characteristic of a class state use of rules, standards, and supervision.

Curriculum

Two participants note that during the 1960s' liberalism, Victoria secondary schools developed their own curriculum (V15, V81). In the 1980s, one participant remarks, the Commonwealth Labor Government moved against liberalism by adopting *national education policy* (V81). One participant observes the opportunity for input into curriculum at the state or national level through state invitation or teacher union initiative, gave rise to variations in teacher union influence among the states (VT89). *Labor supported the national curriculum and assessment and invited teacher union participation in curriculum and student-evaluation reform* (VT02, VT13, V61, V81). The Coalition introduced a *Curriculum and Standards Framework* set by the Board of Studies *that continued the implementation of the national education agenda but excluded union participation in the process* (V11, V86, VT92). The curriculum consists of *ten key competencies common to eight key subject areas* (MCEETYA, 1998; VT89). The Curriculum and Standards Framework specifies learning outcomes, support materials, and assessment materials, and provides consistency for the transition from primary to secondary and for student mobility (V11, VT85). Three participants perceive curriculum as the key to change in Victoria (V11, V71, V81).

There is *mixed reaction* to the Curriculum and Standards Framework. One participant believes the CSF is designed to ensure accountability, but gives schools and teachers the opportunity to use their creativity in the way they deliver the curriculum (V11). Two participants observe the CSF prescribed the curriculum more tightly and at the same time offered a sensible and authentic assessment base for mapping student progress (V81, VT92). Some participants think most teachers perceive the CSF as conceptually good (VT62, VT85, V95), but the number of courses, course advice, paper work, and indicators overwhelms teachers (Graham, 1997; V25, VT73, VT85, VT92, V95). Some participants perceive the CSF focuses on content and outcomes, narrows the

curriculum, and places emphasis on accountability to the system and imposed standards rather than accountability to students and parents (VT13, V40, VT43, VT85, VT92).

Caldwell (1998) reports that *no publicly funded Australian schools are independent. Schools must work within a national curriculum framework. Caldwell perceives curriculum and standards frameworks are a constraint on self-management and may impair achievement in literacy. Caldwell advocates revisions to the Victorian framework or its interpretation to achieve truly autonomous schools. A peripheral state would support such revisions. A class state imposes standards as a mode of regulation.*

Governance

Responsibility for school governance resides at two levels in Victoria: the state (DOE) and the school. The decentralization of powers for school operation and budgets focus the discussion on school governance.

Decentralization

Labor established the Local Administration Committee (LAC) with school principals and teacher union representatives making decisions regarding school operation (VT02, V57, VT59, V95). Participants remark that the degree of union influence within the LAC frustrated some school principals (Caldwell & Hayward, 1998; Gaff, 1998; VT02, V15). The Labor Education Minister, Ian Cathie, proposed further devolution in the mid 1980s, but was opposed by parents, teachers, some bureaucrats, and the Labor Cabinet (Caldwell, 1998). Interviewees note the Coalition built on Cathie's defeated proposal (V61, V81, V86). One participant notes the Coalition committed to remove layers of bureaucracy and to focus resources at the school level (V71). The Coalition objective, according to two participants, was to *disband the education system and permit local school autonomy through control of the budget within an accountability framework* (V11, V71).

The Coalition implemented decentralization in *two phases. Phase one, Schools of the Future, empowered school principals and School Councils to make previously centrally determined managerial decisions.* Participants note government is still the

employer of a statewide teaching service but jobs and contracts are localized (VT43, V57). Participants remark that the Coalition removed union representatives from and reduced the number of teachers on the former LAC and added parents to create School Councils. Participants observe the amendment caused a rapid change in power relations within schools, *disempowering teachers and teacher unions and empowering school principals* (V15, V86). However, school principals are disillusioned, according to some participants (V15, V25, VT85). Participants observe that everything that was administered statewide is now processed at each school (V15, V25, VT85, VT92). In the opinion of two participants, school principals must focus on management, the dollar, and efficiencies, rather than kids and education (Crooks, 1996; “In conversation”, 1999; V15, V25). A five year cooperative study of school principals (Education Victoria, 1998) finds principals expect heavy workloads, have declining confidence in the attainment of objectives and job satisfaction, but overall, prefer the Schools of the Future arrangement to previous structures.

Phase two, Schools of the Third Millennium, empowered School Councils to take over the management and some funding in self-governing schools. School Councils also become the employer of teachers. One individual notes there is no minimum award covering such school employees and no employment or income security (VT28). One participant notes that no parent vote, only a simple majority of the School Council is required to become a Third Millennium School (V40). The participant summarizes the change: *Phase one corporatizes and phase two privatizes public education* (V40). Both phases encompass administrative rather than political decentralization because the minister of education retains the capacity to alter the arrangements, and the Commonwealth requires accountability for grants (Caldwell, 1998). One participant observes teachers and principals manage small irrelevant initiatives and the political system does the big thinking regarding curriculum and professional development (VT92).

Parent and community responsibility to self-govern schools fosters privatization. The move to dissolve the education system in favour of privatization is consistent with the role of a peripheral state that facilitates the free market.

Funding

Two participants note that the Coalition implemented reforms in tandem with budget cuts and a reduction of services (Crooks, 1996; V40, V71). Several participants perceive that the Coalition caused Victoria to fall from the third best to the lowest funded education system in Australia (Gaff, 1998; Kronemann, 1998; VT02, V25, VT32, VT53, VT85, VT92). In an audit of the education system published in 1993, Crooks and Webber (as cited in Kronemann, 1998) determined that the newly elected Coalition Government used the perception of a crisis to justify its actions. One participant believes the budget crisis was an advantage in the implementation of education reforms for two reasons: People perceived the need for change and were more accepting of changes. Unions and interest groups focused on the budget cuts and lost sight of the major structural reform (V11). Furthermore, one participant notices that the marginalization of the unions meant there was no effective voice to protect or improve funding for public education (VT85).

Budget cuts removed 8,000 of a 40,000 teaching force by adjusting the student to teacher ratio and closing over 300 of just under 2000 schools (Crooks, 1996; Kronemann, 1998; VT02, V15, V25, VT32, V61, VT62, VT92). The Coalition also contracted out school cleaning and reduced the DOE bureaucracy (Caldwell & Hayward, 1998; Crooks, 1996; V11, V71, VT85). Kronemann (1998) finds

Cuts to the number and ratio of teaching staff have had severe and wide-reaching affects on class sizes, on programs, on schools' capacity to meet special needs, on teacher workload. At the same time schools have had to deal with massive workload increases for non-teaching staff and principals as a result of the devolution of administrative and other tasks, and reductions in the level of system support available to schools. (p. 18)

Participants remark that *the state passed off the impact of budget cuts as a local choice, rather than the state's responsibility* (Crooks, 1996; Senate, 1998; VT02, VT23, V25, V40, VT85, V95).

In the Schools of the Future, the Coalition introduced school global budgets with funds based 90% on enrollment and 10% on student profile (Caldwell & Hayward, 1998; V11). One person perceives the formula was about individualizing, rather than equalizing outcomes (V61). Participants note the formula did not permit schools that start behind to catch up (VT59, VT92). The formula also diverted funds and time to promotional efforts

in the competition for students (VT13, VT23), disadvantaged small schools (V15, V25), and created a budget-driven approach to staffing and resources (V15, V25, VT28, VT53, VT63).

Caldwell and Hayward (1998) suggest that public education requires some private contribution not just exclusive reliance on public funding. In 1998-1999, the State of Victoria provided \$5,640AU per student towards operating costs and reports an average pupil teacher ratio of 14.9 (MCEETYA, 1999). According to participants, Schools of the Future rely on locally raised funds for almost 10% of the core costs and to supplement school activities (Crooks, 1996; Senate, 1998, p. 86: 5-7% recurrent costs; VT02, V40, VT73, VT85). In 2000, the Victorian Government funded 93% of government school and 18% of Catholic school costs (“Funding for Catholic schools”, 2001, p. 4). Several participants hold the opinion that reliance on local funding strained family relations with the school, did not address social justice issues, made schools competitive, exacerbated existing differences, and led to a growing divide of well-resourced and residual schools in the state system (VT02, V15, VT53, V61, VT85, VT92). Crooks (1996) identifies the “lack of concern and inability to deal with inequality and injustice” (p. 35) as one of three fundamental flaws in the Coalition public policy. One person observes *differentiated schooling is part of Victoria’s history* (V81).

The priorities of a peripheral state explain economic influences on education goals and increased autonomy in school operations. The establishment of self-governed schools is consistent with regulation by market, as is the financial support for non-government schools. Local responsibility for budgets, per capita financing, and increasing local responsibility for funding emphasize market regulation and meritocracy.

Accountability

One participant thinks the emphasis in the Coalition reform on accountability was due to the decentralization of power (V57). Another person notes that education became a political problem in the general search for greater accountability during the 1990s (V71). A third participant perceives a change in the language in schools where teachers ‘work’ more ‘productively’ and parents and students are ‘clients’ instead of ‘citizens’.

The participant believes there is a change in the school ethos: How students are perceived is based on judgment rather than potential (VT13). The Coalition *took control of teacher certification, introduced programs to evaluate schools and teachers, and expanded student assessment*. The Ministerial Council on Education, Employment, Training and Youth Affairs (MCEETYA) continues to publish the states' annual reports to the Commonwealth.

Teacher Certification and Conduct

Three participants speak of the Victoria Secondary Teachers Association control-of-entry campaign in the early 1970s in a fight for minimum teacher qualifications and a registration process (VT02, VT59, VT92). Two recall the Liberal Government established a Teachers' Registration Board in 1973 comprised of elected teacher union, school principal, and government representatives. Registration required four years training for secondary and three or four years training for primary teaching (VT02, VT59). Four participants note the first act of the Coalition was to abolish the Teachers' Registration Board (VT02, VT59, VT92, V95). The DOE determines the eligibility of teachers for employment in government schools and the Registered Schools Board registers teachers employed in non-government schools (Caldwell, 1998; V95).

Participants note that the Coalition created the *Standards Council of the Teaching Profession of Victoria (Standards Council)*, an advisory structure without democratic representation (VT02, VT59, VT92) that is statutorily independent of the government (V71). One participant notes the Standards Council membership and mandate: There are representatives from both private and state teachers and employers and a representative of teacher training institutes; the AEU Vic is not represented. The Standards Council created professional standards and a code of ethics for teachers, and gives advice to the minister of education on teacher professional issues (V57). Discipline procedures described by one participant are handled entirely by the DOE until the appeal stage in a system of allegations, responses in writing, investigation, charges, and hearing (VT59).

One participant believes the standards movement arises from a genuine need for the profession itself to define the work of teaching (Ingvarson, 1997). However, the same

participant finds that *imposed standards are a managerial and narrow definition of teaching* (VT92).

The concept of a class state explains the Coalition taking total control of teacher certification. The Coalition places emphasis on the individual teacher but within a prescribed appraisal structure based on standards imposed on the profession. The presence on the Standards Council of select individuals, compared to representatives of a collective teacher voice, demonstrates authoritarian control. A peripheral state strategy would more likely deregulate the teaching profession.

Teacher Appraisal

During the 1970s, the unions struggled for local control and teacher autonomy in Victoria. One participant recounts how teachers left the DOE inspector with the students, thus undermining the purpose of the visit. Inspection dwindled (Spaull & Hince, 1986; V25). The Commonwealth Labor Government introduced the Advanced Skills Teacher (AST) in the late 1980s as part of a national campaign to address teacher careers. AST Level 1 became an automatic step on the salary scale, defeating its purpose, note two individuals (V71, VT92).

The Coalition linked performance to salary. In 1995, the Coalition offered a Professional Recognition Program (PRP) to teachers in leadership roles as an over-award. *The purpose of the PRP was “to link remuneration, teacher selection and promotion to performance . . .”* (Spring, 1997, p. 2). One participant observes that performance-based pay places the Government of Victoria on a *business footing, whereby pay is higher, but reduced job permanency protects the financial safety of the state* (V57). The PRP, beginning July 1995, required voluntary teacher commitment to change to an annual review and to performance-based payment (Chadbourne & Ingvarson, 1998; V57, V71, V86). In March 1996, the Industrial Relations Commission placed the PRP within the federal award creating a form of workplace agreement covering all teachers. Three participants note that teachers on the incremental scale, who previously received automatic increments, also encountered change. Under the Coalition program, teachers receive the next increment only if they satisfy professional standards as annually assessed

by their school principal (V15, V57, VT85). *Principals assess teachers against standards set by the state-appointed Standards Council (V15, VT85).*

Teachers and their union opposed the Professional Recognition Program. Several participants note school strength is a result of everyone working together. These participants see pay as a powerful incentive that is neither democratic nor collaborative. They perceive that a performance-based approach ignores the human relations underpinning teaching and learning and is divisive among staff. These participants believe the effects outweigh the professional benefits in the program (Reid, 1999; VT23, V25, VT43, VT53, VT85, VT92, V95). Chadbourne and Ingvarson (1998) similarly determine the “PRP forces a sharp divide between teachers and managers. It does not reinforce the notion that . . . all teachers are expected to contribute to professional leadership” (p. 89). The co-authors find teachers believe the PRP has “added to their workload and forced them to give less attention to their core work of teaching” (p. 88).

The increased supervision for performance-based pay guided by imposed standards suggests regulation by authority. The exchange of performance for pay exemplifies regulation by market.

Student Evaluation

Several participants note teachers strongly supported the Victorian Certificate of Education (VCE). The VCE is an end-of-schooling credential instituted under the Labor Government in the 1980s that had improved student access and success. The aim of the VCE was a broad-based, comprehensive, and general focus, rather than the previous narrow focus serving university needs (VT02, VT13, VT43, V61, VT85, V86, VT89, VT92).

Participants note the Coalition revamped the VCE and put in place the Learning Assessment Project (LAP), with standardized testing for years (grades) three and five (Spring, 1997; V11, V71, V86). Schools receive a report on student achievement and a comparison to like schools. Parents receive the child’s placement on a graph of student achievement (VT43, V71, VT89). One person sees the LAP as *inevitable due to the national framework* (V71). Some participants observe that standardized testing: values limited types of intelligence, does not assess enough, is not continuous or diagnostic,

leads to narrowing the curriculum, and is a dangerous definer of students and of teaching practice (VT13, VT43, VT85). One participant indicates there are better uses for resources (VT13). Uses of test data for such purposes as marketing schools, assigning subject status, and meeting political needs, raises ethical issues for another participant (VT89).

The Coalition attached accountability procedures to school operations, teacher appraisal, and student evaluation. Market regulation uses the technologies of efficiency and competition. Class state regulation by authority employs rules, standards, and supervision. Authority explains the controlled writing of Charters, teacher supervision guided by imposed standards, and centralized standards for student evaluation. Market regulation explains the focus on local management, efficiency, flexibility, and performance. The federal framework encourages market regulation within guidelines.

Conclusion

Concluding remarks consider the perceived influence of organized teachers and the state relations on education reform and the impact of legislated changes on teacher unionism. The appropriateness of the preliminary typology to explain the relations is discussed.

Perceived Influence of Relations on Education Reform

Until the 1980s, achieving union-desired change was onerous, thinks one participant, because there was no true industrial relations system, just a process of government policy adoption (VT59). Labor recognized education organizations as part of the policy process and created strong education community links. In contrast, the Coalition excluded the teacher unions from the change process and involved only selected individual teachers and school principals. With Labor, teacher unions had influence on curriculum, student evaluation, and teaching conditions. One participant perceives *the teacher unions pushed the boundaries of the relations with Labor rather than sharing power responsibly* (VT59). Another participant perceives *it is the role of unions to demand and the role of the state to manage the demands* (VT02).

Caldwell and Hayward (1998) identify three problems regarding the teacher union role with respect to education reform in Victoria: The first difficulty is *the union officials' focus on industrial representation* that, in their opinion, does not necessarily reflect teacher professional interests. The second problem relates to collective representation. *Individual interests are subjugated to the group, in contrast to professionals in general who individually accept frequently onerous personal responsibility.* The third problem is the *blurring of union roles regarding professional issues, economic affairs, and consciousness-raising on specific issues.* The use of collective and industrial action, the co-authors believe, has undermined the concept of teaching as a profession.

Caldwell and Hayward (1998) view proposes a singular purpose for organizing teachers: to address professional interests. However, two participants find the professional organizations were ineffective in addressing changes because they depended on government funding to exist and could not be openly hostile to the Coalition (VT02, VT13). Two participants perceive the only strong voice on behalf of the profession, in the broader policy climate, is the AEU Vic which was marginalized. The two participants identify the genesis of the broader policy climate as the reforms in the UK and US (VT02, V86). Participants observe that in the political context created by the Coalition, there is little acceptance of delegated representation and the collective voice as the way people protect their own interests (VT02, VT13, V15, VT92).

One participant believes that unions are only as powerful as government lets them be (V11). The Coalition strategy to avoid talking to the teacher unions, observe two participants, did limit the unions' possible responses and influence (VT23, VT85). Some participants note the AEU Vic did not have an impact regarding the Coalition education reform agenda (VT02, V15, V40, V71). Some participants observe the industrial impact: the three unions formed the Australian Education Union Victoria Branch to access the federal industrial relations system (VT02, VT59, V71). Two participants note industrial conditions did not constrain Coalition education reforms (V11, VT92).

Caldwell and Hayward (1998) perceive "the power of the teacher union officials derives from their ability to create a collective industrial dispute" (p. 169). One participant observes that the teacher unions had two avenues for influence: the industrial

relations framework and pre-election lobbying (VT92). In the opinion of another participant, *the deregulation of the industrial system pushed the AEU Vic back to political strategies*. The participant observes the teacher unions initially thought the federal award was enough protection but the AEU Vic leadership *changed tactics* in the late 1990s. *The AEU Vic developed teacher activism and relied on local community, rather than statewide, politics*. The AEU Vic class-size campaign achieved a Coalition commitment to address the teacher shortage, thus improving both education and working conditions (V40). Participants observe increasing Coalition sensitivity to avoid public problems or issues. The DOE changed the handling of issues that the AEU Vic made sensitive, such as the treatment of term-contract teachers (VT02, V57). Labor² formed a minority government in November 1999, placing in question the future of Coalition reforms.

Caldwell and Hayward (1998) say the success of the Coalition reforms depends upon teachers teaching differently. Some participants identify effects of the strained relations on the targeted education reforms. One participant notes some brilliant but isolated program initiatives (Caldwell & Hayward, 1998; VT92). Another observes the marginalization of the AEU Vic had an impact on teacher morale (VT85). Participants not only describe the changes; they question the quality and educational value of policies and volunteer opinions on the perceived merits, weaknesses, and impact of reforms. Six years after the Coalition was first elected, emotions are still highly engaged for many participants in the present research. Two participants believe teachers feel they are victims of change and see things done to them (VT02, V86). One participant believes reforms were badly implemented and were passively and actively resisted by teachers and schools (VT85). One participant observes teacher commitment is difficult to achieve without harmony and a level of partnership and compromise that make teaching possible (VT92). Caldwell (1998), looking more broadly at Australian education reforms, notes lack of trust among key interests as a constraint on self-managing schools. The lack of trust is particularly evident when the creation of more autonomous schools is

² Labor was elected on a four-pillar policy program: -- responsible fiscal management, promoting growth across the state, delivering improved services and restoring democracy (DEET, 1999, p. 3). *The Education*

accompanied by fiscal restraint. Caldwell concludes that rebuilding trust is essential to achieve lasting reforms. Fukuyama (1995) observes “there is usually an inverse relationship between rules and trust, the more people depend on rules to regulate their interactions, the less they trust each other, and vice versa” (p. 224).

Impact of Legislated Change on Teacher Unionism

Commonwealth taxation powers, a national education policy for curriculum and assessment, and conditional grants influence state education policies. The Commonwealth industrial relations legislation weakens the role of the Industrial Relations Commission and unions and facilitates enterprise agreements. Lipsig-Mummé (1999) observes “the Australian industrial tribunal model has been virtually destroyed . . . by the introduction of an American-style right-wing labour relations policy” (p. 8). Australian education unions, in the dependence on the automatic nature of the awards, have discovered they have become “too distant from the urgencies of their members” (p. 8). *Australian industrial and educational policies favour market regulation in education.*

Under the Labor Government, Victoria saw the adoption of national education policies and the inclusion of the teacher unions and the community in education policy-setting processes. However, several factors contributed to an abrupt change in organized teachers and state relations in 1992. The teacher unions (a) had supported Labor election-campaigns during the 1980s and (b) continuously pressed Labor for more demands without regard for the changed economic context. The union prioritized its relations with its members because fragmented teacher unionism depends upon voluntary membership. The Coalition (a) perceived the teacher unions to exert excess control on Labor education policies, (b) held the belief that unions have no role in determining policy, (c) abolished the state industrial relations system, and (d) emphasized the market regulation of education. Victoria has a history of political liberalism and private schooling that is open to market regulation. The historical attitude contributed to the Coalition’s strong mandate.

Act amended March 2000 repealed the legislation enabling self-governing schools; the Department employs teachers and School Councils employ casual teachers (V57).

The *Coalition dominated the relations* with the AEU Vic in the 1990s. The Coalition significantly limited the collective teacher voice in Victoria. School principals, parents, and teachers not representative of the AEU Vic were assigned responsibility for 80% of the education budget in the operation of schools. Individual and short-term teaching contracts both provided school flexibility in staffing and undermined the role of the AEU Vic. Participants observe *individual contracts and enterprise bargaining take away from centralized union power* (VT13, V40, V86). Reid (1999) notes that “as the identity of teachers shifts from one of common membership in a profession to that of individuals operating in an education market, so too do the prospects for solidarity and collective action decline” (p. 14). The *AEU Vic influence on education reform was limited* to individual teacher interventions, resolution of grievances arbitrated in the federal industrial relations system, and issue-specific results arising from community information campaigns. In industry, Voos (1997) observes participatory forms of work organization shape the nature of collective bargaining with consequences for unionism in a *shift from ‘insurance unionism’ to a ‘mobilization of membership’*. Rather than extinguishing the voice of organized teachers’, Coalition strategies gave purpose and legitimacy to the AEU Vic search for new avenues of influence.

How members respond to organized teachers’ loss of influence on education policy is a critical issue for the teacher unions. Two avenues are apparent: *Will the evolution of teacher unionism in Britain prevail, or, will new forms of teacher professionalism and unionism emerge*, as proposed by Kerchner et al.? In 1985, Lawn suggested the likely consequence of direct control in the Britain is a more radical better-organized union. In 1996, Lawn reported obliteration of the union’s national role and observed its members became consumers looking to unions for new services, such as insurance and car loans. For Victoria, Caldwell and Hayward (1998) advocate individual teacher contracts with schools and teacher association with a professional organization that promotes professional development, rather than participation in a trade union.

The AEU Vic engaged only in *grievance arbitration*. The AEU Vic did not proactively negotiate collective agreements, advocate for social change, nor seek to enhance professional responsibilities. The AEU Vic sought third party intervention in relations with the state. AEU Vic applied to the federal industrial relations system for

dispute resolution and mobilized its membership in community information campaigns on specific issues, such as, class size and term contracts. The AEU Vic also entered into commercial fund raising ventures to support organizational financial stability.

The experience of market regulation in Victoria, where the state met only federally imposed legal obligations, suggests there would be no formalized state relations with organized teachers in a free market. The union role would become one of survival rather than renewal and would be reduced to protective, supportive, and insurance functions on behalf of individual members and the organization. The focus of organized teachers and state relations would be related to the exchange of teacher labour, rather than social change or professional issues.

A change in the political party in power creates the opportunity to retool organized teachers and state relations in Victoria. The minority status of the Labor Government means instability regarding relations in education for the near future.

Labour Relations

The experience in Victoria is mixed. The state uses a combination of the market and authority to regulate education. The intent in selecting Victoria as a case was to examine relations of organized teachers with a state that uses market regulation. The following discussion extrapolates from the history of liberalism and the market-regulated experiences in Victoria to assess the preliminary model of labour relations.

With one significant exception, the characteristics of labour relations proposed in the preliminary typology can reasonably be anticipated under market regulation. A peripheral state facilitates the free market. The pre-1980s experience of liberalism in Victoria suggests that under market regulation, teachers as specialists and decentralized curriculum decisions are plausible forms, respectively, of professional and educational knowledge. There is an economic rationalization of political action, demonstrated in the focus on the teacher's worker role, rather than the advocate or professional role. However, organized teachers' use of *collective bargaining* as the primary means to influence a state using market regulation is brought into question in several ways.

First, organized teachers in Victoria rely on arbitration, rather than negotiations, to determine the conditions of employment. In part, this is due to the Australian industrial relations framework. In part, it is due to organized teachers and state relations, as exemplified by the change in practice under the Labor Government. Fukuyama (1995) remarks that to make negotiations work, both parties must *trust*³ the intentions and the willingness of each other. There is no trust between the Coalition and the AEU Vic.

Second, the Coalition abolished the state industrial relations system. The Coalition introduced incentives, in the form of over-awards, that teachers could opt to receive in exchange for specified employment conditions. The conditions required teachers to accept annual appraisals and performance-based pay. The Coalition over-awards invited teachers to act independently, rather than adhere to the collectively determined conditions of employment. The Coalition bypassed the teacher unions, and

³ Fukuyama (1995) also suggests that "modern institutions are a necessary but not a sufficient condition for modern prosperity and the social well-being that it undergirds; they have to be combined with certain

the Award covering teachers collectively, to initiate individual contracts with teachers. There was no collective bargaining, nor any negotiation. There was an exchange when teachers chose to accept the incentive offered. The market as a mode of regulation emphasizes individuals as entrepreneurs and has no role for the union. This finding replicates the loss of teacher collective bargaining in Briatin and the experience in industry (Table I, page 19).

Third, in reaction to the loss of an industrial relations system and the introduction of individual contracts, the unions amalgamated to form a branch of the Australian Education Union. Through the AEU, organized teachers in Victoria could access federal industrial law. The AEU Vic grievance to the federal industrial system achieved an award specifying the minimum a teacher would receive. The minimum included the over-award provisions. In this way, the teacher union *protects* teacher interests generally, rather than proactively negotiating employment conditions.

AEU Vic had no influence on education reforms. Organized teachers and state relations in Victoria were limited to labour-related issues. Relations were enforced rather than voluntary. Federal law shaped the forum where the state and the teacher union met. Public opinion influenced the state responsiveness to issues raised by the teacher union.

In summary, the roles of the state and organized teachers would be marginal regarding the reform of education in a free market. Rather, specialization, choice, and competition would shape education. Formalized relations between organized teachers and the state are unlikely in a free market. However, if amended, the characteristics of the proposed labour-relations model could reasonably apply to the market regulation of education. The amendment required is to state that teacher unions protect members, rather than proactively negotiate employment conditions (Appendix F). Organized teachers would rely on third party interventions, such as arbitration and public opinion, to protect individual teacher's interests.

With the amendment, does the phrase labour relations still adequately describe the relations? *The labour-relations model emphasizes the teacher role as worker and the individual exchange of labour for incentives. The state facilitates the free market. The*

traditional social and ethical habits if they are to work properly. Contracts allow strangers with no basis for trust to work with one another, but the process works far more efficiently when the trust exists" (p. 150).

teacher union tries to protect its members from the extremes of the market. The union is third party to the market relations between the state as employer and the teacher as worker. Even though formalized relations between organized teachers and the state are unlikely in a free market, the union is influenced by and tries to influence the state. Market relations imply participation in an exchange. Industrial relations imply collective action. The phrase, labour relations, is intended to connote the union support for the individual teacher's transaction in the market. However, the union support takes the form of protective strategies, rather than proactive negotiations. Labour relations also convey the economic rationalization of political action in a free market.

Chapter 5 looked at the relations of organized teachers and the state in Victoria, Australia. Chapter 6 examines the relations of these parties in Québec, Canada.

CHAPTER SIX

CLASS RELATIONS IN QUÉBEC, CANADA

The proposed ideal type, class relations, appears to form the basis of the interaction between organized teachers and the Government of Québec, Canada. The preliminary typology proposes that *class relations focus on social change*. Social rationalization of political action would characterize class relations between organized teachers and the states. The model anticipates that social unionism would oppose the authority of a class state in pursuit of the collective interests of workers and an egalitarian society. Central determination of the curriculum, and teachers perceived as technicians implementing prescribed programs, would characterize knowledge in education.

The concepts of control and opposition and a social agenda significantly influencing the relations of state and organized teachers regarding education reform are supported in Québec. Québec political parties, teachers, and their union share an interest in the protection and growth of the province's francophone society. In spite of the shared goals, the state retains authority in a traditional hierarchy in its relations with organized teachers. History demonstrates that Québec governments employed paternalistic, authoritarian strategies characteristic of a class state that continued with less rigour into the 1990s. By garnering public support, the teacher union exercised significant influence on the state regarding the social aspects of education reform.

Historical accounts and the exploration of factors contributing to organized teachers and state relations set the stage for an examination of the influence on education reform in Québec in the 1990s. The teacher organization, the Centrale de l'enseignement du Québec (CEQ⁴), and two Québec political parties, Parti libéral (PL, Libéraux) and Parti québécois (PQ, Péquistes), are introduced in context. The impact of legislated changes on teacher unionism is considered. Reforms suggest relations in Québec are in transition at

⁴ CEQ: The Corporation des enseignants du Québec (CEQ) named in 1967 became the Centrale de l'enseignement du Québec [Québec Centrale (Federation of Unions) of Teaching] (CEQ) in 1974 and was renamed the Centrale des syndicats (CSQ) in 2000.

the turn of the millennium. Throughout the chapter, the Québec historical and 1990s reform experiences are correlated to the preliminary typology.

Historical Background

The historical roots of francophones in Canada and events in the modernization of Québec are *marked by conflict*. The telling is important to understand the political and social context in Québec. The background is developed in three sections. First, the history of Québec is adapted from *Le système d'éducation du Québec* [The Québec Education System] by Micheline Després-Poirier (1995). Second, social unionism exemplified by Québec unions and evident in the evolution of the teachers' organization is explored. Third, the account of the modernization of Québec following World War II to the 1990s focuses on the reform of education.

Québec

Cartier found new land in the name of France in 1534 along the Saint Lawrence Seaway of what is today known as Canada. Catholic clergy founded the schools beginning with instruction of indigenous people in 1615, boys in 1635, and girls in 1639. In 1759, England was successful in expanding its territory in New France with the conquest of Québec. *The Treaty of Paris* in 1763 passed control of New France to England. The signing of *The Québec Act* in 1774 assured the coexistence of French civil and British criminal law, tolerated Catholicism, and permitted francophones to hold office in the governing Council. In 1791 *The Constitutional Act* divided Canada into largely anglophone Upper and francophone Lower Canada and introduced democratic governance processes. Following the failure of the 1837-1838 uprising, Upper and Lower Canada were united in 1841 in a project that maintained the legal systems but excluded French from official texts. The fight for self-government characterized the following decade and helped shape the Canadian confederation. At the turn of the millennium, *the quest for political independence from Canada is a major factor in Québec politics and,*

according to nine Québec participants, this project complicates organized teachers and state relations.

The above historical account of *conflict between the European founding nations of Canada is the backdrop for the reform of education in Québec. The Act of Union*, adopted in 1841, created a public school system with the right of religious minorities to establish alternative schools. The creation of the Canadian Confederation in the *British North America Act* of 1867, renamed the *Canadian Constitution* in 1982, established two levels of government: provincial and federal. Article 93 of the Act guaranteed the rights and privileges of existing confessional schools and gave the provinces jurisdiction over education. Education in Québec continued for the most part to be under the domination of the Catholic Church until after World War II (Després-Poirier, 1995; Payeur, 1993; QT49). The 1960-1965 Libéral and subsequent governments' strategies in both industrial relations and education reform are significant influences on a change in the orientation of the teachers' organization and on the relations between the state and organized teachers.

Social Unionism

Change in the character of the teacher organization from a professional to a social action orientation occurred, states one participant, in the drama of the workers' movement in the 1960s (QT82). *Labour reform and affiliation with labour placed organized teachers in opposition to an authoritative government and contributed to social unionism.*

Formation of the Centrale de l'Enseignement du Québec

The Centrale de l'enseignement du Québec began like most teacher organizations in Canada as an association of professionals (Després-Poirier, 1995; Lessard & Tardif, 1996; Q30, QT39). In 1946, *Bill 164 (Loi créant la corporation générale des instituteurs et des institutrices Catholiques de la province de Québec)* created the Corporation of Catholic instructors (CIC). The law united anglophone and francophone Catholic teachers from the association of rural women teachers (formed 1936), the provincial federation of rural teachers (formed 1939), and the federation of city teachers (formed

1942) (“Profile”, 1997). In 1959, the government modified the law to ensure the membership of all francophone teachers in Catholic schools and automatic deduction of fees at source (Rand Formula⁵) (Després-Poirier, 1995; Tardif, 1995).

In 1967, the CIC became the Corporation des enseignants du Québec (CEQ) (Dionne, 1969). The Corporation became the Centrale de l’enseignement du Québec (CEQ) in 1974 for three main reasons: First, teachers were frustrated with the need for organizational change to be legislated. Second, teachers reacted to legislated interventions in collective bargaining. Third, teachers relied upon joint socio-political action with organized labour. Teachers are indirectly members of the CEQ, the smallest of three centrales or federations of trade unions covered by Québec labour laws. The elected president serves three-year renewable terms. CEQ membership includes unions of non-teachers and totals 125,000 individuals (“Profile”, 1997). The 240 member unions of CEQ are associated with work in public, private and vocational education, health, social services, and educational communications (“Profile”, 1997; Q46, QT48). The education sector unions represent teachers, professionals, or support personnel. The Fédération des syndicats de l’enseignement (FSE) created as a subgroup in 1988, and renamed in 1998, has its origins in the CIC and is the founding organization of the CEQ. The FSE is the largest member group with 75,000 members including preschool, primary, secondary, vocational, and adult education teachers for francophone school boards (“Profile”, 1997; QT42). Linguistic-based school boards (francophone and anglophone) replaced confessional boards (Catholic and Protestant) in 1998.

Participants observe the CEQ functions in a democratic manner through participation, representation, and delegation (“Profile”, 1997; Q17, QT39, QT42, QT49, QT68). Different assemblies and committees make decisions such that the leadership operates with a mandate (Tardif, 1995; Q17, QT39, QT48). One participant observes that *in the tradition of a conflict model, CEQ positions come from a participatory process that creates inflexibility in relations with external bodies*. The participant perceives the CEQ operates on a non-negotiable position based on consensus within the organization (Q30).

⁵ The Rand Formula requires non-union members to contribute to the union regarding costs of collective bargaining but does not require compulsory union membership (Anderson, Gunderson, & Ponak, 1989).

The CEQ pursues its objectives through industrial, institutional, and socio-political means (Clermont-Laliberté, 1975, 1981; Tardif, 1995). The emphasis differs in different circumstances (QT12, QT38, QT48, QT68). Three participants perceive the CEQ radically reformed itself several times in response to member need, its context, or its vision for members (QT12, QT39, QT49). The focus, notes one participant, is on action not policy in a major readjustment of strategy and tactics every five or six years (QT39).

Labour Reform

Boucher (1992) notes that unions gained considerable political power under Libéraux (1960-1965) with the official recognition of unions, the introduction of collective bargaining, and granting to the public service the right to strike. Boucher observes unionism hastened the transition from domination by the Catholic Church to a modern welfare state. Through negotiations, unions continued to claim universal access to health services and education (p. 110). Boucher concludes that *at the foundation of the institutionalization of Québec unions, there is an action typical of social unionism* (p. 111). Dionne (1969) and Tardif (1995) note the first forms of teacher union socio-political action emerged in 1966-1967 when the CEQ created political action committees as a vehicle for *consciousness-raising* regarding poverty and social inequality in Québec.

Affiliation with Labour

Clermont-Laliberté (1981, p. 12) observes that, historically, unions represent the instrument for the working class to limit exploitation and domination in the workplace. Collective agreements and strikes are the main means at the disposal of workers to defend their interests. Clermont-Laliberté notes that the strike is not a result of poor functioning of negotiations, but rather a means of collective action in a '*rapport de force*' to express solidarity and modify the balance of power to force employers to improve working conditions and salaries. Solidarity in unionism, she observes, must constantly be reconstructed (see also Flanders as cited in Sigurjonsson, 1989). Two participants define a '*rapport de force*' as *socio-political action or a pressure tactic that takes many forms, is difficult to maintain, but preserves union autonomy and independence* (QT12, QT82).

In the 1960s struggle for economic equality with the private sector, notes Boucher (1992), Québec unionism experienced class solidarity that extended from underpaid service workers, bureaucrats, and semi-professionals to professionals such as teachers (p. 111). Wright (1979) notes “the teachers wrestled with the dilemma of whether to consider themselves professionals or workers” (p. 149). One participant believes *the change in how teachers perceived themselves enabled the teacher organization to break from the professional institution and insert itself in the labour movement*. The participant notes the changed perception also led, in 1967, to the separation from the CEQ of school principals and people in school-board management positions (Lessard & Tardif, 1996; QT39). Teachers perceived a school principal, notes one participant, to be a boss who represents management at the school level (QT79).

Three events brought teachers and labour together: (a) labour reform, (b) the adoption of provincial bargaining for the public sector, and (c) CEQ lack of success bargaining alone with government. Güntzel (1985) notes that teachers joined organized labour in opposition to the proposed labour reforms that did not recognize public sector employees’ right to strike. The joint action achieved two amendments, granting government employees and then teachers the right to strike. Dionne (1969) identifies the joint action as the entry of teachers in intersectorial relations among centrales. Public sector unions joined teachers in opposition to the National Union Party’s *Bill 25* that legislated an end to the teachers’ strike in 1967 and centralized teacher negotiations. Dionne (1969) suggests the joint action reinforced the working relationship among the centrales. However, the CEQ engaged in a common front in negotiations with other centrales only after the unsuccessful conclusion of the first provincial teacher negotiations that included ineffective recourse to legal avenues (Tardif, 1995).

Participants note the enormous influence on life in Québec of the three centrales that represent approximately 400,000 public sector workers (Q50, Q65, QT68). Tardif (1995) remarks that the centrales formed the first common front in 1972 and by March forced the government to recognize their unity and to meet with the centrales at one table for resolution of salaries, job security, pension, and income continuance. The centrales called a general strike intended to force new offers at the table in April of that same year. In response, the Libéral Government imprisoned the three presidents for inciting others to

disobey the law (Q17, QT68), imposed heavy fines on union leaders and those abstaining from work, and decreed teacher working conditions (Tardif, 1995). Tardif and one participant (QT68) state that this heavy-handed government action created an important place for the three centrales in the social and political dynamics in Québec.

In the 1970s, participants note, everything was put in question in Québec (Q17, Q50, QT68). *Teachers rejected a consultative process in education reform in preference for a coalition with labour and an agenda for social reform* (Clermont-Laliberté, 1975, 1981; Laliberté, 1978; QT49). In 1970, the CEQ defined its mandate to include *social action* and for a decade took on a Marxist orientation (Clermont-Laliberté, 1981; Desbiens, 1978; Després-Poirier, 1995; Güntzel, 1985; Laliberté, 1978; Lessard & Tardif, 1996; Roy, 1978; Tardif, 1995). Participants identify the CEQ as very militant, classic left during this period (QT14, Q17, Q30, QT68). Boucher (1992), Després-Poirier (1995), Güntzel (1985), Lessard (1990), and Tardif (1995) perceive Québec unions to be *radical both ideologically and in their actions*. The Centrale de l'enseignement du Québec is no exception, engaging in 53 days of strikes between 1970 and 1990 (Tardif, 1995).

One participant thinks the teacher union affiliation with trade unions directs the CEQ focus to *the role of workers in society and issues of oppression* (Q30). Another participant believes that, generally, the teacher union is perceived as *in opposition to and a critic of the government* (Q46). Clermont-Laliberté (1981) identifies a tension internal to the teacher union between those in pursuit of an intellectual role for the CEQ shaping Québec society and those supporting an economic orientation; both groups, however, opposed the state and the use of coercive legislation (p. 28). Clermont-Laliberté concludes the CEQ in the 1970s leaned on its role to defend the economic and professional interests of its members, to try to *raise the consciousness* of members regarding social relations in a capitalist society and to link teachers' interests to those of other workers (p. 64). Boucher (1992) and Tardif (1995) concur that the teacher organization affiliation with labour and the union movement in Québec demonstrated class solidarity in a *movement for social change, as well as seeking economic advancement*. *The goal of social change is consistent with social unionism opposing an authoritarian class state envisioned in class relations in the preliminary typology*.

Education Reform 1960s, 1970s, 1980s

Participants celebrate the democratization of and achievements in education and observe that education reform in Québec has been almost constant since the 1960s (QT49, Q50, Q51). Two participants note the *ongoing education reforms feature linguistic and religious issues* (Smith, Foster, & Donahue, 2000; Q30, Q41). The 1990s structural and curriculum changes are considered separately from three periods of note in early reforms.

1960s, Parent Report

Participants observe the 1960s' school change shaped by the *Parent Report* (Report of the Royal Commission of Inquiry on Education in the Province of Quebec, 1963-1966) was integrated in the broad context of the *Quiet Revolution* (Q30, QT38, QT49, Q50). Lessard and Tardif (1996) explain 'Quiet Revolution' as a political and ideological expression in the sense that historical actors sought change that was a conscious, planned, and voluntary rupture with the past.

Two participants, like Berthelot (1993-1994), Dionne (1969), and Mellouki, Côté, and L'Hostie (1993), note that initially, change came from outside the education system because neither teachers who were submissive to Catholic ideology nor the teacher organization, were behind the reforms (Q30, Q50). The Libéraux' Parent Commission reviewed education at all levels and introduced change that brought uniformity to school operations in Québec (Després-Poirier, 1995; Lessard & Tardif, 1996; Q41). Participants recognize the recommendation to create the Ministère de l'éducation du Québec (MEQ, Ministère) as a change of substance and a symbolic act that passed *education leadership from the Church, religious orders, and private ownership to the minister of education* (Q17, Q41, Q65). The Québec Government adopted the French model of centralized authority⁶ and retained many of the controlling and paternalistic attributes of the Church

⁶ Political pressures motivated the centralization of the state in France. Tocqueville (as cited in Fukuyama, 1995) observes the political centralization resulted in no community "however small, no hospital, factory,

resulting in rigorous social control and a context unfavourable to unionism (Lessard & Tardif, 1996, p. 114). Smith, Foster, and Donahue (1999) observe that *centralized direction of education reform continues to characterize Québec education*.

1970s, Le manuel du 1er mai

One participant observes the *CEQ developed ideological pedagogical interventions* to animate the membership on a continuous basis (QT39). Tardif (1995) identifies 15 *pedagogical interventions by the CEQ over twenty years, characterized by social themes* ranging from *Le manuel du 1^{er} mai*, ‘School is Not Neutral’, in 1975 to *Notre maison à tous: récupérons notre planète* (environmental issues) published in 1993. Berthelot (1993-1994) observes *the will to reconcile social and pedagogical aspects of education continues at the center of the CEQ preoccupations to the 1990s* (p. 132).

1980s, L'école québécoise

The Péquistes governed from 1976-1985. The PQ proposed education reform reflective of the back-to-basics, business, and market oriented thinking (Henchey & Burgess, 1987; Lessard & Tardif, 1996; QT38). One participant observes the subsequent reforms, *L'école québécoise* [The Québec School], demonstrated the CEQ influence that caused the PQ to shift from the right to a centralist position (QT38). CEQ action was redeployed on a professional front with diminished radicalism for the balance of the 1980s and into the 1990s, observe two participants, but *remained consistent with social issues thinking* (QT39, Q87). Two participants note the issues: streaming students, early childhood education, the confessional nature of schools, and funding private schools (Q17, QT38).

Lessard and Tardif (1996) observe *government assumed greater control of teaching in the 1980s*, providing more precise programs with no margin for local adaptation or teacher determination of specific objectives (p. 182). The co-authors suggest the political leadership neglected the rapport of teaching with knowledge and culture and risked relegating teaching to technician status with instruction directed by

convent, or college [that] had a right to manage its own affairs as it thought fit or to administer its possessions without interference” (p. 120).

objectives (p. 180). Three participants agree the program placed teachers in a situation of dependence (Q17, Q30, Q46). Three participants maintain teachers have flexibility in presenting materials, but by year-end students must achieve the program proposed by the government (QT14, Q17, Q26, QT54, QT74).

The teacher union emphasis on social issues, government prescribed programs, and teachers perceived as technicians are congruent with class relations in the preliminary typology. The class relations model anticipates social unionism in opposition to an authoritative class state that maintains central control of the education program.

Contributing Factors

In addition to a history that conditions Québec to governance by authority, Québec society to conflict, and organized teachers to social unionism, other factors contribute to confrontational class relations between the teacher union and Québec governments. The following sections look at the social and political contexts, the centralization of power, and psychological factors arising from personal experience.

Social and Cultural-Linguistic Context

Participants observe interactions among themselves and within Québec society that distinguish the Québec society in both social and cultural or linguistic ways. Four participants, both anglophones and francophones, comment on the *differing conceptions of work relations and conduct of business by anglophones and francophones* (Q46, QT49, Q56, Q87). The participants observe anglophones take a practical business approach wanting to know the task, the salary, and their responsibilities, then resolve problems as they arise. They describe francophones as more ideological, taking a global approach to problems and identifying the context and values before resolving concrete issues. One person recalls the francophone local agreements were an exhaustive catalogue endeavouring to predict every possibility; in contrast English sector local agreements were thin, containing only essential articles (Q46). Even the process differs, notes one participant; anglophones prefer to address the school board directly while

francophones participate in numerous consultation tables (Q56). Parallels to propensities in the French culture are apparent. Fukuyama (1995) perceives a “low level of trust among the French and their traditional difficulties associating with each other spontaneously in groups” (p. 118) and “a French dislike for face-to-face authority relationships” (p. 235). One participant generalizes the differences: francophones decide upon the principles then apply them regardless of the situation, and anglophones ignore the principles and look at the actual situation. Hence, *there is constant conflict in the way of appreciating the situation* (QT49). *The anglophone-francophone difference in processing and creating meaning contributes to the dynamic of conflict in Québec society.*

One participant believes *people in Québec accept more social action on the part of unions than those in predominantly anglophone provinces* (QT49). Another participant thinks many teachers believe the CEQ has a role as critic of government decisions and as a significant agent for social change (QT12). Government consultations and the literature provide examples of public debate in education. One participant observes governments used consultation regarding reforms proposed in the 1960s, 1980s, and 1990s (QT38). A public debate regarding unionism and the quality of teaching was published in 1978 at the close of a period of CEQ actions based on a Marxist orientation. The three writers demonstrate philosophical discourse and debate in Québec (Desbiens, 1978; Laliberté, 1978; Roy, 1978). *The francophone tendency to take an ideological approach, attending to context and values, favours philosophical debate and principled social unionism.*

The Political Context

There are two factors arising from Québec politics that influence the CEQ orientation and relations with Québec governments. First, there is a void in Québec politics the Centrales endeavour to fill. Second, relations with the two main political parties are differentiated by nuances related to Québec sovereignty.

Québec Politics

Governments in Québec, two participants observe, tend to be *centralist*, leaning not too far to either the left or right because of the social and political dynamics unique to the province (QT38, QT39). One participant identifies the *question of sovereignty* as a major factor distorting the dynamics and political process of Québec, creating a tendency for Québec governments to neglect fundamental social and economic issues that normally fuel a left-wing party (QT39). Five participants believe none of the provincial political parties is social democrat (Tardif, 1995; QT12, QT39, Q41, QT49, Q56), but two note, *the parties' style of operation is altered to the Québec society* (QT38, QT39).

Two participants describe how *the absence of a real left-wing political party* in Québec creates a political context where most of the *opposition to government is extra-parliamentary*. The participants describe the leaders of trade unions as the most ardent critics and compare the union role to the Opposition in politics, a role of overseeing without the authority to make changes (QT14, QT39). The size of CEQ membership, and its history as *a body that knows how to make timely and significant alliances*, cannot be ignored, one participant notes (Q46). Others also recognize the CEQ as *a social force working both in and beyond the education sector* and beyond the mandate to address member needs (Q07, QT14, QT38, Q46, Q56, QT68, QT74). Four participants note the CEQ generated questions, drew attention to a different perspective, and pushed reflection further. The participants saw minimum salary, pensions, job security, and the lot of working women improve due to unions raising the issues (QT38, Q46, Q56, QT68).

Participants observe members seek CEQ independence and distance from political power and significance as a force in Québec society (Clermont-Laliberté, 1981; Tardif, 1995; QT12, Q17, QT42, QT49, QT82). Lorraine Pagé, a former primary school teacher and the first female president in a union traditionally dominated by male secondary school teachers (Q50), advocated collaboration with government. One participant suggests Pagé, who was narrowly re-elected in 1997, was hotly contested, not for being nationalist, but for using her position (QT49). Three participants think members perceived Pagé to be too close to the PQ political power. The participants note Pagé participated actively in the PQ referendum campaign and supported the PQ zero-deficit policy at the first Québec economic summit (Q07, QT12, Q17, QT49). One participant

cautions that once unions engage in consultations such as the PQ summits, unions abandon *pressure through civil society* and become a partner of the government (QT39).

Political Parties

Several participants perceive little difference in the CEQ relations with government, regardless of the political party in power (Q07, Q26, QT38, Q51, Q56, QT68). Other participants note nuances and some changes in the interactions with the two major political parties (Q17, QT39, QT82). Participants perceive Libéraux sought less teacher input in policy than the Péquistes. However, the union had less difficulty negotiating better deals with the Libéraux (Q17, QT39, Q50, QT82). One participant perceives that Libéraux are more open to the bargaining process, know how to do business, and deal with difficult problems. The participant perceives the Péquistes as more dramatic with less organizational capacity to compromise (QT39). Participants observe CEQ political affinity and more collaborative relations with the PQ (QT12, Q30, QT39, QT42, Q51). One participant notes, however, the PQ distances itself from the CEQ regarding labour issues (Q30). Participants observe the most difficult and divisive negotiations occurred with the PQ in 1982-1983 (QT68, QT79), but relations with the PQ during the 1990s were more positive (QT39, Q41, QT49).

Participants remark that an important event for the CEQ was the founding, in 1968, of the Parti québécois, the party that supports the right of Québec to self-determination. Some participants believe the PQ took power in 1976 due to the support of the unions (Q17, Q65, QT68). Some participants note the PQ's almost limitless purse and concessions to unions prior to both referendums on Québec sovereignty (Q41, QT49, QT68). Two participants believe political affinity with the PQ exists because CEQ is officially sovereigntist: It is difficult to contest a government position when the organization shares a political ideal with the same government, and when members largely share political allegiance (QT12, Q46).

In 1978, Laliberté anticipated there would be a shift in CEQ political allegiance to support the national project. Laliberté cautions that the CEQ runs the risk of perceiving the election of the first Péquiste Government as a new Regime with which to integrate. In Laliberté's opinion, the CEQ risks repeating the same error made previously by CEQ

militants' expectations of the Quiet Revolution and, before them, the institutional professionals hopes for teacher unionization in the 1940s. The Québec national agenda blurred the notion of class conflict (Q30), diffused CEQ militancy, and moderated the CEQ orientation. Following the 1976 election, PQ supporters were “disenchanted by a discourse that stressed class differences between Québeckers at a time when separatist nationalists were desperately trying to unite the nation around the goal of sovereignty” (Güntzel, 1985, p. 107). The results of a 1979 internal CEQ referendum supported the national agenda, brought an end to Marxist discourse, and led to the 1982 review of the CEQ ideological orientation (Berthelot, 1993-1994; Güntzel, 1985).

Participants note that CEQ relations with Québec governments are influenced by membership from within and are closely entwined with circumstances and the socio-political climate. Hence, *relations vary considerably across time, rather than with a particular political party* (Q17, QT42, QT49, Q50, QT68). One participant notes that when the CEQ disagrees with a government policy or action, then the CEQ makes its disagreement known, regardless of the party in power (Q51). Another participant observes that the CEQ has always been able to restrain all governments whether Libéral or Péquiste (Q26). Thirteen participants mention two constants in the relations between the government and the CEQ. Constant are *participatory relations on education issues* (except in the 1970s) and a *constructive opposition or confrontational relations on industrial and social issues*. The 13 participants hold this opinion regardless of the political party in power. Two participants note the public perception is one of confrontational relations regarding working conditions and political issues. The CEQ influence on education is not evident publicly (Q17, QT42).

Québec politics invites social unionism due to the vacuum created by centralist governments, the focus on Québec sovereignty, and the lack of a left-wing party. The union exerts extra-parliamentary pressure on the government through social debate. Participants generally observe the *Québec national project moderates the CEQ orientation and differentiates CEQ relations with Péquiste or Libéral governments.*

The Centralization and Polarization of Power

Participants identify the MEQ and the CEQ as two very centralized structures (Q30, Q46, Q50, Q87). *The stance of, and strategies employed by, the government and the CEQ favoured the polarization of power and created confrontational relations congruent with those anticipated in class relations in the preliminary typology.*

Provincial Bargaining

Until 1967, participants observe, there were inequities among teachers across the province because each school board negotiated salary and working conditions with its teachers (Q30, Q46, QT79, Q87). Gützel (1985) notes “from the outset the negotiations suffered from the absence of the provincial government, which the local school boards largely relied on for funding” (p. 99). With the *imposition of provincial negotiations* in 1967, participants observe the CEQ gained enormous *power* (Q30, Q36, Q46, Q87). Three participants describe how teachers created a cartel of francophone and anglophone⁷ teacher organizations for provincial negotiations, that, in their opinion, has resisted all government attempts to divide teachers (QT39, QT49, QT68).

Two participants note the CEQ employs very traditional bargaining based on an *employer-employee orientation* and *reliant on ‘revendication’*=(demands, claims) and *the collective actions and tactics of organized labour*, including a non-teacher hired negotiator (Clermont-Laliberté, 1981; Wright, 1979; Q07, QT14). One participant identifies the process as an exhausting effort that created divisions in the government ranks and within the union (Q41). Three participants note teachers often did not sign an agreement but had their contract conditions legislatively imposed, except during the 1990s (Tardif, 1995; QT38, Q50, Q87). One participant observes that, *in the end, the government decides* as ‘employer’ rather than ‘guardian of the public interest’; that is, the participant clarifies, the public interest becomes what the government believes it can afford (Q50).

Participants describe how the CEQ negotiates salary, pensions and policy issues applicable to member groups at an intersectorial table. The francophone (FSE) and

⁷ Teachers employed by anglophone school boards are in a union independent of the CEQ. In the legislated creation of linguistic school boards in 1998, the provincial associations of Protestant and Catholic teachers,

anglophone (QPAT) teacher unions collaborate in a second level of provincial negotiations to negotiate working conditions and the organization of work with the Comité patronal de négociation [Employers' Negotiating Committee] that represents government and trustees (Q17, Q36, Q56, QT68, QT82). Five participants note *historical agreement by both sides on the need to codify conditions of teaching ('minutage')* (Q07, Q30, Q41, Q46, QT49, QT79). The practice dated, note participants, to the Quiet Revolution and the belief that reform detailed from above was bound to work (Q41), resulting in a 200 page collective agreement by the end of the 1960s (QT79). In 2001, the document is 330 pages (Entente intervenue entre le comité patronal de négociation pour les commissions scolaires francophones (CPNCF) et la Centrale de l'enseignement du Québec (CEQ), [Agreement between the Employers' Negotiating Committee for the Francophone School Divisions and the Québec Centrale of Teaching]). The *relations are a question of lack of trust in the employer* (QT68, QT79) and *lack of confidence in those who administer education locally* (Q07), explain participants. The detail of the collective agreements and apparent lack of trust in its administration are consistent with management by Taylorism and cultural influences: the historic French emphasis on centralization and general lack of trust among French (Fukuyama, 1995).

Government Intervention

Confrontation marks relations between organized teachers and the state from shortly after the rural female teachers first unionized. In the 1950s, the Duplessis government took away the rural teachers' right to negotiate. Thivierge (as cited in Lessard & Tardif, 1996) observes that rural and urban female teachers put a radical stamp on the quest, during the 1950s, for rights and equal salaries for female teachers (p. 87). It wasn't until 1967 that female teachers' demands for equal pay were achieved.

Bill 25, 1967. Lessard and Tardif (1996) perceive *Bill 25* as a step toward the unification and professionalization of teachers (p. 105). At the time, *Bill 25* was not so welcome. Following local job action beginning December 1966, the National Union Party Government passed *Bill 25* in February 1967 to end teacher strikes, impose

PAPT and PACT, were joined to form the Québec Provincial Association of Teachers (QPAT) (Q30, QT49). Bilingual non-Catholic teachers formed the first Canadian teacher association in 1866 (QT49).

working conditions until June 1968, and institute provincial bargaining (Dionne, 1969; Després-Poirier, 1995; Güntzel, 1985). *Teachers lost trust in the government and experienced frustration with the collective bargaining process. The event ruptured teacher and government relations* (Berthelot, 1993-1994; Clermont-Laliberté, 1981; Mellouki et al., 1993). The CEQ choice of a radical response to lack of success in provincial bargaining and loss of trust in government also may have roots⁸ in the French labour tendency to revolt in crisis against authority, rather than achieve ongoing incremental adaptations (Fukuyama, 1995).

Güntzel (1985) and Laliberté (1978) conclude that *Bill 25 had repercussions that shaped the CEQ ideological orientation*. Güntzel (1985) perceives the government intervention at once strengthened trade union advocates and diminished the influence of institutional (professional) advocates (Clermont-Laliberté, 1981; Mellouki et al., 1993). Güntzel notes that a social orientation gained strength in the early 1970s. Similarly, Laliberté (1978) remarks that the end of participation in the 1960s education reform, and the lack of support in schools to achieve the government's promise of social transformation, disillusioned teachers. Laliberté believes that in organizing provincially Québec teachers sought professional authority until the passage of *Bill 25* (see also Mellouki et al., 1993).

Laliberté (1978) recognizes that a union and a professional orientation worked in complementary ways for the CEQ, until the union strategies met government resistance. The result was failure of the first provincial negotiations in 1968-1969. In 1970, the CEQ passed a resolution to involve its members in socio-political action (Clermont-Laliberté, 1975, 1981; Després-Poirier, 1995; Güntzel, 1985; Lessard & Tardif, 1996; Tardif, 1995). Laliberté perceives *the CEQ used the shift to a dominant social orientation to rationalize a strategy of opposition, in preference to collaboration or negotiation*. For Laliberté, the change demonstrated a passage from professional to radical, and from

⁸ Fukuyama (1995) observes in France a fragile acceptance of strong, centralized bureaucratic authority. "When pressures for change build to a breaking point, participants in the system lurch to the opposite extreme, revolting and questioning all authority. The pattern is replicated in French labor-management relations, which are seldom capable of small, incremental adjustments but tend to explode periodically in crisis periods of highly politicized labor actions designed to achieve goals at a national level" (p. 121).

integration to systemic opposition. Clermont-Laliberté and Güntzel, like Laliberté, find the change in CEQ orientation occurred in response to a change in government structures.

1982-1983. Teachers made big gains under the PQ in 1979. One participant recalls teacher demands covered absolutely everything that was foreseen. The participant notes teachers barely passed the 1979 contract that made Québec teachers the highest paid with the lowest workload in Canada (QT49). The gains were lost three years later by provincial decree (Güntzel, 1985; QT49). One participant observed there were high salary increases then inflation dropped, state revenue lessened, and the state debt was significant (Q51). Teachers were on strike for 15 days when the PQ legislated teachers back to work, diminished working conditions, and rolled back salaries (Beaulne, 1995; QT74). Four participants think the defeat demoralized teachers, marked teacher's commitment to their union, and created difficulty for the CEQ to remake the union life (Berthelot, 1993-1994; Tardif, 1995; QT49, QT54, QT68, QT79). *Teachers felt betrayed*, notes one participant, because the same government that teachers supported through elections and a sovereignty referendum, negotiated and then reneged on the agreement (QT49).

1997-98. To meet deficit reduction targets, the PQ Government determined that approximately 25% of total government cuts would come from the education sector. The premier indicated that if the centrales could not determine how the total reduction was to be achieved, the government would impose a solution which could involve breaches of current collective agreements ("CTF summary", 1996). Issues were resolved through negotiations.

In summary, the institution of the MEQ and provincial bargaining centralized government and teacher powers. Government intervention and assertion of control during the late 1960s and early 1970s tipped the scale toward polarization of the two powers. The interventions in collective bargaining demonstrate regulation by rule and are characteristic of a class state. Teachers actively chose social unionism. Québec governments in 1967, 1972, and 1982 took back something of value, be it a process, status, or a condition that they had given to teachers. These governments broke teachers' trust. During the late 1980s in Québec, there was no trust and no militant opposition. The 1982 intervention undermined the CEQ and demoralized teachers who had just chosen a

moderate orientation respectful of the national agenda. The CEQ achieved gains on social issues in education and minimized the impact on salary and class size (QT49). The question of trust brings the experience from a social or political event to a personal level.

The Personal Experience

Moving from the social and political contexts this section considers participant language as an indicator of lack of trust. The *language of participants reflected the presence of conflict* and strongly conveyed *contradictory messages of mistrust and caring*.

Participants' language exemplifies state domination and the counter action of the union: relations of 'power and confrontation', CEQ 'defends' and 'claims', government 'decides' and 'imposes'. The actions align with the anticipated opposition of social unionism to an authoritarian class state as expected in the class relations proposed in the typology. Government interventions in the teacher collective bargaining process exemplify the power struggle and feed the confrontational aspect of the relations.

One participant describes the CEQ and Québec government relations as a 'partnership' rooted in 'conflict' and characterized by 'mistrust', 'deep suspicion', and 'uneasiness' (QT79). Two participants observe the 'threat' of militant action is present and 'open conflict' exists at times (QT68, QT82). A fourth participant characterizes the tension as 'an uneasy sense of fear', with the government fearing that the CEQ might revive, and the CEQ perceiving government as a 'threatening figure on the horizon'. The participant explains this image existed because the CEQ president usually only met with the Premier when the Premier was giving an ultimatum. The participant also notes teachers felt 'betrayed' by the legislated intervention in bargaining (QT49). One participant recalls over 15 years of 'confrontation' in Québec (Q41). Another participant observes the CEQ has always been able to 'restrain' all governments, and that government 'fixes and sets' (conditions and policy), and the CEQ 'defends' (teacher interests) (Q26). Wiener (1999) suggests the history of conflict and lack of trust between teachers and the government may be barriers to successful education reform at the turn of

the millennium. Four participants anticipate change with changing teacher demographics (QT39, QT68, QT82, Q87).

There is a guarded openness between the government and the teacher union, *a willingness to participate but not commit*. As one participant noted, the CEQ adopted the motto *'extended hand, eyes open'* (QT48). Another participant perceives a certain distance is maintained even when the people know and respect each other (Q07). Two participants note talk of partnership, but observe only a process of going through the motions when one looks at the outcomes (Q65, QT79). One participant points out *government decides how and when the consultations will occur* (Q65). Another notes the 1990s' accent on partnership was ineffective, such that 1996 saw the CEQ return to militant action and pressure tactics (QT82). One participant believes there is an unbroken dialogue through personal contacts of government with CEQ leadership (Q51). The dialogue is incomplete for four participants. One notes it is difficult to get information to be able to work from a shared and common information base (QT79). Another notes it is difficult to determine the degree to which the CEQ accept a reform (Q87). Two observe the CEQ is demanding and rarely expresses appreciation for government initiatives (QT64, Q87). Another person observes the *lack of appreciation* works both ways (QT54). Is culture a factor? "Observers of the French political system have noted that the dislike of face-to-face participation reduces opportunities for pragmatic adjustment and creates blockages and a lack of feedback" (Fukuyama, 1995, p. 121).

One participant observes there is sometimes government collaboration, sometimes pressure, and *always consultation* with the CEQ (Q51). One participant perceives the consultative process as the way for the government to legitimize its own agenda. However, the participant believes that consultation done in a balanced way, with respect for the people around the table, is a trade off of short-term disadvantage for long-term advantage (QT39). Another thinks that if Québec truly wants to see change at the school level, a new style of working needs to be established between the government and the CEQ. The participant thinks if this does not occur, the language from above and the language in practice will be so different that there will be misunderstanding (Q65).

Lack of trust and inability or unwillingness to commit, suggest that relations are not a partnership. One participant observes that *consultation is an element of, but not the*

essence of, a democratic way (QT39). Mistrust more likely engenders opposition and caution than collaboration and commitment. An authoritarian class state retains control, to which the teacher union places itself in opposition in the class relations in the preliminary typology. Prescribed education reforms created the perception of teachers as technicians. In concert with a history of conflict, there were social, political, structural, and psychological factors that favoured social unionism in opposition to an authoritarian class state, as anticipated for class relations. Relations in Québec are undergoing change during the implementation of the 1990s reforms and with changing teacher demographics.

Education Reform in the 1990s

Four participants observe Québec, as elsewhere, is modifying basic relationships to put neoliberal flexibility in the system, create more accountability to outside forces, and make the societal change from an industrial to an information based society (Henchey, 1999; Smith et al., 1999; QT12, QT39, Q50, QT68). One participant notes globalization and free trade create particular challenges because societies and individuals no longer uniquely influence their own affairs (QT68). Participants observe CEQ influence was key in the modifications made between the proposed and the adopted law (QT12, Q50, Q51, QT82). Generally participants see the reforms in a positive light. To determine education reforms, one participant notes Government considered the OECD Delors Report, a European community report on education, events in the United States where greater responsibilities are given to schools, and major international trends (Q51).

Educational Knowledge

Goals and goal and policy-setting processes are considered. The reform of curriculum and instruction is reviewed.

Education Goals

Unlike trends motivated by economic influences (Smith et al., 2000), participants perceive change to be driven by a Québec agenda that also seeks to *improve equality of*

opportunity and results (QT38, QT49) and to *reinforce the common culture and society* (Q50). The CEQ publicized results regarding increasing numbers of student drop-outs, and thus *created societal pressure for education reform* (Payeur, 1993; QT12, QT38, Q46, QT48, Q51). Nine participants observe that the CEQ criticism of piecemeal reforms, pressure for a global and public review of education, and use of the provincial elections, led to Les états généraux. Les états généraux *is a government-appointed commission to guide education goal setting* in the mid 1990s. One participant thinks the government resistance to public consultations can be considered perfectly normal, since it is the Conseil supérieur de l'éducation's⁹ (CSE) job to monitor the system. The participant suggests the quarrel was whether or not the CSE should do the consultations. The compromise was to create another body for the review, co-chaired by the CSE president, Robert Bisailon (Q50).

Nine participants note *teachers and the CEQ actively participated in the consultation process and influenced education reform*. One participant remarks the CEQ influenced the debate and state decisions by taking positions publicly and in committees. The participant notes the CEQ has *an important social presence that influenced the law* (Q56). One participant notes the PQ initially minimized the role of the Commission but under CEQ pressure, a new minister requested a Commission report and recommendations (Commission des états généraux, 1996; QT38). The report had no status, remark two participants. CEQ 'rapport de force' (QT82), lobbying, and the CSE (Q30) influenced ministerial action.

Two participants note the significant role of Bisailon (Q50, QT49). Formerly a leader within the CEQ, Bisailon became deputy minister responsible for the school reform following the review. One participant believes Bisailon's presence in the three government-appointed functions (chair of CSE, co-chair of Les états généraux, deputy minister) is a product of the CEQ influence in Québec (Q50).

⁹ To reassure confessional interests in the 1960s, Libéraux conceived the Conseil supérieur de l'éducation (CSE) (Q41), an autonomous organization parallel to the MEQ that ensured a voice in education for Protestants and Catholics among others (Després-Poirier, 1995; Q17, Q41, Q51). The CSE advises government on the curriculum, teacher education, and general policy and is free to address any issue. As

Education Policy

One participant observes the Québec government and the CEQ share the perception that education is an instrument of the state rather than determined by professionals (QT49). Eleven participants perceive the CEQ influence on pedagogical matters is limited and indirect, often achieved through the collective agreement and the definition of working conditions. Two participants observe there is a framing of education provincially that is achieved by a combination of government officials and teacher union representatives (Q26, Q51). *The CEQ contribution to education issues appears as a relationship between the CEQ and MEQ bureaucracies and is not visible to the public or transparent to CEQ members.*

Curriculum

Participants note curriculum reform is to ensure a common education and to improve student success (Q36, QT49, Q50, Q51, QT68), but note there is also pressure to meet the needs of interest groups (Q36, QT49, Q51, QT68). In all five required subject areas, two participants note students learn the art of comportment, intellectual skills, rigorous work, and verbal expression (MEQ, 1997: la grille-matières de cinq domaines, les compétences transversales; Q51, QT82). Decentralization passed most of the pedagogical responsibilities of school boards to the school governing board; there is now a school role in program emphasis (Wiener, 1999; Q87). Henchey (1999), Smith et al., (1999, 2000), and Wiener (1999) note the *curriculum is less prescriptive with programs based on the provincial curriculum with 25% adaptation by teachers* to enable enrichment and ensure mastery (Q38). One participant indicates the Committee of Program Studies evaluates teacher-developed programs against provincial criteria (Commission des programmes, 2000; Q30). The participant notes the Curriculum Council also must approve MEQ-prepared programs. The confessional committees of the Conseil supérieur, abolished in 2000, previously also approved curriculum (Q30, Q38).

Curriculum is the principal motivation and tool for teachers' daily work, observe three participants (QT12, Q26, QT74). Henchey (1999) describes the provincial

recommended by the Proulx Report in 1999 (Smith et al., 1999), the Government abolished the CSE confessional committees in 2000.

curriculum development process as one that involves all partners in education and includes design, field-testing, implementation, and ongoing development. Four participants observe teachers do not see the influence of the CEQ on curriculum (QT12, QT14, Q46, QT74). Two participants note teachers advising the MEQ are selected in consultation with school boards and do not represent the institutional point of view of the CEQ (Commission des programmes, 2000; Wiener, 1999; Q41, Q87). Wiener (1999) suggests the continuing exclusion of the CEQ “reinforces fears that the top-down, fix-the-teacher approach of the 1980s still enjoys a certain currency within the MEQ bureaucracy” (p. 5, Part I). One participant remarks the *CEQ had no influence regarding the transformation of instructional strategies*; the government determined the program of studies would occur in two-year cycles instead of by year (MEQ, 1997; Q87). Henchey (1999) observes the reforms imply a *major transformation of teachers’ work* with a shift in emphasis from the individual teacher to the whole staff and teacher teams (p. 7).

The reforms that shift some curriculum responsibilities to the school and instructional decisions to teams of teachers are inconsistent with a class state. The reforms signal potential change in the relations.

Governance

The restructuring of school boards and the decentralization of powers focus the discussion regarding school governance. Funding for education is considered in this section.

Restructuring

Five participants note the CEQ wanted linguistic school boards (Q30, QT38, Q41, QT49, Q56). Libérals began the groundwork for the change to linguistic boards and greater school independence from boards with the *Education Act* in 1988 (Scharf & Langlois, 1994; Smith et al., 2000). Three participants note the change required a constitutional amendment (QT38, QT49, Q51). One participant perceives the PQ was

reluctant to request a constitutional change for two reasons. A rejected request would be politically bad for the PQ. A successful request would demonstrate that Canadian federalism could be transformed and could undermine the call for Québec sovereignty (QT38). The request was successfully made, and in 1998, the PQ Government replaced 159 confessional with 72 linguistic boards (Downsizing, 1998; Q51).

Participants note the CEQ also questioned the teaching of religion in schools (QT49, Q56) and undertook to make change among its members (QT49). At the end of the process, notes one participant, both the internal and private opinion surveys showed the membership had evolved (QT49). The Proulx Report released in 1999 “recommended the elimination of all denominational privileges” (Smith et al., 1999, p. 7 Part I), reflecting the CEQ human rights perspective.

Decentralization

In the Québec education system there is the Ministère de l'Éducation [Department of Education], school boards, and schools with formal advisory committees at each level enabling the participation of stakeholders (Smith et al., 2000). Participants note the 1997 reforms create governing boards for each school, Conseils d'établissement (Conseil), to determine the needs of the student population, the education project, and the curriculum emphasis (hours per subject) within the uniformity required provincially.

Smith et al. observe the latitude of the Conseil is limited by decisions made at other tables including: the allocation of facilities, denominational status, education services and admission policy, budgetary rules, and collective agreements. Smith et al. caution that the new powers conferred upon Conseils will be largely illusory unless the regulatory burden is lessened. The co-authors question whether changes increase the role of the school under school board supervision, or whether school boards become “an instrument of accountability for the Minister” (p. 31), that is, inspectors rather than managers of the system.

The Conseil is composed of equal numbers of parents and school personnel with voting rights and two non-voting representatives each from the community and the senior secondary student population (MEQ, 2001; Smith et al., 2000; QT12, Q36, QT48, Q50, Q51, Q65, QT82). The change, participants observe, centers the education system in the

schools (QT12, Q30, Q38, QT42, Q65, QT68, QT82, Q87). Participants note *the CEQ made important contributions regarding the responsibilities given to the school and the respective roles of the Conseil and teachers, by distinguishing administrative and pedagogic responsibilities* (QT12, QT48, Q51, Q65, QT82).

Funding

Lack of adequate funding is an ongoing tension, note two participants (QT49, QT82). Personnel costs, determined provincially, account for 80% of the school board expenditures. The Québec provincial government continues to provide the bulk of funding at 77% of the K-11 operating costs in 1999-2000 (MEQ, 2000). Government grants are based on pupil-teacher ratios (Wiener, 1999) that averaged 14.9 in 1999 (MEQ, 2000). Grants are generally unconditional (Smith et al., 2000). Local property taxation is limited to 15% unless approved by referendum (Smith et al., 2000) and averages 16% (MEQ, 2000). In 1998-1999, per pupil expenditures for K-11 were \$5,573 (MEQ, 2000) accounting for 24.4% of GDP per capita (SK Ed, 2000a). In 1995, K-11 education represented 7.6% of total public expenditures in Québec (Saskatchewan Education, 1999; Statistics Canada & CMEC, 2000). One participant perceives an increase in alternative financing: locker and photocopy fees, fund raising, funding from private companies, foundations, and advertising (QT82). Participants note that the Conseils' access to resources from sources other than government has the potential to lead to excessive diversification, inequality, and inappropriate business interests in public schools (Berthelot, 1999; Q17, QT38, QT82).

One participant observes *CEQ influence to ensure the equitable distribution of resources* (QT42). Participants note the 1997 reforms require school boards to distribute funds in the school division to balance resources and maintain equity. Individuals in the school division have the right to demand equitable services to elsewhere in Québec (Smith et al., 1999; Q36, QT42, Q87). Participants observe the criteria school boards set will vary (Q36), but as of 1998-1999, the boards (and government) must make public their criteria and principles for the distribution of funds (Smith et al., 2000; Q87). The school board can approve, or return, but not amend the school budget adopted by the Conseil. Provincial budget regulations, control of human resource costs through

provincial bargaining, and school board deployment of staff, limit the Conseil budget authority and powers (Smith et al., 2000). Two participants observe teacher employment security is for a lifetime in Québec (Smith et al., 2000; Q36, QT49). One participant observes teachers may be terminated for just cause, but surplus is not a just cause. The participant expresses concern that excess teachers on the availability list could reoccur if schools made staffing decisions without central coordination (Smith et al., 1999; Q36).

Accountability

Four participants note Conseil annual *reports to the community and parents* regarding the quality of education is a new obligation arising from the 1997 reforms (Wiener, 1999; Q36, QT42, QT48, Q65). The MEQ, since 1984, continues to annually publish education indicators that report on the allocation of resources to education, education system activities, and results including student achievement (MEQ, 2000). Teacher certification, teacher appraisal, and student evaluation are reviewed.

Teacher Certification and Conduct

One participant states government certifies and can decertify teachers. Reforms grant a diploma after four years of training with no probation period (Q36). Participants speak of a new four year program integrating disciplinary and pedagogical training and a substantive field practice component (Q17, Q46, Q65). Three participants note reforms to teacher training were discussed closely with the FSE (Q17, Q46, QT48) that in the opinion of one participant, played a unionist role. The law states teachers will play a role in raising the status of the profession, but there is nothing in the collective agreement that requires teachers to accept and work with teachers-in-training (Q46).

One participant observes there is no professional code of conduct other than the education law. The participant notes anyone may lodge a complaint with the employer regarding the comportment of a teacher (QT42). When a problem arises, notes one participant, the school board takes disciplinary action including issuing a warning, working with the teacher for improvement, and if necessary, terminating for just cause (Q36). Specialist professional associations already exist independently of the CEQ and FSE. Five participants observe growing numbers of teachers within the CEQ are seeking

a separate professional corporation to better defend the teacher as a professional (Q36, Q46, QT48, Q51, Q87). One participant is not sure industrial and professional roles should be separate if blending ensures the common good prevails (Q30). One participant suggests the discussion about a professional order obliges the CEQ to take more interest in professional issues (Q87). Another participant suggests all the conditions to protect the public interests already exist in the democratic education system. The participant thinks it more important to improve the quality of service than to discipline individuals. The participant believes that what counts is recognition of teacher power to make professional decisions and to participate in decision making in schools (QT42).

Teacher Appraisal

Participants identify teacher evaluation and professional development as very sensitive and delicate matters (Q36, Q41, QT42, QT48). Four participants observe there is no teacher evaluation (Q36, QT42, Q56, Q65). The absence of supervision is remarkable in the *predominantly authoritarian traditional regulation of education in Québec*. One participant notes that in the effort to professionalize teachers in the 1960s, the Parent Report recommended ceasing the supervision of teachers (Q50). In the transformation of organized teachers' orientation from professional to worker, teacher accountability became a negotiated item. Three participants note the local collective agreements give disciplinary powers to school boards regarding teachers in difficulty (Q36, QT42, Q65). The provincial collective agreement stipulates the basis for pay.

Three individuals perceive negative connotations to the teacher evaluation proposed in the 1997 reforms. The participants note that teachers (Q36, QT48, Q65), the teacher union, and even school administrators (Q36) oppose judgmental evaluation. Is there a cultural influence? Fukuyama (1995) remarks, "consistent with the French dislike for face-to-face authority relationships . . . there is no need for a French foreman to evaluate his workers personally, since their pay rests on seniority and job classification alone" (p. 235).

Student Evaluation

Three participants indicate student assessment is by provincial exams at the end of the final courses. The government publishes unexplained non-differentiated school results that invite unfair comparisons, note the participants (Q36, QT38, Q65). One participant perceives final exams and their public reporting as controls on the system (QT38). Smith et al. (2000) observe the major role of the teaching staff and the school principal in student evaluation is constrained by ministry exams, automatic promotion (elementary), and ministry standards for secondary certification. Québec began publishing education indicators in 1984 and participates in the national and international (OECD and UNESCO) reporting programs (MEQ, 2000). The School Achievement Indicators Program (SAIP), initiated in 1994, measures the achievement of a sample of 13 and 16 year-old students across Canada (Statistics Canada & CMEC, 2000). *The centralized control of student evaluation is consistent with a class state. A class state is authoritarian and treats teachers as technicians.*

Conclusion

Concluding remarks consider the perceived influence of organized teachers and state relations on education reform and the impact of legislated changes on teacher unionism. The appropriateness of the preliminary typology to explain relations is tested.

Perceived Influence of Relations on Education Reform

One participant observes some say the influence of the CEQ is beneficial, some say it is bad, but none can say the CEQ has no influence (QT68). Relations between governments and the CEQ have had a radical influence on reforms, observes one participant who notes *the CEQ can mobilize membership, intervene effectively in public opinion, and organize boycotts or other forms of non-collaboration to block reforms*. The participant characterizes relations as civilized although the dynamics are passionate. There are *three types of CEQ influence: (a) expertise specific to the curriculum, teaching, or the training of teachers; (b) an ideological and environmental influence on broader*

issues; and (c) less influence on technical issues such as boundaries and finance regulations (Q17). One participant observes the CEQ has a great deal of influence because the CEQ advice is very well developed and very solid compared to others (Q07).

Achieving change comes back to union member interests, notes one participant, and the question of how to both deliver change and meet member expectations (QT39). Another participant believes that *achieving the change desired by the teaching profession requires a fight on all fronts. The participant remarks that the CEQ maintained influence longer by using a strategy combining professional influence from the beginning of reform then driven home at the end by militant action to exercise a 'rapport de force'* (QT82).

Impact of Legislated Change on Teacher Unionism

The CEQ is pleased with the 1990s law, thought one participant, because now teachers have power regarding the orientation of schools (Q87). Other participants identify two reasons for CEQ resistance to decentralization. First, participants observe that school autonomy regarding the education program, budget, and determination of time devoted to each subject, risks creating inequalities (QT38, QT68, QT79). Berthelot (1999) expresses concern about the ambiguity in the reforms that have both a democratic and a market face, thus holding the potential for local participation and inequalities of education benefit. Two participants note provisions intended to ensure equity: A provincial curriculum with the same exams and a diploma that has the same value everywhere (QT82, Q87), the same model of decision making in all schools (Q87), and the regulation of the division of resources (Q87).

Second, participants also observe the CEQ is a bureaucratic organization. Decentralization represents a loss of power and causes a loss of CEQ influence on important education decisions that may create inequality in working conditions (Q30, Q36, Q50, QT79). Participants anticipate decentralization will require a cultural change because the CEQ and its member unions will have to shift their focus more to schools and education questions and away from the government (Berthelot, 1993-1994; QT42, QT48, QT68, Q87).

One participant notes the CEQ challenge is to monitor the use of the margin of flexibility by schools, communicate and share ideas regarding possible projects, and coordinate efforts and information (QT42). Two participants note the CEQ training for participants in school governance committees and observed growing confidence in the new relationships (QT42, QT48).

Nine participants identify conflict between the collective agreement and Conseil powers because of the potential for the *organization of work to rest in the schools*. One participant observes that decentralization was to permit the school team to define the model of organization, rather than the historic practice where every teacher has exactly the same status and same time devoted to instruction and supervision (Q56). Two participants perceive teachers are insecure because *teachers do not have confidence in the employer or in the government* (Wiener, 1999; QT48, QT68). The insecurity may reflect low trust, a French cultural nuance (Fukuyama, 1995).

The government retains authority for education in the 1990s and consults with the CEQ. The government is in the process of decentralizing to the schools some work organization and curriculum responsibilities. The shared government and union belief is that education is an instrument of the state, and the shared goal is to protect and nurture the francophone society. These shared beliefs influence the state and teacher union relations. The relations with any one political party in power change with the degree of support for Québec political independence from Canada. However, *Québec governments broke teachers' trust in 1967, 1971, and 1982. Governments reneged on agreements with teachers.* "Groups can enter into a downward spiral of distrust when trust is repaid with what is perceived as betrayal or exploitation" (Fukuyama, 1995). In spite of shared cultural and political goals, and possibly a cultural avoidance of personal face to face conflict, relations in Québec are conflict-based. Confrontation is not unexpected given the dynamic of conflict in Québec's history, the centralization of authority, the union mobilization of society, the social tolerance for public debate, and French cultural influences on interpersonal and interorganization dynamics.

In summary, the comments generally support professional, industrial, and socio-political orientations interwoven in the state and teacher union relations in Québec. *Participants identify professional aspects as the least, and industrial and political*

confrontations as the most evident publicly. Twelve participants concur that the CEQ does not play the role of a professional association. Eleven participants observe a cycle of confrontation in years when negotiating the collective agreement. *Nineteen participants acknowledge a social or socio-political orientation differentiating the teaching profession in Québec from many places.* Seven note that social and political issues and working conditions overlap (QT14, Q26, QT42, Q50, QT54, QT64, QT74).

Tardif (1995) identifies *a social orientation that underpins the policy and service functions of the CEQ.* Participants observe there has always been a clash between the institutional view and *another view that is more political, more open to the social dimension* (QT39, QT49). Three participants perceive the CEQ as a leftist intellectual union that *places great importance on ideology and sees itself as a political movement for social justice* (Q07, Q30, Q46). Four participants observe the *CEQ uses its political weight, the mobilization of the population or the membership, in a 'rapport de force' that causes the CEQ to be very influential with government* (QT12, Q26, QT39, QT82).

Two participants analyze organized teachers' strategies. One participant perceives teachers were submissive in the 1950s, collaborative in the 1960s, and in the 1970s, political and antagonistic as influenced by Marxist thinking and strengthened by the Common Front. The participant observes the teachers were more collaborative within the framework of neoliberal cuts since the late 1980s and cautious regarding Québec independence and perceived alignment with the PQ in the 1990s (Q50). A second participant remarks that teachers rejected the participatory model and made the decision to go it alone by mobilizing the civil society on social issues in an extra-parliamentary tradition. Teachers became more professionally oriented in defence of public education and public service, rather than for professionalism as an end in itself. The participant describes a dual strategy whereby defence of the public service defends public education and jobs (QT39). The first perspective reflects contours in the union relations with government and a sense of the climate as cautious or strained, over time. The second perspective recognizes education as an instrument of the state and describes *the teacher union's fundamental approach to influencing government, the mobilization of civil society, and the union's mandate, advocacy on social issues (public education) and defence of the public service (jobs).*

Class Relations

The teacher union emphasis on broad social change in Québec, both the radical opposition of the 1970s and the more conservative means of social influence since the 1970s, is consistent with *social unionism* envisioned in class relations in the preliminary typology. Participants' vocabulary demonstrates a continuing lack of trust in relations and reinforces images of *confrontational class relations*. CEQ *social unionism* opposes the authoritarian *class state* through the mobilization of society on matters of ideology and principle. *Both* *mistrust* the other party, both 'do their own thing', and neither feels that communication is clear regarding information or points of agreement. A decade of efforts to collaborate without results that both parties celebrate suggests hierarchical and confrontational relations are deeply rooted. Conditions to nurture collaboration are complex. Collaboration requires trust and a sharing of power.

The social rationalization of political action and the associated characteristics set out in the preliminary typology are a reasonable fit with the Québec experience. Although the term, 'class', is also associated with Marxism and class struggles, it is retained in the final typology. Social unionism in Québec since the 1970s is a political force seeking broad social change within a traditional hierarchy of authority. The phrase, class relations, acknowledges the hierarchical, bureaucratic structures and the polarization of power between state authority and organized teachers' influence. Class also conveys the social rationalization of the relations.

To the turn of the millennium, *class relations* characterize organized teachers and the state relations in Québec. The 1997 reforms offer another opportunity to reshape CEQ and Québec government relations. Smith et al. (2000) suggest significant change cannot occur without practical links throughout the Québec education community. The co-authors believe the "Ministry has a crucial role to play in facilitating partnerships" (p. 49).

Chapter 6 looked at the relations of organized teachers and the state in Québec, Canada. Chapter 7 examines the relations of these parties in Saskatchewan, Canada.

CHAPTER SEVEN

PARTNER RELATIONS IN SASKATCHEWAN, CANADA

The proposed ideal type, partnership, appears to form the basis of the interaction between organized teachers and the Government of Saskatchewan, Canada. The preliminary typology proposes that partnership is based on political rationalization of action. The model anticipates an institutionalist state interacting with organized teachers in an integrated manner based on mutual trust. A teacher organization that supports professionalism would participate with government and society in the change process to identify and achieve shared goals and to enhance the status of the teaching profession. The state would perceive teachers as professionals who would participate in the determination by consensus of knowledge in education. The model anticipates an institutionalist state that would both delegate authority and maintain centralized regulatory responsibilities. The dual function would both facilitate the market and correct the inequalities arising from the market.

Shared values and shared responsibility for education are the basis for partner relations in Saskatchewan. Organized teachers are an integral part of the process to determine education reforms.

The historical background presents the roles of cooperation, political action, and teacher activism in establishing the province. The foundation for participation, innovation, and relatively stable relations in education in Saskatchewan developed over time. The intertwining histories of provincial politics and the organization of teachers demonstrate the political rationalization of action that characterizes relations in Saskatchewan. Organized teachers' multiple mandates and long-term strategies and government-fostered collaboration contribute to the partnership. Education reforms are determined by consensus. The state trusts the profession to contribute responsibly to the benefit of youth and society. Throughout, comparisons are made to the preliminary typology.

Historical Background

Saskatchewan began as a rural society influenced by a stern physical environment that demanded a spirit of community and cooperation of settlers. Archer (1980) observes the province's boundaries are clean, straight survey lines not determined by geography, "yet Saskatchewan has gained a character and reputation that readily distinguishes it from its neighbours" (p. 348). Archer recognizes the drought, high winds, erosion, and insect pests combined with the depression and low prices for produce, long year after long year during the 1930s, changed lives in Saskatchewan and shaped the province's future. Archer suggests that Saskatchewan residents, disillusioned with practices that failed during the "Dirty Thirties", were "more willing to indulge in political and social experiments" (p. 349). Cooperation for survival led to formalized cooperative projects (see Blakeney, n.d.). "By 1955 a three-pronged thrust for economic development had become apparent[:] [g]overnment ownership, co-operative development and private enterprise" (p. 293).

Saul (1997) found Saskatchewan to be an exception among the Canadian provinces that "sometimes led while the national government followed" (p. 66).

Western agrarian and social reform movements . . . were central to bringing the national perception of the public good into the twentieth century. This real leadership—that of ideas and direction—far outweighed the still-small Western population. . . . The premier¹⁰ of a small-population province and leader of a smallish opposition party in Ottawa, had more impact on the national drive to create a society based on social justice than any Liberal or Conservative Cabinet minister or any group of ministers. (p. 330)

Saskatchewan is best known as the originator in North America, of medical insurance to provide access to health care as a right. One participant observes the province has made a hobby of attacking problems differently and expresses pride in Saskatchewan innovations that are often copied elsewhere. The participant attributes the short history of the province, the cooperative traditions, the lack of historical complexities, and the relative

¹⁰Tommy Douglas resigned his federal seat to lead the Saskatchewan Co-operative Commonwealth Federation (CCF) Party. In 1944 Douglas, age 39, became head of the first democratic socialist government in North America ("Tommy Douglas", n.d.). He returned to federal politics in 1961 to lead the

CCF. Archer (1980) describes Douglas as a “crusader for reform rather than for narrow socialist doctrine” (p. 260).

homogeneity¹¹ of the population as factors enabling people to do things differently (ST19).

Participants identify a *tradition of working together* in Saskatchewan, a way of thinking where people seek the middle of the road, maintain relationships, and find compromise in a genuine attempt to be fair and equitable in meeting everyone's needs (S04, S60, S66, ST69, S76). Relations are civil in an effort that is collaborative or, in the public sense, cooperative (S04, ST19, ST52, S66, S76). In this geographically large province with a small population, finite resources, and harsh weather, people understand that they must work together if they are going to succeed. Archer (1980) observes that, after the turn of the century,

newcomers from central and eastern Europe . . . settled in group communities which provided community strength to face initial trials but, . . . [s]chools, co-operatives, farmer unions and politics later drew them into the developing heterogeneous ethnic mix. (p. 349)

Participants note the depression reinforced the need to work together (S04, S70, S76). One participant believes people in Saskatchewan try to achieve their goals through *influence* to a greater degree (ST69).

In spite of its geographic isolation, Saskatchewan has a high international consciousness, due to its dependency on world markets (Kouri, 2001). The trend globally, at the turn of the millennium, is an economy open to international corporate forces. However, privatization hasn't flourished in the province to the same extent. One participant remarks people have built cooperatives and credit unions in the private sector¹² that are based on the same social democratic philosophy that has been the driving force in the province (see Blakeney, n.d.; S70). A second participant observes there are insufficient resources to allow for fragmentation through privatization (ST69).

¹¹ The largest population group is of Anglo-Saxon descent. However, combined, Eastern European and Germanic descendants comprised approximately 40% of the population during the settling of the province (Archer, 1980).

¹²For example, in 1988, the Conservative Government privatized the investment management of government-sponsored pension plans. The boards of public sector pension plans, including teacher plans, joined to form the Investment Corporation. Since 1999, employees own the majority share of the organization (55%). The Corporation was renamed Greystone Capital Management Inc. in 1994. Assets have increased from \$3 billion in 1988 to \$12 billion in 2001 (D. McCaslin, personal communication, October 2001).

One participant thinks the real brake to privatization is that, for both philosophical and economic reasons, people want to keep the small school open. The participant observes *the school is tied to the sense of community* (see Christian, 1999). Education also brings in money and helps to preserve the community (Kouri, 2001; S70).

Archer (1980) notes that “out of farmer unions, co-ops and local institutions there developed an infrastructure of leadership at the community level that directly influenced provincial politics and which nurtured a keen political sense” (p. 348). Archer observes that “political involvement and political awareness are part of the Saskatchewan ethos. In this sense cooperative action and political action have been tools of the people as they searched for economic stability and a fuller, more secure life” (p. 349). One participant remarks teachers are *very political small ‘p’ activists* who look beyond the school system, see themselves as part of the province, and value being part of decisions (ST88).

There is widespread teacher influence in both the province’s political and social life, observe fourteen participants. Participants note teachers are involved at leadership levels in both rural and urban local governments and on virtually every governance board at both community and provincial levels including churches, credit unions, health boards, and service organizations. Consequently, observe participants, *teachers are seen as leaders and community builders as well as professionals*. Ten participants perceive that teachers have a more accurate finger on the pulse of what the larger society aspires to and will tolerate. Seven participants note the *general regard for teachers and respect for teacher leadership are fundamental to the influence teachers enjoy in a reasonably open relationship with government* (ST19, ST29, S31, S47, ST52, S66, ST69). Teachers continue to place first in the public trust in Saskatchewan before all other occupational groups (Fast & Associates, 2001).

Saskatchewan Governments

Two participants observe Saskatchewan governments have *good relations with all sectors*. Governments employ a consultative process, good communication, public debate, and no strategy of threats because politicians return to live in the communities

(S60, S70). Two participants identify *cooperation* as a hallmark of how governments do things in the province (Public Involvement, 1994; S67, S77).

Two participants view the Saskatchewan cultural and education partnership traditions as mutually reinforcing; the idea that you work together if you have a problem became translated into organizational behaviour (S60, S67). The collaborative non-partisan relations between government and the teacher organization, Saskatchewan Teachers' Federation (STF, Federation), are deeply rooted.

Three participants believe neither the teacher organization nor the political parties are as extreme as elsewhere in Canada (ST19, ST29, ST78). The foundation of the government and STF relations begins with the intertwining of the teaching profession and the political history of the province, observe six participants. Individuals in government and in the Federation had strong personal relationships, and in the early days, many influential provincial politicians were teachers (ST18, ST19, ST29, ST52, S60, ST69).

Two participants point out *teachers' right to be involved in politics and in all political parties* (Eamer, 1967; ST19, ST69). One participant notes that during the 1920s, M. J. Coldwell, a vice-principal in Regina, was a candidate in both civic and federal elections ("M. J. Coldwell", n.d.; ST19). Although initially unsuccessful federally, teachers perceived Coldwell's candidacy to have "vindicated the teacher's right to exercise his full privilege of citizenship" ("Some S.T.A. portraits", 1929). Coldwell was actively involved in teacher organizations as well as in politics. In 1914, he drafted the economic aims of the predecessor to the STF, the Saskatchewan Teachers' Alliance (STA), and served as president of the STA 1925-1926, and of the Canadian Teachers' Federation (CTF) 1926-1927. Coldwell then served as Secretary-Treasurer of the CTF 1927-1929 ("Some S.T.A. portraits", 1929).

During the early 1930s, Coldwell was instrumental in the founding of a social democratic party in Canada.

"In July 1932 as the Depression deepened, a group of Canadian socialists met in Calgary to map out an alternative vision for Canada. Representing farm, labour and professional groups this conference laid the ground work for the forming of the Co-operative Commonwealth Federation (CCF) the forerunner of the New Democratic Party (NDP). The conference adopted a provincial program which had been drafted by M. J. Coldwell. The program called for a "planned system of social economy for the

production, distribution and exchange of all goods and services” and “social ownership, development, operation and control of utilities and natural resources.” The definitive program of the new party was decided on at a conference in Regina one year later in 1933” (“CCF beginnings”, n.d.).

The new party adopted a social philosophy that was “new to Canadians who were still caught up in the old nineteenth century pioneer ideology of individualism rather than community” (“Woodsworth”, n.d.).

With the CCF winning 47 of 53 seats in the 1944 provincial election (Archer, 1980), teacher influence in Saskatchewan politics became profound. Thirteen teachers ran as CCF candidates (Lyons, in press). Woodrow Lloyd, president of the STF became minister of education overnight and later Premier. Three other teachers also served in the Cabinet (Tyre, 1968, ST19). Under the CCF, party democracy was strengthened, “all legislative matters and budgetary proposals were put before caucus” (Archer, 1980, p. 277), not just Cabinet. *Two decades of CCF governance institutionalized cooperation in education, at least at the leadership level* (Lyons, 1987).

Ross Thatcher’s Liberal Government, 1964-1971, ‘took teachers on’ in a way that resulted in massive protest (ST19, ST29). Thatcher centralized power, dominated Cabinet and caucus, acted without consultation, and was seen by the public as the government (Archer, 1980). Teachers and school principals committed to political lobbying action plans. The issues were “the erosion of professional rights by divorcing school principals from the teaching team and the loss of local autonomy to school boards through compulsory area bargaining” (Young, January 1968, p. 1; see also McDowell, 1971). Thatcher rapidly abandoned the proposed legislation that would have disentitled school principals from Federation membership (McDowell, personal communication, January 31, 1968). One participant attributes the rapid turn-about to the influence of three teachers in Cabinet and notes the event underlines the importance of *politician contacts* that can bring a favourable understanding to an issue (ST19).

In 1970, Thatcher’s *Foundation Grants Act* specified teacher salary ranges. As a result, “teachers joined labour in their opposition to wage and salary control” (Archer, 1980, p. 331). Participants remark that teachers played an active role in the defeat of Thatcher in 1971 (ST29, S31, S67, ST69). “In separate television interviews on election

night, both [Mr. Thatcher and the premier-elect, Mr. Blakeney], listed the position taken by and the influence of teachers as one of the major factors affecting the outcome of the election” (McDowell, 1971, p. 7). Three participants note political parties still refer to the event and the influence teachers can have (S31, S37, ST69). Two participants observe *Saskatchewan teachers have always been active at the grassroots level in political parties as well as seeking public office, a result of the prominent role teachers play particularly in rural communities* (ST19, ST29).

The New Democratic Party remained in power until the Conservatives won the 1982 election. The Conservatives expanded on curriculum reforms initiated by the NDP in a transition of power that proved relatively seamless for the education sector. However, participants note that although the 1986 election returned Conservatives to power, it brought a change of minister and deputy minister. An attempt to change focus in education accompanied this change in senior officials (ST18, S21, ST29, S37, S66, ST69). Participants acknowledge that the education community relations with government 1987-1991 were rocky generally (S37, S60, S66, ST69, S76). Participants attribute the turbulence to a more right wing philosophy with an orientation to work and productivity that saw a larger role for the private sector (ST18, S21, S60, S66, S70, S76). The new deputy minister had a financial bent, no education background, and was out of step with the history of education in the province in the opinion of two participants (S66, S69). Participants recall the deputy chose to question everything. The deputy’s approach as a devil’s advocate caused tensions that strengthened the education organizations’ reliance on collaboration (ST18, ST29, S37, ST69).

Generally, governments and organized teachers have good relations. Relations are built on collaboration, a form of regulation characteristic of an institutionalist state.

Saskatchewan Teachers’ Federation

In 1933, the amalgamation of two organizations, the Saskatchewan Teachers’ Alliance formed in 1914 as the Saskatchewan Union of Teachers then renamed in 1919, and the Rural Teachers’ Association (RTA) formed in 1931, created the Saskatchewan

Teachers' Federation (STF, Federation). Six participants point out that *unity and solidarity strengthen the Federation* (ST09, ST44, ST58, S67, ST98, S106).

Five events enhanced teacher solidarity. Teacher solidarity is influential both to seek and to resist change. First, “the Federation structure borrowed from the RTA a democratic form of organization in which the general membership would have a strong voice in formulating policy” (Tyre, 1968, p. 79). Second, through political influencing and a membership drive that achieved more than two-thirds voluntary membership, STF secured mandatory membership of all provincial K-12 teachers (Buck, 1951; Eamer, 1967). *An Act Respecting the Teaching Profession*, February 21, 1935, recognized the multiple responsibilities of organized teachers and ensured the Federation financial stability with automatic dues deduction. Third, in 1968, teachers rallied against the Thatcher Government’s wage guidelines, imposed bargaining areas, and proposal to exclude school principals and vice-principals from the STF. Fourth, participants observe that the amalgamation, in 1973, of the salary scale and benefits under a provincial contract ensured all teachers are recognized on an equal basis. Hence, in 2000, government proposals to introduce pay equity met teacher opposition. Fifth, in 1974, contrary to the advice of General Secretary McDowell, teachers chose to limit membership to certified teachers to ensure a continued organization focus on professional issues. McDowell believed inclusion of teacher associates in STF membership would make the STF the voice of the instructional team in schools (Gallén, 1997b).

Mandate

Seventeen participants observe the Federation’s mandate is *support for public education and advocacy for teachers and students*. In contrast, one participant remarks that one knew what the teachers’ federation or union was against, but not what it was for. The participant thinks the STF agenda would have contained the motherhood rhetoric and perceived Ontario to be a *déjà vu* with the participant’s Saskatchewan experience (S21).

Two participants note teachers stayed close to the center in designing the organization, adopting policies, and putting at least equal human and financial resources into *both protecting the rights of members and aspiring to professional conduct and competence* (McDowell, 1967; STF, 1952; STF, 2000b; ST18, ST19). Statements from

the early years attest to the dual-purpose philosophy. Lorne Titus, future first STF president (as cited in Robertson, 1983), advocated that teachers “see that the [Saskatchewan Teachers’] Alliance has not something merely to sell but something to achieve” (p. 2). In 1938, Buck observes that as well as doing “much to assist, protect and advise the individual teacher, the Federation realized at the same time that the permanent improvement of the lot of the teacher can only be obtained by solving the larger educational problems with which it is confronted” (p. 71). The STF president in the early 1940s, W. S. Lloyd (as cited in Robertson, 1983), described the Federation as “not a mere mercenary organization existing only to advance the welfare of the teacher, but rather an organization ready and able to advance the welfare of all society” (p. 2).

Four participants observe the STF does well on its mandates (ST18, S60, S70, S91), and the membership is generally comfortable with the dual role (“Splitting not popular,” 2001; ST18). Two participants believe the STF’s unitary structure is less confrontational and promotes a balanced view where the Federation can be in the center of decision making and make progress (ST18, ST19). Some note that the dual mandate enables government and teachers to emphasize what they have in common (ST18, S27, S31, S67). Participants observe that education in Saskatchewan has been better served by one organization with a broad focus that performs both union and professional roles (ST18, ST19, S27, S31, ST58, S67, S91).

Three participants point out the *STF helps Saskatchewan teachers look after themselves, both regarding economic security and professional development* (ST29, ST45, ST58). Participants perceive the STF addresses the concerns of teachers, provides direct service to and earns the respect of its members, and has general teacher support (ST45, ST52, S60). A survey in 2000 found that 78.6% of the membership generally were satisfied or very satisfied, and 2.9% were very dissatisfied (Research and Information Unit). Three participants observe the STF has an impressive array of achievements that governments cannot deny (ST18, S46, ST99). Participants identify the Income Continuance Plan in 1978, and Counseling Services in 1984, as programs with a major impact on the profession. The STF did not wait for government support to initiate these programs (ST18, ST29, ST58). Three participants spoke of the Federation vision of teacher control and willingness to take financial risks, evident in initiating and assuming

responsibility for the administration and investment management of the Saskatchewan Teachers Retirement Plan in 1991 (ST29, ST58, S96).

Participants remark that *the Federation plays a strong supporting role in the professional development of its members* (ST18, ST24, ST29, ST45, ST72, S106) and, in a reciprocal relationship, of teachers internationally (ST69, ST93). One participant perceives the value of scholarship and excellence is demonstrated through Federation awards to teachers in training, professional development supports to groups of teachers, and sabbatical leaves for its administrative staff (S70). Three participants note the Federation led the movement for increased standards in teacher training (Newton, 1994; ST29, ST69, S106). One participant observes that STF professional development initiatives build more teacher authority in the classroom, facilitate teachers learning from teachers, prepare education administrators for a changing environment, respect concepts of adult learning, and support the creation of resources (ST58). Participants observe STF initiatives facilitate *teacher participation in the expansion of knowledge about teaching and learning*. Of particular note is STF support for special subject councils (professional associations), “The Study of Teaching” (Gallén & Bold, 1989), the work of the Saskatchewan Professional Development Unit (SPDU), and the McDowell Foundation (ST18, ST29, ST58, ST69, ST88, ST99). Three participants identify the Dr. Stirling McDowell Foundation for Research into Teaching, established in 1991, as the first initiative in Canada to provide funds for teacher action-research in classrooms (ST18, ST29, ST58).

Strategies

The Federation with 12,000 members, has limited human power and money, participants observe (S70, ST78, ST88). Differentiated staff roles, more introspection, research, policy development, and principles guide Federation work. These strategies help to stretch the resources, create consistency, are sustainable over time, and contribute to credibility, remark participants (ST18, ST19, S60, ST69, ST88, ST99). The manner in which the STF liberates its people to work is key, three participants think; the work is policy driven but there is strong reliance on individual initiative (ST18, ST58, S76). The STF consistently selects its leadership in a way that promotes its values, participants

observe (Robertson, 1983; ST58, S60, S97, ST99). Twelve participants perceive STF leaders use cooperation and democratic decision making to resolve issues. For example, STF leaders share the information and ideas needed to allow people to make informed decisions and wait patiently for change. In describing the establishment of an outreach aboriginal teacher-education program, one participant remarks that STF leadership diffused member animosity to the program. Members were anxious, due to the anticipated impact of the program on employment security. The participant concludes that *when STF leaders see themselves as collaborators rather than adversaries, the quality of leadership also influences the Federation members' attitudes* (see Poole, 1995; S60).

Participants remark that the *STF develops member leadership* knowing that its strength is in its people (McDowell, 1965; STF, 1996a; STF, 1996b; ST52, ST93). Three participants observe that the STF believes in the integrity, knowledge, and professionalism of its members. The STF respects and values the contributions of teachers to the profession in each teacher's community and recognizes that leadership exists everywhere (ST52, ST72, ST105). Participants observe the STF also stands firm on key issues in a way that provides *leadership to its members* and requires members to look in the mirror and change (ST08, ST18, ST33, S60, ST78). Robertson (1983) notes "the Federation's best leaders fought at every turn any propensity shown by members to adopt a smug self-sufficiency and to remind teachers of their obligations as well as of their just demands" (p. 24). Three participants remark it takes a concerted effort to build the values and principles of the organization within the membership; there is a fine line between ascertaining the needs of the profession and providing the appropriate leadership (ST08, ST18, ST19).

Four participants describe a continual balancing act. The Federation both supports the provincial organization policies and recognizes local autonomy (ST34, ST52). The STF both looks after the needs and interests of the members and provides appropriate leadership to maintain the vision (ST18, S60). One participant notes the challenge the Federation has to satisfy members and external partners simultaneously. The participant describes the challenge as a tricky call where there are no rules and the balance must be done project by project. The participant notes two examples where the balance was not

maintained: (a) the development, during the 1990s, of a school principals' professional development program without the support of the trustees, and (b) a tentative agreement rejected by the membership in 1991 (and again in 2000). The participant thinks if the STF keeps erring on both sides, likely, it is doing okay on the whole (ST88).

The STF functions primarily from a role of *influencing* others, state participants (ST08, ST18, ST19, ST69). Teachers take a policy position and then engage the education community (ST19), but are realistic that the organization must strive toward that ideal. Change is unlikely to occur without ongoing effort and some compromise (ST18). STF policy development incorporates research and member consultation to develop teacher ownership. Participants note that the process requires *trust in the democratic process* and *trust in the people who participate* (ST08, ST72, ST84). Participants observe government respects the small-group process at Council that assures the STF annual report to the minister has some foundation in collective discussion (ST18, S37, S47). Council is the annual meeting of elected teacher representatives.

It is far more likely for the Federation to propose strategies at one of the collaborative tables than to undertake them independently, one participant observes (ST29). Four participants remark the STF is adamant that teachers' voice must be part of decision making. The STF has not just adopted collaboration, but has *promoted collaboration*, and held it up as an aim (ST18, ST52, ST58, ST88). *Collaborative relations require a willingness to trust*, observe two people (ST18, ST88). One participant observes *the Federation tries to show by its own actions that the STF is trustworthy* (ST88). Participants observe the Federation practices the values it espouses (S70, S77, ST84) and speaks out whenever the province challenges the values of teachers and their organization (ST03, ST08, ST09, ST44, ST84, ST99). Three participants comment on the Federation's willingness, on most issues, to discuss public policy in a number of forums (S31, S66, S67).

A criticism of the STF is that it does not react or act fast enough, but that, notes one participant, assumes that acting fast is good or would provide the right response (ST84). Avoiding error is a significant accomplishment remarks another; there are a lot of stupid mistakes the STF has not made (ST103). The Federation's success, suggest three participants, has been in timing, the ability to anticipate needs, the resources to act,

and carrying through responsibility (ST58, ST84, ST99). Three others note the STF can lead as long as it is not too far out of the mainstream in what is advocated (ST18, ST19, ST69).

Three participants observe *close political relations but not in a partisan sense* (ST18, S27, S67). Participants note that regardless of the political party, the relations of the Federation with different governments are positive, constructive, and generally stable (ST19, ST29, ST44, ST45, ST58, S70). Even during the strained relations in the late 1980s, one participant perceives the minister mediated relations with the deputy minister (ST69). That does not mean there is agreement, but the doors are open and teachers' voice is heard, respected, and sought out, observe participants (ST19, ST44, S47, ST52, ST58, ST69). Participants remark there is no political label, no government bashing, no financing political parties by the STF, just non-partisan politics (ST52, S67, ST69, S70, ST72). Three participants perceive the Federation is skilled at working with government: The STF is a willing partner, respects the use of the media, and does not sit on the outside and snipe (ST18, ST29, S31). The STF engages in *ongoing efforts to work with and cultivate reciprocal relations with all the political parties*, observe four participants ("Sask Party", 2001; ST19, S31, S37, ST72). The Federation encourages members to be active politically and to support the party of their choice observe two participants (ST69, ST72). Individual and small group political lobbying efforts demonstrate strong membership support for change and affirm that change is not just at the whim of the Federation leadership. Federation members, in 1997, inundated politicians with letters and meetings in support of the STF request for authority regarding teacher collective interestes. In 2000, after narrowly rejecting a tentative agreement, members voted 91% in support of job sanctions to press government for a salary increase.

In spite of efforts by a significant number of teachers to defeat the Thatcher Government in 1971, one participant observes that the STF itself did not take a partisan position (ST69). Two participants believe that teachers are a microcosm of society such that teachers did not vote any differently than the majority of the population in the elections that resulted in a change in the party in power, particularly in 1944, 1964, 1971, 1982, and 1991 (ST19, ST29). In the 1999 elections that resulted in a coalition NDP-

Liberal Government, eight New Democratic Party, five Saskatchewan Party, and two Liberal candidates were teachers (“Teachers well represented”, 1999).

Four participants describe the Federation as a *low key but effective* organization that does not advocate the use of sanctions, but when necessary the STF has been effective there too (ST18, ST52, S60, ST93). Twice since provincial bargaining began in 1973, teachers rejected tentative collective agreements and supported province-wide job action. One participant states matters were resolved through mediation in 1990 (ST29). In 2000, teachers took limited job action for six teaching days before achieving a satisfactory salary agreement. One participant cautions that labour harmony doesn’t necessarily mean the process is working. The participant perceives bargaining as an artificial, ineffective process with signaling and carefully conveying messages (S16).

Cooperative relations produce collective agreements unencumbered by detailed management issues, one participant observes (S66). The agreement at the time of writing is 50 pages (Provincial Collective Bargaining Agreement, 2000-2002). Companion local agreements regarding professional development and working conditions are an additional 12 to 15 pages.

One participant suspects the partner relations cause the Federation to take a more moderate approach (S27). The kind of impact the Saskatchewan partnership has, another participant observes, results in the Federation questioning whether it wants to annoy or anger the government and trustees, and what the consequences of doing that are (ST29). The Federation strategy, note four participants, has a long term view (Robertson, 1983), is policy driven, non-confrontational, not played out in the media, based more on face to face communication, and is quite personal. There is also a strong political action approach that calls on each local association and teacher to be informed on issues and effective in lobbying local government representatives and elected groups (ST18, ST52, S60, ST93).

Nine participants voluntarily contrast the STF’s approach with their perceptions of trade unions. Two participants observe the STF does work that is identical to that of a trade union. However, that is just a piece of the Federation work (ST29, S96). Two participants perceive that unlike the trade unions’ assumption ‘defend’, the STF’s assumption is ‘listen’, and then try to resolve problems (S20, ST104). One participant

believes that the STF looks more at the overall policy than the short-term benefit of the members (S60). One participant perceives that rather than rules about who does what job, in the STF approach, school principals have choices and freedom in school assignments that permit more educationally sound decisions and a personal style (ST45). Two participants observe that there is a focus on students as well as labour issues, a shared concern about Saskatchewan society, and consistent Federation messages publicly and behind closed doors (S31, ST72). Even in bargaining, one participant notes, government is not dealing with a trade union but with a professional organization (S27).

Less mobilization and more involvement in the functioning of society through interorganization collaboration, and participation within bureaucratic structures, are characteristic of the means that political unionism employs to address discontent. In the preliminary typology, political unionism is anticipated in partnership with an institutionalist state that exemplifies progressive social forces.

Government and Federation Relations

Sixteen participants describe generally *healthy, positive, respectful, and constructive relations* between the government and the STF and within the education community. Several participants observe *relations change with different political parties* in power (S60, S67, ST72, S76, ST78). One participant perceives relations between the STF and the Conservative Government in the 1980s was cordial but not close. The Federation achieved changes to its own Act in 1997 that, in the opinion of the participant, would not have been possible with the Conservatives (S76). Participants observe there is more common ground resulting from a higher degree of teacher influence on NDP policy (S16, ST22, S27, S60, S66, ST69, ST72, S73). However, the NDP Government has done things to which the STF is vehemently opposed, note two participants, who declare that ‘nobody is in anybody’s hip pocket’. Recent examples include the NDP decision to participate in the national standardized testing program and the development of provincial policy that is not endorsed by the STF, regarding the provision of medical services to students by teachers (S27, S31). One participant questions if governments can

take any political support for granted (ST55). Two participants caution the Federation not to be complacent that historical relations will endure (Robertson, 1983; ST18, ST29).

Thoughtful is how one participant describes the government and Federation relations in Saskatchewan. The participant perceives the relations do not happen by chance; people in government and in the Federation think through issues and make deliberate moves as a result. The participant notes there are both educational and political purposes. On national standardized testing, the Federation was sticky but not in ‘a big noisy way’. The participant observes concern about being jeopardized elsewhere or about appearing too cozy in a relationship. The participant remarks there is some balance that comes out of thinking issues through rather than hard negotiation (S76).

Collaboration

One participant points out collaborative relations are a form of reciprocal relations where teachers need to educate government and government needs to educate teachers. Collaboration is an important part of how education operates and is important to success in schools (ST45). Another participant observes the education community and the provincial government of no matter which political stripe have prided themselves for two decades or more on Saskatchewan’s distinctive collaborative approach (S67). Analysis of data collected for the study, *The Saskatchewan Teachers’ Federation: Issues then and now* (Humphries, 1997), produces eight broad factors that contribute to collaboration in the education sector in Saskatchewan. Data collected in 1999 affirm and expand on the factors.

1. *Twenty-nine participants identify values that are shared* by several other participants. *Shared values* provide a foundation for collaboration (see Bacharach & Mundell, 1993). Participants believe Saskatchewan operates on the fundamental and deeply engrained belief that society has responsibility for public education and that teachers, trustees, and politicians *work together* to ensure the Saskatchewan public education system works and works well (Calder, 1955; STF, 2000-2001). Participants observe that the advocates in education, (that is, parents, the controllers of finances, and the service providers), have a *common focus on the young people and education, a focus*

on teaching and learning, that provides consistency. Participants uphold collaboration and the importance of relationships. The number of Department officials and Federation staff who hold doctorates of philosophy (see Appendix B) is also indicative of the value placed on education generally in the province. Participants understand that economic welfare and professional issues are integrated, that addressing teacher needs furthers the cause of education, and that the partner organizations have a commitment to their members as well as to education.

2. *Twenty-five participants note the supporting role of structures*. Structures ensure continuity, support relationships, and contribute to consistent values and principles, one participant notes (S08). Reciprocal *advisory* structures facilitate cross-fertilization that works to benefit both relations and education, comments another (S77).

Legislation brought changes to *bargaining* structures: in 1949 formalizing local collective bargaining, in 1968 imposing area bargaining, and in 1973 introducing bi-level bargaining. In 1968, *STF strategy regarding collective bargaining legislation rested on the belief that legislation was likely, and teachers needed to stay at the table and participate in its preparation*. On points of disaccord, government could impose unacceptable items, but only over teachers' strongest protests (S. McDowell, personal communication January 5, 1968). The STF actively sought bi-level bargaining (S. McDowell, personal communication September 17, 1971), a change that some participants attribute to the 1971 provincial election (S37, ST58, S67, ST69). The bi-level structure places employer negotiating responsibility with government and boards of education for salary and benefits provincially, and with boards of education for professional development and working conditions locally. Two participants note the structure recognizes teachers need equitable treatment regarding their security and unique solutions to local conditions. The closer decision making is to the impact of the decisions, the more likely decisions and decision-making processes meet the needs of the people (McBeath, 1967; ST34, ST52). Participants perceive that bi-level bargaining gave the Federation a strong voice in dealing with the public and government (ST09, ST19, ST52, ST69, ST99). In part, teachers and the STF could give more *attention to issues other than bargaining* observe participants. In part, note two participants, the structure enabled teachers to talk to those holding the purse strings. There were few disputes provincially

and the relationship facilitated relations among the organizations on other matters (ST29, ST58).

3. *Twenty-three participants remark on the role of organizational and individual conduct to sustain collaboration.* Participants speak of practices such as seeing both sides, questioning, being consistent, democratic, open and inclusive, leading, maintaining integrity, risk taking, and *willingness to trust*. The conciliatory STF attitude at the first provincial bargaining table fostered greater influence in education affairs at a variety of committee tables, one participant remarks (S97). J. Friesen (personal communication, April 5, 1973) proposes the STF “must make haste slowly if Bill 80 is to benefit teachers in the long run” (p. 1).

We will have to establish an ‘instant tradition’ with 1973 bargaining . . . that means coming in with a very reasonable, completely justifiable asking package for 1973. We should make them an offer they can’t refuse. (p. 2)

Two participants observe the consistent and focused nature of the STF governs relations with government (S27, S76); another remarks government treats the Federation like a professional organization (ST29). Two participants note the Provincial Auditor (1998) examined the Saskatchewan Education Indicators Project, commended the Department for a public accountability system shared by the parties in education (S66, S67) and concluded *perseverance, continuity, a firm foundation, and trust* made the indicators program work. One participant finds the Auditor’s observation is broadly applicable to relations in the education community (S67). One participant observes business in education relies on individuals behaving in ways that support collaboration (S76). Participants observe that relations ebb and flow, or change dramatically according to individual people (ST52, ST69, ST78). Relations are also dependent upon the issues (ST18, ST29).

4. *Eighteen participants observe a very personal dimension to relations in Saskatchewan.* *Community connections* and *long term relations* bridge tensions, impact on decision making, facilitate access, and build the capacity to solve challenges before they become problems (ST18, ST22, ST29, S70, S76, ST104). Three participants note relations are built on *mutual respect* (ST19, ST58, S77) and supported by people in government who understand education and teacher aspirations (ST19). Participants

remark on the *ease of access* to politicians including the Premier, regardless of the party in power. There is access to the Department officials (S16, ST29, ST52) and STF staff (S27), and scheduled informal interorganization meetings of leaders (S10, ST29, S107, S108). Two participants think the protocol among the education organizations to invite each other to attend and make speeches at the annual meetings, helps Saskatchewan be more efficient and less disruptive in committee work (S27, S60). One participant observes that culture breaks down where there is no symbolism to bring it together (ST08). In the economic sector, Fukuyama (1995) finds “the ability to cooperate socially is dependent on prior habits, traditions, and norms, which themselves serve to structure the market” (p. 356).

5. *Eighteen participants speak of the importance of process and process skills.* Participants mention resolution by consensus rather than might. Effective processes invite participation in joint problem solving, demonstrate patience for change, find solutions to challenges before a problem exists, develop leadership, and keep the public on side. The change process is particularly important regarding professional issues. One participant thinks it important that both government and the Federation understand they are trying to change the interactions between teachers and learners, so that curriculum reform can be actualized in classrooms (S77). Two participants note change is a decision that individual people make as they come to a requirement for action. Leaders demonstrate the change is necessary and worthwhile, and people need opportunities to explore change that is requested, and value the change before they make the change (ST08, S77).

Participants identify *a norm to get around the table, focus on the issues, listen, talk, identify concerns, set goals together, and find solutions together*. Several participants perceive the *consensus partnership approach to policy development sends a powerful message to politicians* no matter what stripe, and creates a direction and momentum that is not subject to political whim.

6. *Sixteen participants identify economic factors* such as committing resources, limited resources, prioritization of resources, being stewards of resources, and combining resources, as a motivation for collaboration. Due to lack of resources in the Federation and the Department, note two participants, the 1990s have seen a move away from

interorganization advisory committees (S77, ST78). Participants recognize the STF pays its cost of participation on a variety of Department committees, putting pressure on both financial and human resources (S31, S70, S77, ST78, S97). The STF cannot renege on the provincial obligations, notes one participant. In part, there is a statutory duty, and in part, the STF cannot remove itself from the theatre of power (S70). The will to participate is countered, note two participants, by a reduced teaching force, pressure to cap fees (S70, ST78), and a membership call for prioritization of teacher interests (ST78).

Participants observe the economic down-turn strains relations (Humphries, 1997; SK Ed, 1992a; ST22, ST45), places a focus on the employer-employee relationship, and drives the STF union aspect more to the fore (ST01, S60, S70, S76, S109). The 1990s saw public sector wage restraint legislation in all provinces except Saskatchewan (“CTF summary”, 1996). Saskatchewan teachers voluntarily¹³ reached collective agreements during 1992 to 1996 that saw salary freezes in three calendar years in tandem with increased taxes generally for Saskatchewan residents to control the provincial deficit and debt. In 2000, teachers used sanctions to insist obligation in the partnership be two-way. Member calls for reviews of STF governance and bargaining methods demonstrate the precarious balance between member and partner relations.

7. *Fifteen participants identify political factors*, such as stability of STF politics and teacher activism in provincial and community politics, as keys to collaboration. Elected STF executive members are still in, or in close touch with, the classroom. The STF president is full time in office for one or two years (ST93). Also, observes one participant, the STF has had six General Secretaries over an almost seventy year span. Their personal influence, backed up by the organization, creates and maintains respect (ST99). *Saskatchewan is a very political province and the STF is very political*, comments one participant (S91). One participant perceives continued political influence is important for the future of the STF and teachers’ collective welfare (S31). One participant notes a two-way attitudinal effect: Organized teachers accept more of what politicians say if there is *respect* and *trust* (ST19).

¹³ In parallel in the economic sector Fukuyama (1995) notes “German labor unions have not taken strongly protectionist positions to defend declining industries and generally have behaved in ways that management

8. *The importance of knowledge is apparent in eleven participants' comments.* References to knowledge include respecting teacher knowledge of education and knowledge of kids, seeking advice from the aboriginal community, inviting attendance at meetings, and informing others. Participants believe the fact that organizations are not caught by surprise keeps relations healthy (ST29, S47) and demonstrates a kind of maturity characterized by openness (ST69, ST72). People are not trying to hide their agendas observes one participant; people allow their ideas to be strengthened by the ideas of others (ST69). There isn't a vacuum of information -- there is ongoing dialogue, both formal and informal, both collective and individual, observes another. Teachers talk to their MLAs, to their local officials, and to trustees (ST52).

In summary, several factors contribute to collaborative relations in Saskatchewan. Shared goals for education, strong (Federation) values, a focus on process rather than position, and supporting structures are consistent with American teachers' experiences as previously noted (p. 90, see Payeur, 1994). Personal relations and organizational conduct, non-partisan and stable politics, pooling resources, respect for expertise, and the sharing of knowledge also contribute to and sustain collaboration. *Collaboration exemplifies political rationalization of political action anticipated in partner relations.*

would consider responsible. There is, in short, a much higher degree of mutual trust between labor and management in Germany than there is in less communally oriented societies" (p. 216).

Partnership

Seven participants think the term ‘partnership’ signals the intent to work together and share resources, minimizes tensions, facilitates change, and recognizes that people must negotiate and advocate but not with rigid lines drawn (ST29, ST52, ST58, S60, S66, ST69, S76). As discussed (page 90), Jouen (1998) identifies three principles essential to an effective partnership: *independence, legitimacy, and substance*. Participant comments account for all three principles in relations in Saskatchewan.

1. Each organization has a unique ‘raison d’être’ and a need to balance the internal membership and external organization relationships. Hence, as eleven participants observe, the *partnership does not exclude independent actions*. One participant emphasizes compromising values and principles are lines that cannot be crossed (ST84).

2. Four participants note that turf-sensitive issues such as student medications, national testing, 1997 legislative changes, and collective agreements, do not have the full support of all the parties. The opposition is respectful; there is *an ability to disagree on an issue without colouring relations in other areas* (S27, ST29, S67, S76, S77). Three participants note joint leadership to maintain relations. Over time and on different issues, different organizations facilitate *problem solving* (ST29, S69, S76).

3. Two participants observe the partners are *genuinely* interested in problem solving what is best for education (S67, S77). Participants note the organizations learned that *with participation come momentum and more influence, because the synergy creates a stronger force than separate agendas* (ST18, S27, ST29, ST45, S67, S76). Participants observe a great deal of expertise and creativity in the system to innovate and to engage in change positively without destabilization (ST18, S37, S66, S70, S76, ST102).

Some participants emphasize the positive relations by describing what does not occur. There is no teacher bashing, no STF mandate to take on the government, no sense of fear of government, or threat from the union (S70, ST72). Others notice there is no use of controversial news for partisan advantage (S67) and no hidden agendas (ST69). Shortcomings of collaboration are far fewer than the alternatives to collaboration, thought four participants (S27, ST29, S66, S70). One participant observes that when the

employee has a say in conditions of employment, whether conditions are good or bad, affects the way one feels about and does a job (ST102). Fukuyama (1995) notes “even if productivity was equal between low- and high-trust factories and offices, the latter are more humanly satisfying places in which to work” (p. 356).

Outside pressures change the nature of the dialogue, observes one participant, because there are forces over which Saskatchewan has no control (ST78). Nine participants speak of the *changing student demographics* (Kouri, 2001). Fourteen participants observe *an increasingly more social than educational school role* (Robinson, in press; Tymchak, 2001; STF, 1996a). Participants also note resources limit the capacity to respond to both the traditional and new needs (Kouri, 2001; S37, ST58, S70, S77).

Two participants believe in a provincial agenda for education but within a national context (S47, S60). Important *values not experienced in other provinces cause Saskatchewan to perceive the national agenda as a threat*, observes one participant (S60). General Secretary Fred Herron (1991, 1997b) expresses the need for the merit of education indicators to be judged on the potential to benefit students and teachers in the classroom and to account for contextual factors in variations among jurisdictions. Herron points out the limited opportunity for student, parent, trustee, and teacher voices to contribute to a vision of education for Canada.

Institutionalized social relations of collaboration and participation are characteristic of an institutionalist state and provide avenues for the expression of political unionism. Participation and regulation by trust, lived and experienced as mutual trust, are essential to partner relations in the preliminary typology. Five participants observe the relations in Saskatchewan create interesting tensions both within the teachers’ organization and in the relations among organized teachers, government, and education organizations (ST18, ST34, ST52, S60, ST88).

Education Reform

Eight participants perceive the 1980s-1990s curriculum and instruction review as significant change in education in Saskatchewan (ST29, S31, ST35, S37, S60, ST72, ST78, ST88). Ongoing curriculum reform, sustained through changes in the political

party in government, is the hallmark of the partner relations in Saskatchewan (S77). As well as educational knowledge, reforms in governance and accountability are considered.

Educational Knowledge

Education goals and goal- and policy-setting processes are factors considered regarding the theme, educational knowledge. Curriculum development is also discussed.

Education Goals

One participant identifies that the motivation for reform was the public sensing that the system was not meeting their expectations. The participant notes the same questioning of education in Ontario in the 1990s and observes that if the fundamentals are so glaring that every province deals with it sooner or later, then the change transcends politics (S21). However, another participant attributes quantum change in education to a number of factors. The participant notes the lack of success in non-cooperative education ventures in the late 1970s, participation of the education community in the review from the beginning, a very public review process, and a challenge to the collaborative model (S37). The latter opinion is supported as follows.

In 1981, representatives of the public interest and educators formed a Curriculum and Instruction Review Committee (C & I Committee). The C & I committee conducted the review of education in the province (Saskatchewan Education (SK Ed), 1991). The Committee involved the public, commissioned studies, and used a group problem-solving approach. The C & I Committee found 80% of respondents supported how schools develop student social and academic skills. Two participants also observe the public noted the rapid changes in society and had an eye to the future (S70, S77). Seven participants identify the strong public support for a broad-based liberal public education for all citizens in the province (SETE, 1994; SK Ed, 1992a; S27, S37, S60, S66, S70, ST72, S77). The Committee set new education goals, developed a policy framework, and established a curriculum review cycle (SK Ed, 1992a). The final report '*Directions*' (SK Ed, 1984) set the course for education reform and continues to guide curriculum development in Saskatchewan (Robinson, in press; S77). Cochrane (1987b) argues the

consultation process was shallow and served a political purpose rather than ensuring rigour in setting education goals. Eight participants strongly believe the public consultation and ownership is a contextual element that is a real definer and the rudder of the entire curriculum reform movement (S27, ST29, S37, ST52, S60, S70, ST72, S77).

Eight participants observe the government engaged in the review at the encouragement of teachers (Robinson, in press; ST01, S31, S37, ST58, S60, ST69, S70, ST105). In the late 1970s, observes one participant, people at the Federation wanted things to change but not necessarily to something specific, so the parties could work together on the solution (S37). STF policy adopted in 1972 recognizes “the basic responsibility for determining broad aims of education resides with society” (STF, 2000-2001, p. 37). In 1981, the STF General Secretary counsels, “if [teachers] are wise they will accept, and even create, devices for ensuring an integration of their educational goals and objectives with the needs and wishes of society” (McDowell, p. 2). The curriculum *change proceeded as a partnership among all of the parties in the education community* and has been an incredibly strong voice, think seven participants (S31, S37, ST52, ST58, S76, ST88, ST105).

The review of the provincial education system coincided with the effective schools movement worldwide, observes one participant (S77). Saskatchewan education goals were identified and described, relying on a tool provided for that purpose by the Association for Supervision and Curriculum Development (Cochrane, 1987c; ST29). Cochrane alleges the goals were plagiarized. Klenz (1987) observes that

while the Saskatchewan education system has been consistent in following such trends as they appear, grow, and dissipate, *Directions*' emphasis on social responsibility and affective knowledge (in a time when “back to basics” and a conservative view prevails) is somewhat unique. . . . If the emphasis is significant, it would require us to look at education primarily as a moral, rather than a technical, endeavour. (p. 204)

Klenz notes the goals create “new obligations for instruction and evaluation” (p. 204). Policy development regarding these two areas is considered in the following section.

Although there was a radical change in government from NDP to Conservatives in 1982 and another change from Conservatives to NDP in 1991, the changes had little impact on public education, observe participants (SK Ed, 1992a; ST18, ST24, ST29, S67,

ST69, S70, ST72, S76). As noted, changes in government philosophy and personnel in 1986, created strife that strengthened collaborative relations among the other partner organizations.

An institutionalist state promotes participation in the functioning of society. Participation and interorganization collaboration characterize political unionism. An institutionalist state and political unionism characterize partner relations in the preliminary typology.

Education Policy Setting

Participants observe the partnership has some fluidity and flexibility. One participant notes there are three main partners¹⁴ always at the policy table: the Department of Education, the Saskatchewan Teachers' Federation, and the Saskatchewan School Trustees Association, but their role varies depending upon the issue (S37). At the end of interorganization committee work, partners usually all agree on a report and recommendations or guidelines, note participants (S27, S66, S67). Three participants identify teacher involvement in administering medications to students as an exception. On the medications issue, the teachers left the discussions (ST29, S31, S66). One participant notes teachers are concerned about liability and believe that giving medication is not their role (S31). Generally, observe participants, although government has the authority to introduce and change legislation (S27, S67) it is unlikely Saskatchewan would change education policy without the support of teachers (ST19, S27, ST29, S31, ST34). One participant thinks you can envisage a school system without trustees or administrators but not one without teachers. Hence, the participant believes that you must give great weight to teacher opinion (S31).

Directions' (SK Ed, 1984; SK Ed, 1992a) recommendations proposed the *establishment of a core curriculum and a review of evaluation procedures. Interorganization committees recommended policy for both. The Core Curriculum Policy Advisory Committee first met in 1985 and based their work on *Directions*. The Advisory*

¹⁴ Other prominent organizations include the League of Educational Administrators, Directors and Superintendents (LEADS), the universities (The College of Education at the University of Saskatchewan

Committee considered both process and content *to shift the curriculum focus from traditional subject content to a focus on student learning* (Robinson, in press). One participant observes attention to student diversity, inclusion, and continuous progress required a variety of instructional approaches. The participant notes the foundation of core curriculum and its implementation evolved from the literature, best practices in the early 1980s, and major studies of school success in managing change (S77). The core curriculum consists of six common essential learnings (CELs), seven required areas of study, and an adaptive dimension. Students across all age and grade groupings develop a broad range of skills applicable across subject disciplines and life's challenges. One participant notes every school division must follow the provincial curriculum, but may modify up to 20% of what students learn with local options to address community interests and adaptations to meet student needs. Resource-based rather than text-based learning (S77) facilitates such adaptations and offers the opportunity to maintain a relevant curriculum over time.

One participant believes the collaborative process caused the wrong prioritization of issues and controversial issues such as academic attainment and output measures were swept aside (S21). Attention to evaluation followed the restructuring of the curriculum. The interorganization review of *Directions* (SK Ed, 1992a) recommended priority be given to assessing the education system's effectiveness. Indicators help the analysis of whether the system is meeting its goals and identify trends that impact on education. The jointly developed Saskatchewan Education Indicators Program is broadly based and uses *a variety of context, process, and outcome* indicators to look at the education system and the attainment of student and system goals (SK Ed, 2000a; STF, 1993; S27, ST29, S37, ST58, S67). One participant lacks confidence in the indicators program, believes there is not enough external assessment of the education system, and identifies the need for more objective assessment that respects teacher professionalism (S47).

Curriculum

J. A. Calder (Calder, 1955), Commissioner 1905-1909 and then Minister of Education 1909-1912, appointed an Educational Council in June, 1906 to "receive and

and The Faculty of Education at the University of Regina), the Saskatchewan Association of School Business Officials (SASBO), and the Saskatchewan Association of School Councils (SASC).

deal with proposed changes in the courses of studies for public and normal schools and in general regulations of the Department” (p. 9). Beginning in 1908, the Educational Council was “advised by regular educational conferences of government officials, teachers, school inspectors, and school trustees” (Gallén, 1997a, p. 1). Both the provincial trustee and teacher organizations have their roots in the annual education conference.

Government collaboration with teachers regarding the education program is closely linked with the CCF 1944 appointment of Henry Janzen as provincial curriculum coordinator. Lyons (in press) notes Janzen, former teacher, school principal and chair of the STF Curriculum Advisory Committee 1942-1944, established a *broad community based curriculum advisory committee* and a *steering committee*. Recommendations from teachers participating in the STF Curriculum Advisory Committee, established in 1942, and teachers enrolled in university curriculum courses, beginning in 1952, enhanced the two permanent committees’ work (Calder, 1955; Lyons, in press; Robertson, 1983). Liberals defeated the CCF in 1964 but retained Janzen and the structures he had initiated, reinforcing the culture of collaboration regarding curriculum. Lyons suggests *teacher involvement enabled teachers to experience curriculum as dynamic, encouraged adaptations to make curriculum relevant to students, and gave teachers confidence to make changes rather than treat curriculum as an immutable prescription by authorities*.

The development of curricula, guided by the insight of the Core Curriculum Policy Advisory Committee, lasted from 1987 to 1998. The Department advertises for curriculum writers from among active teachers. Teachers apply care of the STF. However, the Department makes the final selection from the names forwarded. Also, teachers identified by the Federation serve on curriculum advisory committees with representatives of other organizations. The Federation respects the expertise and leadership of individual teachers and ensures representatives are informed on organization policy, as issues arise. The advisory committees participate in a cyclical model of program evaluation, design, implementation, and maintenance guiding the work of the writers. Since 1996, renewal continues in an ongoing interactive approach. Updates, links to additional resources, and teacher feedback to the Department can continuously be incorporated in the “evergreen” curriculum that teachers access on-line.

(SK Ed, 2000a). Thirteen participants highlight the dynamic involvement of teachers at every stage: conceptualization, design, pilot projects, and actualization of curriculum (McConaghy, 1990). Three participants believe the 1980s curriculum review supported professional development (ST18, ST29, S106).

One participant, a curriculum writer, observes that in working with teachers there was a transformation of the way the material was conceptualized. The curriculum writing changed to integrate what teachers actually use in their classrooms: links to other aspects of the subject and other curriculum and the process of development of concepts (S60). One participant thinks the Federation seems to talk less about teacher autonomy and wondered if Saskatchewan may have found a different language, *the language of participation* (S76). Three participants observe that *teachers working with the core curriculum come to recognize and appreciate the professional latitude to make their own choices knowing what is in the best interests of their students* (STF, 1992b; ST34, ST55, ST105).

One participant thinks the curriculum development process may have eliminated government bias, but may still reflect a teacher organization orientation (S47). Another participant observes the collaborative policy approach creates a holistic view and ensures the curriculum is a product of the whole society. The curriculum does not belong just to the Department or university subject experts or the school system (S60).

One participant thinks Saskatchewan consistently developed good curriculum but was not sure the province could determine that the curriculum was actually delivered (S47). One participant notes Saskatchewan depends upon continuing education and teacher education programs to bring about a change in the profession (McConaghy, 1990; Robinson, in press; ST29). Curriculum implementation is supported with inservice from the Department and the STF. Boards of education are encouraged to allow the time (SK Ed, 1992a; ST22, ST55, S77). *Directions* (SK Ed, 1984) also recommended additional funding and projects to support education reform. The Education Development Fund established in 1985 committed additional resources for ten years to finance initiatives for the improvement of education. In addition to funding provincially initiated projects, grants were provided for learning resources, efficiency measures, and program improvements initiated locally (Langlois & Scharf, 1990). Provincial projects to support

education reform included the establishment of three special units at the two universities and the STF: instructional development and research (SIDRU), leadership (SELU), and professional development (SPDU) (Robinson, in press; SK Ed, 1992a; ST18, S77). For ten years, the government co-funded the units with the host organization.

A curriculum evaluation program annually monitors different required areas of study in K-12 education. This process is used to renew curriculum, to enhance teacher skills, and to report to the public (SK Ed, 1991). Three participants note that even in Saskatchewan where teachers are involved and the teacher organization is on-side there are still gaps in actualization due to natural resistance, lack of teacher training, lack of resources and time, cutbacks in support structures, and some top down approaches (ST24, ST29, S60). One participant observes that in any change process, there is a broken front (S77). In Saskatchewan, there are differences in the willingness and the ability of boards of education and teachers to make the requested changes.

An education agenda and curriculum that are products of the society suggest an institutionalist state characteristic of partner relations in the preliminary typology. Teacher union participation in interorganization collaboration and the teacher as a reflective practitioner who applies knowledge in tandem with judgment are also anticipated in partner relations.

Governance

Significant attention paid to the governance of education such as school councils, bargaining structures and processes, and restructuring, demonstrate the health of the system observes one participant (ST29). Not all of the reviews have resulted in change.

Restructuring

Two participants identify the 1940s restructuring as a fundamental education reform in the province. The participants note that the move from 5,000 individual school districts to roughly 100 in total rural and urban school divisions was made in consultation with trustees and teachers (Archer, 1980; ST69, S76). The reorganization provided teachers relief from domineering boards of single schools with a single teacher, offered administrative efficiencies, and equalized rural and urban education opportunities for students (Robertson, 1983). One participant believes Saskatchewan education is again over-governed (S66). However, government has not mandated consolidation of boards of education in the 1990s, observe participants (“School board”, 1998; STF, 1997b; ST29, S31, ST58, S66).

Decentralization

One participant describes a *balance between centralized and decentralized governance responsibilities* in Saskatchewan (S77). Three participants identify the drivers of decentralization in Saskatchewan as a combination of local control and involvement and concern for the survival of the community (ST69, S70, S76). Two participants note greater local control than in other provinces, where governments could centralize decision making in every aspect, without the serious political ramifications anticipated in Saskatchewan (ST69, S76). *The Education Act, 1995* governs structures formally, but boards of education, that is, people elected every three years who represent the school districts or communities in each school division, determine how funds are used. Local School Advisory Councils in urban settings, and elected district boards of trustees in rural Saskatchewan, guide the school program. Teachers and other school employees are not eligible for election at either level of governance.

Saskatchewan twice considered and bypassed the creation of school councils, the trend for parents and other citizens to have more influence on schools. The *Langlois and Scharf Report on School Finance and Governance (1991)* recommended replacing district boards of trustees with school councils comprised of parents and professional staff, to attend to school operations and to advise the boards of education. Also, four participants observe that Saskatchewan residents, after public debate about school

councils in 1997, decided the structures in place were appropriate (“School councils”, 1998; ST29, ST55, S66, S70).

One participant observes a coexistence of constitutionally protected education interests, including Roman Catholic separate and public education, and Hutterite schools that have chosen to maintain their identity under public administration (S67). Two participants note the restructuring of governance in 1991 to accommodate the francophone constitutional issue (Scharf & Langlois, 1994; ST29, ST94). The education partners also worked with special interest groups to develop a legislated framework enabling independent schools to access public funds (ST18, ST29, S67, S77).

Funding

One participant notes *the power of Saskatchewan school divisions to tax property gives meaningful local control* (ST69). Saskatchewan is the only provincial government in western Canada that does not tax property (SK Ed, 2000b). The Foundation Operating Grant ensures that boards with less ability to raise local funds through the property tax receive more from the province (Langlois & Scharf, 1990; Saskatchewan School Trustees Association, Saskatchewan Teachers’ Federation, Saskatchewan Association of School Business Officials, and League of Educational Administrators, Directors and Superintendents (SSTA et al.), 1998; ST69, S77, ST78, S107). The Foundation Operating Grant determines only the distribution of a fixed amount set annually in the provincial budget. The distribution is based on enrollment in combination with special factors. There is growing public resistance to increased property tax (SSTA et al., 1998; Lang, 2001). One participant perceives the arrangement places heavier burdens on residents in some communities and disregards individual ability to pay (see also Langlois & Scharf, 1991; ST22). Budget decentralization to schools is also forcing the issue of fund raising observe three participants. There is a mismatch between classroom needs and budget limits and greater leeway to do fund raising than existed thirty years ago (Nielsen, 1999; ST24, ST34, ST44).

Participants identify the lack of funding and resources as a major problem (SSTA et al., 1998; STF, 1997b; ST22, ST34, ST52, ST55, ST58, S60, S76). The province is on the horns of a dilemma, in that Saskatchewan has a small economic base to support an

aging population and the increasing aboriginal population that contribute proportionately less to the tax base (S16, S70, S76). Two participants note teachers are resourceful and generally the education sector prides itself on the ability to manage, so there is nobody crying deprivation for education. However, the participants note, that reduces the education sector's influence (ST34, S70). Provincial funding accounted for 40.4% of school division expenditures in 1999-2000 (SK Ed, 2000a). In 1998-1999 per pupil expenditures were \$5,817CND accounting for 22.7% of GDP per capita (SK Ed, 2000a); the pupil teacher ratio was 16.3. In 1995, K-12 education represented 8.6% of total public expenditures in Saskatchewan (SK Ed, 1999; Statistics Canada & CMEC, 2000). Four participants remark on the significance of two joint submissions to government by the partner organizations to seek a higher level of provincial funding for education (SSTA et al., 1997; SSTA et al., 1998; ST19, ST22, S60, S70).

The partners perceive inadequate provincial funding threatens democratic decision making and accountability and jeopardizes the inclusive, responsive, and community-oriented school system (SSTA et al., 1998). The STF (2000a) expresses concern that the “most fundamental principles of public education, the principles of equality and universality, are not being upheld within the education system” (p. 2). An interorganization committee recognizes growing disparity in fiscal capacity among school divisions. The External Reference Committee (2001) found basic per pupil rates that are set at 75% of recognized expenditures and unconditional provincial funding support a balance between local autonomy and provincial leadership. However, the Reference Committee recommends increasing provincial funding closer to boards' actual total operating costs and increasing the equalization factor closer to the actual average tax rate to improve program equity.

The preliminary typology anticipates partner relations foster participation and apply a combination of centralized and decentralized decision making. The structure intended to redistribute wealth with equalization payments to enable local autonomy and consistent quality, reflects a social democratic philosophy. An institutionalist state that is characteristic of partner relations facilitates the market and corrects market extremes.

Accountability

Saskatchewan enjoys public satisfaction with schooling (French & Johnson, 2001; S27, ST52) among the highest ratings in Canada (“How do Canadians grade the schools”, 2000; ST29). Public support is ongoing (Tanka Research, 2001). Saskatchewan has a low 2% participation rate in home schooling and independent schools not associated with the public system (SK Ed, 2000a; S27, ST29, ST52). Satisfaction in, and the use of, public education, lead one participant to believe that the Saskatchewan system has ownership and commitment built into it (ST29).

Teacher Certification and Conduct

Consistent with the recommendation of the Ad Hoc Committee on Professionalism (STF, 1997b), four participants believe the capacity to certify and decertify teachers should belong to the profession (ST29, S60, ST93, ST104). Former STF General Secretary Gib Eamer (1967) voices his vision for teacher responsibility to the profession:

We are 100% employed. . . . I have never been interested in building a teaching profession patterned after any other one, but one that was built to meet the needs of our own membership. One of the needs of our own membership is again this business of confidence in yourself and of responsibility. Not because the Minister can cancel your certificate, but because you have an obligation to the profession and to your colleagues within this profession. This to me from a teacher point of view is the important thing about disciplinary powers. The other thing that is important to me about disciplinary powers is that teachers or any professional group should be prepared to accept responsibility for policing its own profession. (p. 31)

One participant believes the government has tolerated if not fostered the involvement of teachers in teacher certification and the move for the Federation to take over certification responsibility (S70). Another participant observes the province does not support Federation authority for certification because the change is troublesome for the stakeholders, is a resource issue, and is also an issue of mobility related to the harmonization of professional standards across Canada (S60). In response to a 1992 STF proposal regarding STF responsibility for the certification of teachers, the Department (SK Ed, 1992b) begins:

Saskatchewan has a tradition of self-regulating professions. . . . The STF proposal fits within this context. . . . Because the STF performs both [professional and bargaining] function[s] on behalf of teachers, the STF proposal raises unique issues . . . which involve matters of concern to the education community as well as ones of a more technical legal nature. (p.1)

In spite of the perceived barriers to the self-regulation of the teaching profession, teachers in Saskatchewan have input into the certification of teachers in two significant ways. First, the Board of Teacher Education and Certification (BTEC) has operated since 1964 on the *cooperative model*, notes one participant, although the legislative authority regarding teacher preparation and certification rests with the government (*The Education Act, 1995*; Lyons, in press; S60). Second, teacher education field-experience programs ensure the profession has some input into the selection of teachers, and thus input into the certification of teachers and the quality of its members (Robertson, 1983). STF policy, adopted in 1963, led the way to field-experience programs that, participants note, recognize *professional responsibilities for teachers-in-training* (Genge, 1988; Lyons, in press; STF, 2000-2001; ST22, ST24, ST44, ST45, S60, ST104). Participants observe the practicum, required for certification in the province, makes a positive contribution regarding the quality of teacher education and the nature of teaching (Genge, 1988; ST22, ST45, S60, ST69, S106). Participants note the field experience brings theory to practice (S60), models and transmits values and beliefs, and is a learning process for both cooperating and student teachers (Lyons, in press; Richert, 1967; Soresstad, 1963; ST22, ST24, ST44, ST104). Over one thousand teachers serve annually as cooperating teachers (SK Ed, 2000a). One participant believes the field experience, designed without stipend (Richert, 1967), is sound teacher education and visionary social policy (S60). Two participants observe that the cooperation of boards of education, the universities, the government, teachers, and the teacher organization to implement practicums, speaks highly of the program in itself (ST45, S60).

Both the teacher organization and boards of education have responsibility for teacher conduct. Provisions regarding teacher conduct are discussed later in this chapter.

Teacher Appraisal

School inspectors became superintendents in 1940 to assist teachers to improve instruction (Robertson, 1983). One participant recalls the move in the early 1970s from provincially employed superintendents to locally employed directors of education (S97). Three participants indicate supervision and evaluation policy is specific to school divisions, and hence there is a mix of approaches (ST22, ST29, S66). One participant observes Saskatchewan promotes a model that places a professional onus on teachers: What do you need to work on, what can you do, what can be done together? Complaints regarding teacher competency may be directed to the Federation. When the termination of a teacher contract for reasons of teacher competency, is upheld on appeal, an automatic referral is made to the STF. The STF professional authority is discussed later in this chapter.

Student Evaluation

One participant notes that policy discussions try to keep the focus on authentic assessment and evaluation for students (SK Ed, 1992a; ST78). In 1956, the STF initiated discussion on teacher evaluation of all students at all grade levels including school leaving (STF, 1992a). Kolenick (1964) notes that individual *teacher accreditation* acknowledges teacher capacity developed through training, personal responsibility, the teacher-pupil interaction, continuous evaluation, the direct relationship of evaluation to learning experiences, and improvement of the professional status of teachers (see also STF, 1992a). Two participants recall that the accreditation of teachers began in 1965 with the greater emphasis on laboratory work in the sciences. Teachers insisted one exam at the end of the course was not fair to students. Agreement was reached that 50% of the student mark would be from teacher-evaluated work through the year. The next step, the participants note, was the final exam could be set by the teacher provided the teacher met certain criteria, (that is, a major in the subject area, two years teaching experience in the major, support of the employing board, and participation in an STF sponsored accreditation seminar). An interorganization committee established the criteria in 1971 (STF, 1992a).

Teacher accreditation to evaluate school-leaving students spread beyond the sciences to other core subject areas beginning in 1967 (STF, 1992a; ST35, S106). The Committee on Evaluation and Monitoring (SK Ed, 1989) recommended that teacher accreditation continue by subject with periodic renewals. The province adopted a policy, effective 1991, requiring the renewal every five years of a teacher's accredited status (SK Ed, 1992a; STF, 1992a). (In 2001, unaccredited teachers determine 60% of the student mark (S76).) One participant comments that a board of education directed teachers to reduce the use of final exams. The participant opposes discontinuing the final because the provincial exams respond to a perceived need for provincial standards, provide students a second chance, and are flexible with an exemptions reward system that facilitates classroom management and motivation (ST22).

In 1994, Saskatchewan initiated a Learning Assessment Program (LAP) to assess student achievement in grades 5, 8, and 11 in language arts and mathematics. Since 1996, Saskatchewan also participates in the School Achievement Indicators Program (SAIP). Participants observe teachers significantly influenced the government regarding Saskatchewan's delayed participation in the national program and development of the provincial indicators program (STF, 1991; S27, ST29, S37, S47, ST58, S66, S67, S76). LAP and SAIP are just two of many data sources for the provincial indicators program. The province has never disaggregated the data, one participant notes, because there are many reasons why students in one school may not do so well as students in another school (ST58).

In spite of the good efforts to place results in context, the government used the results differently, observe two participants. Saskatchewan math scores were shown to be low as compared by national tests. The low results were verified by the provincial assessments in 1997. The Department said teachers are not spending enough time on the curriculum, announced a \$200,000 per year action plan, hired consultants to train teachers, assessed time spent on math, and said the problem is solved instead of trying to explore and understand the related issues (ST29, S66). One participant notes the Federation recognized the Minister's need to respond to a politically embarrassing situation. The participant observes the recognition of a political need is reciprocated among the education partners (ST29).

The cooperation among education partners in the integration of the internship within the education system exemplifies shared goals and values that are characteristic of an institutionalist state. Teacher accreditation for student school-leaving evaluation and teachers' role in the field-experience during teacher education, both acknowledge professional responsibilities in student evaluation and teacher training and respect teachers as professionals who exercise prudent judgment in the application of skills and knowledge. Teachers, as reflective practitioners, are characteristic of partner relations in the preliminary typology. Teachers are held accountable for their performance through locally determined supervision and evaluation processes. Teachers' work is also assessed through the curriculum evaluation program, the learning assessment programs, and the national indicators program.

Conclusion

Concluding remarks consider the perceived influence of organized teachers and state relations on education reform and the impact of legislated changes on teacher unionism. The appropriateness of the preliminary typology to explain the relations is considered.

Perceived Influence of Relations on Education Reform

There is a non-confrontational attitude in education in Saskatchewan, observe participants. To achieve anything major there has to be appreciation and respect for other points of view (ST18, ST29, S37, ST52, ST58, ST69, S77). Nine participants observe the norms are clear and embedded.¹⁵ The education community does not undertake nor does the government impose significant reform, without developing a process that provides for meaningful collaboration. That is a process that people, at times, may find frustratingly slow, but the process is usually strengthening not inhibiting. In the end, observe

¹⁵ “The Japanese system works so efficiently because both labor and management internalize the rules: workers work and managers look out for their interests without coercion or the transaction costs of a formal legal system of rights and duties to regulate their relations” (Fukuyama, 1995, p. 192).

participants, even though people do not agree with everything, they are able to live with it.¹⁶ Participants observe the education sector builds ownership, both before and as change happens. Reforms evolve gradually and maintain focus on shared principles. The nine participants conclude that reforms in Saskatchewan are deeply embedded, stable, and, in the long run, are more rapid and less costly (ST18, S27, ST29, S31, S37, ST52, ST69, S76, S77).

Three participants judge collaboration has prevented Saskatchewan from jumping onto band wagons or alienating people by taking away their voice, although at times the process has made change difficult or very slow or caused inaction (ST29, S66, S70). Two participants remark the working relations should ensure quality, not just maintain the relationship (S47, S76). One participant believes the emphasis on relations has limited the potential to engage in critical thinking that in turn impacts on the quality of education. The participant thinks the relations do not allow for other voices, for objectivity, or for the parties to challenge one another to the degree that they might. Elsewhere, parties are often caustic and that is not the answer either, remarks the participant (S47). An emphasis on the relations over the quality of the decision does not happen, state several participants. Due to the *internal integrity and values* of the organizations involved, there is a willingness to be pushed only so far (S27, ST84). There isn't collusion or a subservient relationship; there is ample debate and individuals and organizations are capable of being small 'p' politically active (S70). The processes are open, with the opportunity for critics to participate and place their special interest in the bigger picture (ST18, S37, ST69). The valuing of the relationship allows people to respectfully listen to others' points of view and encourages people to look for ways to work together (S77). Participants observe there is a *high level of trust* so people operate in a climate where they can take risks and innovate (ST18, S37, S66, S70, S76, ST102). Arrow (as cited in Fukuyama, 1995) observes, "trust has an important pragmatic value, if nothing else. Trust is an important lubricant of a social system. It is extremely efficient; it saves a lot of trouble to have a fair degree of reliance on other people's word" (p. 151).

¹⁶ Fukuyama (1995) notes that "within a large Japanese corporate bureaucracy, decision making is notoriously slow [due to] the need for consensus. . . (p. 170).

One participant perceives the government and Federation partnership as the most important factor in making curriculum reform happen. The participant perceives the respective roles are complementary. STF-identified needs become Department responsibilities. The process is not adversarial, and efforts are aligned because the goals are the same although the perspectives differ. Issues in the annual “STF Brief to the Minister” are often consistent with an action the Department wants to take anyway. The participant observes the message to the minister raises the priority of the action (S77).

One participant observes Saskatchewan had the *resources* to begin curriculum renewal but was unable to sustain implementation. In the early 1990s, there was a severe tapering off in the resources of all partner groups. The province saw declining student enrollments, migration to the cities, and school closures. The participant notes decreases in the Foundational Operating Grant affect how school divisions resource education. Boards cut programs, curtail the purchase of library resources and equipment, and delay the implementation of curriculum. Capital expenses are adversely affected. As a result of decreased funding, there are efforts to amalgamate functions. The Department reduced the number of advisory committees from one for every subject with all the education partners represented, to a single writing reference team with only teachers and university personnel represented (S77). Developed in a time of prosperity in the province, *Directions*, Robinson (in press) observes, failed to forecast the economic downturn, child poverty, and the extent of aboriginal education needs. The plan did not consider issues of funding, Canadian unity, skills training, or the extent of the impact of technology. Robinson finds the review process does serve “as a significant model of education reform”, “united partners in education”, “illustrates the spirit of cooperation”, and provides a culture that “values a reflective approach to educational practice” (p. 8 of text).

Impact of Legislated Changes on Teacher Unionism

In a shift away from a unitary organization, other Canadian teacher organizations have been threatened and two forcibly broken up, five participants observe (ST18, ST19, ST29, S31, ST105). Three participants observe Saskatchewan is bucking the trend (ST18, ST29, S31): Government granted the STF responsibility for teachers’ ethical conduct in

1948, the performance of members in 1970 (McDowell, 1967; STF, 1999; Young, 1970), and the collective interests of teachers in 1997 (STF, 1999). The latter debate created a political storm, recalls one participant, but the vote that coupled unionism and professionalism closer than elsewhere in Canada was unanimous (Edvisor 1997; Herron, 1997a; ST29). The significance of the 1997 change, notes one participant, is the capacity to look at public interests separately from teachers' collective interests (ST105).

With the added authority, in 1997, the STF undertook a review of its code of teacher conduct. Four participants observe the question of what is professionalism led to a reexamination of the role of school principals and the role and competency of teachers¹⁷ (STF, 1999; ST58, S66, S70, ST78). One participant views this reexamination as powerful when generated by the profession itself, as in the Federation's case (ST78). Another participant observes that gaining responsibility for teacher competency in 1970 similarly led the teacher organization into questions about the adequacy of pre-service training, continuing education, inservice, and professional development (ST18).

Six participants suggest Federation strength comes from the focus on teaching and learning that avoids power struggles and a purely self-interested point of view (ST19, S31, ST58, S76, ST88, ST105). Two participants identify individual teachers as the most credible spokespersons on education in the province (Fast & Associates, 2001; Tanka Research, 2001) and note Saskatchewan teachers have not abused that public trust (ST29, S31). One participant perceives that how the public views education is wrapped up in

¹⁷ Three participants observe the organization needs ways to enable the Competency Committee to shift the focus from discipline to a focus that promotes, supports, and celebrates teacher competence (ST18, ST78, ST105). The Federation received only three complaints regarding teacher competency since 1970 (STF, 1972-2000) compared to 289 concerns since 1948 regarding the conduct of teachers (STF, 1949-2000). In all three cases the teacher was found incompetent. In the 1991 competency case, the STF offered the teacher professional development to support change. Based on responses from 1000 Saskatchewan teachers, Gallén and Bold (1989) observe successful teaching behaviours are based on attention to student social, emotional, physical, and intellectual needs. Successful teaching creates opportunities for student learning, leads students to learn, and manages classrooms. The study associated low skill levels, poor decisions, lack of effort, and unfair treatment of students with unsuccessful teaching. Schultz (1990) observes that if the only sanctions available to correct incompetent teachers are reprimand, suspension, and expulsion, it is unlikely they would be applied. "However, if the competence committee can demand that courses be pursued or that the professional practitioner limit practice to fields for which training has been taken, it can afford to take a helpful rather than punitive stance. In this case it might be able to have a positive effect on individual practitioner competence" (p. 9).

how they view teachers. The participant believes it essential that teachers be seen as a professional body providing professional service (S76).

The goal of organized teachers' responsibility for the certification of teachers, and the evolution of authority granted to the teachers' organization by the government, suggest the importance assigned by the parties to education and to professional status. Status acknowledges the skills, training, and judgment of professionals; demonstrates respect; and affirms trust. In the preliminary typology, mutual trust is characteristic of political unionism in partnership with an institutionalist state. On each occasion, added responsibilities caused organized teachers to reflect on teacher professionalism and the role of their organization.

Partner Relations

A social democratic history fosters participation in Saskatchewan where teacher activism is influential in an environment of trust built on respect. A number of factors favour the development of an institutionalist state and the political unionism that are characteristic of partner relations. These factors include: societal acceptance of public ownership and cooperation, the tradition of working together, the sense of community, and the politics of finding the middle ground and maintaining relationships.

One participant identifies the successful experience with collaboration over a long time as an unbelievably powerful cultural norm in education (S67). Nine participants observe collaborative relations are more evident in education than with respect to any other public policy sector in the province. Elsewhere, eleven participants observe, government extremes in practice and teacher adversarial approaches, while in Saskatchewan the tendency is to walk closer to the middle of the line. The unique Saskatchewan environment for addressing challenges in education was summarized in an STF Brief to the Cabinet in 1982:

One needs only to observe what has been happening in many other provinces over the past years to recognize that we have a unique Saskatchewan model for dealing with many of our educational issues -- a commitment and process that is worthy of continuing. This does not mean that from time to time there have not been sharp differences on issues. It

has meant, however, that the party's attempts to solve problems will first be through co-operative approaches rather than by confrontation. (p. 3)

The moderate approach is attributed to the state-promotion of cooperation and the teacher organization's unitary structure, multiple mandates, non-partisan political influence, and responsible and self-help attitudes. A balance between local and provincial authority and Saskatchewan's cultural and education partnership traditions also play a role. Teacher activism and political influencing have a long history in Saskatchewan supported by teacher leadership, the small population, and a substantially rural society.

Challenges to organized teachers' integral role in policy setting and curriculum development are viewed with caution. First, three participants observe that teacher participation and involvement in curriculum development are still respected, but teachers' voice is not heard to the same extent since the mid 1990s (STF, 1997b; ST24, ST78, ST84). One participant speculates the change may be a result of intensification, lack of resources, differences in how the STF and the Department relate, and the Department's adoption of a curriculum model used in other provinces. The participant identifies considerable pressure on teacher representatives to adopt the Department's views, creating a sense of being co-opted (ST78).

Second, another participant believes the western curriculum protocols, national curriculum, and national testing threaten the opportunity for professional growth for Saskatchewan teachers (ST84). In the state move to inter-provincial collaboration on curriculum, notes another participant, all of the education partners feel somewhat isolated from the process (S76).

Third, there is an expansion of who is deemed to be a partner in policy setting, observe participants. Two participants think it important not to be, or be perceived as, a closed shop (S27, S47). Others note that there are more corners in the relationships and more parties to bring to an agreement. As a result, the teachers' voice is diluted and organized teachers' role in policy setting is challenged strongly (ST18, ST72, ST78, ST84, ST88).

Fourth, two participants comment on the significance of the 1999-2000 public dialogue about the role of the school (ST29, S76). Implementation of the recommendations of the Task Force that advocate the school as a center of community

development will require new partnerships and approaches to schooling (Kouri, 2001, Tymchak, 2001).

To date, *partner relations*, historical and institutionalized political relations, characterize organized teachers and the state relations in Saskatchewan. Partner relations have been central to education reform. The experiences of diluted teachers' voice in policy setting, and reduced teacher opportunities in, and partner feelings of isolation from, curriculum decisions connote change. Is this a period of transition from curriculum renewal to school renewal, characterized by curriculum maintenance and the creation of new partnerships to address the evolution of the role of the school? Is there a betrayal of the partnership, (such as the experience in Britain), in a move toward a more centralized and authoritarian mode of regulation? Or, is there a passive process of privatization occurring?

Inadequate state funding to support and enforce state education policies causes the public education system to be vulnerable to private interests. International and national trends and pressures for conformity to facilitate comparison, point to more centralized control. However, the history of cooperation in Saskatchewan suggests a period of transition from education to school reform.

Relations between organized teachers and states are dynamic. Chapter 8 presents a summary of the present study as well as conclusions based on comparison of the cases.

CHAPTER EIGHT

SUMMARY, CASE COMPARISONS, AND QUESTIONS FOR FUTURE RESEARCH

The present comparative study provides insight into diverse relations between organized teachers and states with respect to education reform in selected education jurisdictions. People and states can, with thought and commitment, change their institutions (Fukuyama, 1995; Paton, 1962; Wever, 1995). When states and organized teachers understand their relations, they can manage their respective roles in the reform of education to support the development of democratic communities.

A summary of literature, theories, and methodology provides the framework for comparisons among three cases. A synopsis of the cases is provided. In response to the research questions, comparisons of the cases explain factors that contribute to differences in relations and demonstrate the interaction of diverse relations with education reforms and reform processes. The case comparisons also support revisions to the preliminary typology. The chapter concludes with the identification of questions for future study and reflection on the social significance of the present study.

Literature Review

The literature review establishes the context for the present study. Four topics are considered: work organization and industrial unionism, education unions, education reform, and education policy setting. Changes in work organization in industry are transforming industrial unionism. Education reforms have an impact on education unions, directly through legislated changes to the mandate of teacher unions and indirectly through changes in teachers' work. Economic, bureaucratic, and social democratic interests compete for control of education reform, resulting in contradictory education objectives and regulations. Education policy is one forum to resolve or accommodate competing interests. Achieving consensus is no easy feat and depends upon agreement that consensus is desirable and a commitment to achieve it.

Theoretical Framework

Work organization, education reform, and education policy each demonstrate the influence of ideology in determining change and change processes. In industry, management strategies of domination or stabilization to change the organization of work reflect, respectively, neoliberal or social democratic ideologies. The economic, bureaucratic, and social democratic interests driving education reforms and shaping education policy are linked to political ideologies as well. One cannot avoid ideology. The conceptual framework takes a closer look at the nature of ideology and three competing ideologies in public education: liberal meritocracy, conservative elitism, and democratic egalitarianism.

Holmes' (1981) proposes that comparative research to examine social relations be guided by ideal-typical normative models. Holmes contends that education goals, or the objectives of social action, acquire meaning when "seen in relation to normative statements about *individuality, society and knowledge*" (p. 115). For example, Rizvi (1994) observes that different educational and political assumptions result in economic, corporate managerialist (bureaucratic), or social democratic forms of decentralization.

Framed by social theories, a typology of three ideal-typical models of organized teachers and state relations is constructed. *The typology is presented as a hypothetical construct refined through application to three case studies and constitutes the empirical base of this thesis.*

An analysis of the theories applied demonstrates that, although there are a number of ways in which to construe organized teachers and state relations, there are some commonalities (Table X, page 87). One common thread in the theories is the polarity of participation and domination, cooperation and conflict, and integration and opposition. A second common thread is that two forms of opposition to domination emerge. Opposition may be based on individual or collective goals. A third common thread is the correspondence between state modes of regulation and the type of control exercised by the competing interests in education. A synopsis of the theories follows.

Bacharach and Mundell (1993) identify power relations in school politics based on domination and participation. The power relations motivate two modes of regulation in schools: bureaucratic accountability and professional autonomy. Ben-Ner (1993) identifies in organization structures, the choice of *market, authority, and trust control mechanisms*, (in Crozier and Friedberg's (1980) terminology: modes of regulation). The mode of regulation chosen can induce cooperation or conflict in the relations between the principals and the agents in an organization.

Touraine (1965) cautions that all forms of social action must be considered in rapport with the history of the problem. In the present study, the history of public education in three cases is the setting to examine social action. Touraine employs a combination of situation and action. The rationalization of political action by economic, social, or political means leads to negotiation, opposition, or integration as union forms of social action. Touraine observes that *social action is oriented by values framed as objectives and applied in institutionalized social relations and decision-making fields*. Action is always collective in some manner, notes Touraine, and self-references to three principles: totality, opposition, and identity. The three principles correlate with Holmes' (1981) concepts of society, individuality, and knowledge. Development of the three concepts contributes to the description of ideal-typical national circumstances (Table IX, page 85). The model national circumstances correspond with the three political ideologies that compete for control of education in western industrialized countries.

The preliminary typology relies on a '*sociology of organized action*' (Crozier & Friedberg, 1980). Examining the state modes of regulation in relation to organized teachers' strategies produces a grid of relations. Exclusivity of types is achieved by considering only the intersection of associated means of regulation and influence: market incentives and exchange, authority and influence by opposition, or mutual trust. Ideology influences the union choice of strategy or state mode of regulation. Relations operate in, and are influenced by, the larger historical and socio-political context. Teacher unions negotiate individual goals, collectively oppose authority, or participate to develop shared societal goals, in response, respectively, to the economic, social, or political rationalization of governance.

Commonalities in the theories and the competing interests in education suggest three ideal-typical models of organized teachers and state relations: *labour, class, and partner relations* (Table XI, page 87). Descriptions of national circumstances built on concepts of *society, individuality, and knowledge* flesh out the typology (Table XII, page 93):

1. It is anticipated that an emphasis on *labour relations* would result from market regulation and the economic rationalization of political action. Incentives would be exchanged through negotiations for labour. A peripheral state and economic unionism would characterize the players in labour relations. The curriculum would be shaped by a combination of teacher specialists and client preference. The central objective of economic unionism would be *the individual welfare* of workers in the employer-employee relationship.

2. An emphasis on *class relations* would arise from regulation by authority. A class state and social unionism would characterize the players. Teachers would be perceived as technicians and would be expected to follow the centrally and state determined rules. The *collective investment* in social change in opposition to authority would be associated with social unionism.

3. *Partner relations* would reflect participation in mutual trust toward *shared goals*. An institutionalist state and political unionism are associated with partner relations. Educational knowledge would be jointly determined. A reflective practitioner who exercises judgment in tandem with knowledge would exemplify the professional teacher.

The ideal-typical models of relations correspond with the three competing ideologies in public education. The goal of liberal meritocracy is apparent in labour relations. Collective opposition challenges the social efficiency and reproduction goals of conservative elitism in class relations. Partner relations demonstrate democratic equality and support the shared goal to transform society desired by democratic egalitarian ideology.

Methodology

The research approach is socio-historical in nature and employs theory to conceptualize and compare the relations between organized teachers and states. A socio-historical approach helps explain complexity and change in education and offers a theoretical framework (Grace, 1987; Kaestle, 1997). The research method involves the explanation in historical context of three case experiences. Case studies access a social perspective that helps connect theory and practice (Hamel, 1997). Attention to individual stories in the larger socio-historical context is a means to better understand the complexity of the interorganization relations. Individual stories also articulate uniqueness within a global context (Lessard & Tardif, 1996; Novoa, 1995).

Sociology makes three significant contributions to the study of education that are pertinent to the present research. The social theories examined raise awareness regarding the ideological effect, power relationships, and the connection between political legitimacy and the legitimation of knowledge in education. The conceptual framework introduces, and a preliminary typology further develops, the three sociological themes. The preliminary typology provides the interpretive framework for analyzing and reporting the data. The research method involves the explanation, in historical context, of education reform in three cases. Where possible, participant language is used to describe the case. In contrast, the language of theory in the form of the preliminary typology is used to explain the cases. This approach distinguishes and bridges the two types of knowledge at work: the participants' language of their experience and the applied language in the theory that explains the experience. This rich description with explanation is an interaction of the data, the theory, and the researcher, and is not reducible to any one source. The mosaic created may not tell the whole truth, but helps to identify patterns in the diverse relations.

The present study relies upon interviews with participants as the primary source of data, supported by a review of primary and socio-historical documents. As Lessard and Tardif (1996) note, it is important to multiply sources of information and strategies to take into consideration macro and micro sociological dimensions of the reality studied. Purposive or criterion-based sampling was used to select interviewees. Participants were

selected from among individuals with work experience in the education system: politicians and bureaucrats with responsibilities for the government department of education, members and staff of teacher unions, and individuals with neither government nor teacher union perspectives (Appendix B). The present study is based on *seventy-four interviews conducted with seventy-eight participants* from November 1998 to April 1999. Relevant data regarding the Saskatchewan Teachers' Federation are included from *34 interviews conducted between November 1996 and February 1997 and seven interviews conducted during May and June 1997*. Eleven participants in Saskatchewan were interviewed in both 1997 and 1999. Incorporated in total were *115 interviews with 108 people*. Primary documents were selected for their contribution to demonstrating or building understanding of the relations between organized teachers and states. Differences in the type and nature of primary documents are examined, rather than their contents. Secondary socio-historical sources and primary documents demonstrated the interaction of actors in each situation, affirmed or disputed participant-generated data, provided local insight, and raised new questions or lines of inquiry.

Four methods used in the present study serve to strengthen validity, contribute to theory development, and permit the explanation of state and organized teacher relations in other similar contexts.

1. The study identifies and attends to three conditions essential to comparative methodology: context and interdisciplinarity, impartiality, and comparability. The study is socio-historic in nature and presents the researcher's frame of reference. The cases were selected from among western post-industrial democracies, and participants reviewed a reporting of their interview data categorized by pre-determined themes.

2. The use of a semi-structured approach to data collection and a predetermined framework for data analysis and reporting optimize description and enable generalizability across the cases (Firestone and Herriott, 1984).

3. The use of an ideal-typical model to explain the known qualities of a case strengthens the representative value of the case. Ideal-typical models also facilitate case comparison (Holmes, 1981). The insistent explanation of the known qualities of the cases gives life to the theory (Hamel, 1997).

4. Placing the case descriptions in context and comparing cases to the preliminary typology and to one another, create external references. The use of external references breaks the circular pattern of self-reference, enhances the validity of the study, and permits theory development (Schriewer, 1997b).

In preparation for comparisons among the cases, a summary of the three cases is provided.

Three Case Studies in Summary

The writing of the case studies in context is a personal construction that incorporates participant voices, socio-historical documentation, theory, and observation. The picture creates a patchwork that helps to identify shapes and patterns in the histories of the diverse relations. The relations between organized teachers and the state in three cases are described and explained. Context, state regulation, knowledge in education, union influence, and conclusions regarding the preliminary model (in that order) frame the following synopsis for organized teachers and state relations in each case.

Organized Teachers and State Relations in Victoria, Australia

Differentiated schooling is historical in Victoria. The affluent society and growing bourgeoisie paid the private school fees and resisted state involvement in secondary education until the 1950s. The Liberal Party has, with the exception of the 1980s, dominated politics in Victoria with a platform of decentralization, individual choice, excellence, and economic growth through private enterprise. Relations between organized teachers and the state changed dramatically in 1992 when Labor lost, and the Coalition (Liberal Party and National Party [conservative]) received an overwhelming mandate in state elections. *Economic purposes* defined the goals for education in the 1990s. The Coalition promoted the achievement of *individual excellence* to contribute to the development of the Australian economy and society in a competitive environment. Education reform in Victoria was chosen for study in anticipation of an alignment with the proposed labour relations model in the preliminary typology. Education reform in

Victoria in the 1990s exemplifies an economic rationalization that maintains centralized power and historical class differentiation. By extrapolation from history and the 1990s reforms, the preliminary labour relations model is affirmed with an amendment.

The Coalition perceived the teacher unions to excessively control the Labor Government and believed teacher unions had no role regarding education policy decisions. Some participants agreed the teacher unions did not exercise sufficient responsibility in the unions' preferential relations with Labor. Coalition reforms demonstrated *state regulation both by market and by centralized control.*

On one hand, *change corporatized and privatized education* by decentralizing responsibility for budgets and operation to School Councils. Decentralization increased school principals' powers, gave parents voice, and diminished teachers' collective voice. (The two teachers on the Council may not be teacher union representatives.) The Coalition required local accountability through annual school goals, annual school reports, and an external evaluation every three years. The historic fragmentation of teacher unions and the voluntary nature of union membership in Victoria resulted in the need for unions to actively recruit members. *The decentralization of responsibility to schools, and voluntary membership in teacher unions, are consistent with the concept of individuals operating in a free enterprise environment.*

Forcing teacher unions to operate independently in fee collection, and attempting to terminate teacher contracts without compensation, impose reliance on an individual's or an organization's ability to succeed in the open market. The state also put the *accent on the individual* by treating parents and students as consumers, placing teachers on individual contracts, and introducing local authority for school operations. These characteristics are *consistent with a peripheral state use of market regulation and emphasis on meritocracy.*

On the other hand, *the Coalition adopted rules* governing conduct that restricted the language School Councils could use to write school Charters and limited freedom of speech for individual teachers. The Coalition blamed school-based choices for parental and school dissatisfaction with school funding and programs and did not assume responsibility for centrally determined constraints. The Coalition took over teacher certification and used selected rather than representative membership on committees,

thus implementing *means of control*, not just avenues for accountability. The Coalition disregarded the teacher unions. The Coalition promoted individual teacher professionalism, individualized teacher contracts, and introduced pay for teacher performance appraised annually against standards. A government-appointed committee determined the teaching standards. Pay based on performance fits a market regulation philosophy. However, assessment against imposed standards is a form of control. The preliminary typology proposes that *centralized forms of regulation such as rules, standards, and supervision are characteristic of a class state*.

The Coalition *introduced standards and a student learning assessment program, imposed teaching standards, and continued to implement a centralized curriculum* at the same time as purporting to engage teacher professionalism. The curriculum and standards for student evaluation originate in Commonwealth policy and create a framework to manage education. The national framework creates a regulated rather than free market context. The emphasis on control and standards is contrary to the expectation that decentralization of curriculum decisions, and teachers as discipline specialists, would characterize *knowledge in education* in a peripheral state employing market regulation.

Economic issues and working conditions receive greater teacher union attention than professional or social issues. The *union* emphasis on economic issues is due to the Australian industrial relations framework, the need to recruit members, registration as a trade union, and the political climate in the 1990s. *Teacher union influence was limited to arbitration under the federal industrial relations system.* The Coalition excluded the unions from state and local education decision-making forums, abolished the state industrial relations legislation, and consulted only with school principals and selected individuals. Three teacher unions amalgamated to form the Australian Education Union Victoria Branch (AEU Vic) in order to access the federal industrial relations system. The strategy caused the Government of Victoria to cede powers to the Commonwealth and forced the state to attend to federally prescribed industrial relations obligations. Following limited success through arbitration, the AEU Vic turned also to community-based political action to influence change. The AEU Vic class-size campaign and the AEU Vic outcry regarding the treatment of term-contract teachers made some gains on those specific issues. Whether the AEU Vic strategy was instrumental in the political

change in 1999 is not clear. However, the Coalition was defeated by a minority Labor Government following two terms in office.

The experience in Victoria, where the government met only imposed legal obligations, suggests that the *union role becomes one of survival rather than renewal under market regulation. The union is reduced to protective, supportive, and insurance functions, while the mobilization of membership supports the achievement of issue-specific goals.* The observation is not new. Jessup (1985) finds the need for three American teacher unions to attract and retain members created the necessity to build solidarity on economic issues. The evolution of teacher unionism in Britain carries a similar message. In 1985, Lawn suggested the likely consequence of direct control in the United Kingdom is a more radical, better-organized union. In 1996, Lawn reports obliteration of the union's national role. Lawn observes members, as consumers, look to unions that offer new levels of service such as insurance and car loans. With changes that curtail the union role in collective bargaining, Voos (1997) anticipates the mobilization of industrial union membership to achieve special interests.

In conclusion, the *state dominated relations* with the teacher unions in Victoria, by employing *strategies characteristic of both a peripheral and a class state.* The Coalition significantly undermined and limited the collective voice of teachers. The *AEU Vic influence on education reforms was limited to resolution of grievances arbitrated in the federal industrial relations system,* and later, to community information campaigns. Rather than extinguishing organized teachers' voice, Coalition strategies gave purpose and legitimacy to the AEU Vic search for new avenues of influence.

The typology requires some clarification and some refinement to describe the anticipated national circumstances in a free market. First, during the pre-1980s liberalism in Victoria, schools and teachers set the curriculum. The pre-1980s experience suggests that the proposals: teacher specialist and decentralized curriculum decisions, are plausible forms of professional and educational knowledge under market regulation.

Second, the introduction of individual teacher contracts brings the preliminary typology into question. Teachers accept state incentives in exchange for pay-for-performance. There is no negotiation, no collective bargaining. The preliminary labour-relations model is built on the assumption that organized teachers negotiate to influence a

state that employs the market mode of regulation. However, *there is no formalized avenue for organized teachers to negotiate with or influence the state within Victoria.* The state changed its law to sever the relationship.

The market as a mode of regulation emphasizes individualism and has no role for the union. This finding is apparent also in the elimination of teacher collective bargaining rights in Britain and the experience in industry (see Bélanger, 1993-1994). The AEU Vic relies on federal industrial law and some community influencing to impose minimum standards to offset state authority and to regulate the education market. Organized teachers force the state to attend to teacher economic welfare and employment concerns by means of third party intervention.

During the period 1992-1999, labour relations characterized organized teachers and state relations in Victoria. However, the teacher union protected its members, rather than proactively negotiating incentives as anticipated in the preliminary typology.

Organized Teachers and State Relations in Québec, Canada

Québec's history displays dynamic conflict between the European founding nations for land, power, and language, between the Catholic Church and the state for control of education, and between the lay elite and workers for the modernization of Québec. This history of conflict, domination, and opposition, conditions Québec society to social debate, and sets the stage for confrontational relations between organized teachers and the state. Social and political concerns, rather than professional or only economic interests, shape the state and teacher union relations. The relations are influenced by shared government and union goals to protect and nurture the francophone society. The teacher union relations with any one political party in power vary with the degree of support for the project to claim Québec political independence from Canada. There is a societal tolerance for union engagement in philosophical debate and social action such that, in the absence of a real left-wing party in provincial politics, the CEQ exerts extra-parliamentary pressure for social democratic causes. Traditional French cultural norms, evident to Fukuyama (1995) in a comparative study of trust in the economic sector, appear to influence interorganization relations in Québec.

State regulation of education began in 1960. Government reforms replaced the powers of the Catholic Church and *centralized control of education in the state*. *The state exercises its power in a traditional hierarchical structure*. Governments in the late 1960s, early 1970s, and early 1980s employed *authoritarian control*. Governments of various political affinities ended teacher strikes, imposed working conditions, or rolled back agreements with teachers. Government actions *contributed to mistrust and polarization of union and government powers*. Québec governments employ *paternalistic authoritarian control strategies* that continued during the 1990s. The government consults with the union at times and on terms set by the government, in preference to ongoing collaboration. The government appoints employer-identified teachers to government committees, rather than union-identified teachers.

More in keeping with peripheral state market regulation, the 1997 reforms create school governing boards (Conseils) that *open management structures* to parents, community, and personnel at each school. The reforms enable the Conseils to set the school mandate and direct its operation. Conseils must operate within the provincially determined education framework. School boards coordinate personnel and resources among Conseils within their jurisdiction. In these ways, decisions at other tables limit the latitude of the Conseils. The new powers may be meaningless unless the regulatory burden is lessened. Regulation by rules and authority is anticipated in class relations.

Knowledge in education is undergoing change in Québec. Characteristic of class relations, government introduced a *prescriptive curriculum in the 1980s* that caused some to *compare teachers to technicians*. The *1997 reforms* encourage teachers to interact with the curriculum as reflective practitioners: The framework for instruction encourages team teaching; and teachers may adapt up to one fourth of the curriculum to meet community or individual student needs. However, in keeping with regulation by authority, the new framework for instruction was centrally determined. The government continues to set a provincial curriculum and requires province-wide, standardized student testing. Student achievement is published without context. CEQ influence on curriculum is not apparent to union member and non-government participants. At odds with regulation by authority, there is no mechanism for the supervision and evaluation of teachers. The absence of a face-to-face relationship with authority may be explained by efforts to professionalize

teachers in the 1960s, negotiated accountability processes, and French cultural influences.

Teacher-union influence is of consequence in Québec. Application of the Rand Formula in 1959 assured the teacher organization both membership and dues collection. The imposition of *provincial bargaining* in 1967 gave power to the *unified* teacher organization. Affiliation with labour, beginning in the late 1960s, demonstrated class solidarity in *a movement for social change as well as for economic advancement*. In the 1970s, in keeping with the mood of the quiet social revolution of the times, and in reaction to authoritative legislated interventions in teacher collective bargaining, the teacher organization became a federation of education and other unions, la Centrale de l'enseignement du Québec (CEQ). The CEQ *emphasized social action and favoured a worker orientation over a professional orientation* for its members throughout the 1970s. In the 1980s, CEQ support for the Québec national project replaced the worker orientation, but action for social change continued. In the 1990s, the CEQ favoured a 'rapport de force', *a mobilization of its membership and of society, to pursue a range of social issues*, rather than openly combating class relations in the traditional Marxist sense or using the radical opposition of the 1970s.

The CEQ publicized concerns regarding student retention, sought public participation in education goal setting, and promoted public education, secular education, early childhood education, and equitable distribution of resources. Under pressure from the CEQ and other interest groups, government held public consultations on education. The government recognized an official report and recommendations arising from these public consultations only following CEQ and other external pressure to do so. In the 1997 reforms, government introduced pre-school programs and reorganized school divisions on a linguistic rather than confessional basis. The CEQ *emphasizes social issues and a teacher role in school governance, in preference to professional development or pursuing strictly economic goals*. The CEQ is a significant player in shaping the education reform process and promoting socially-oriented education reforms in Québec.

In conclusion, in the 1990s, the state retains authority for education in Québec, but is decentralizing some curriculum responsibilities to the schools. The state selectively

consults with the teacher union. The union pressures the state to attend to process and social issues. In 1967, 1971, and 1982, various political parties in power broke teachers' trust. Participants' vocabulary reinforces images of confrontational relations and demonstrates *a continuing lack of trust in relations in the 1990s*. Both the state and the teacher union think communication is not clear regarding information or points of accord. Poor communication is due to mistrust, and possibly due to French cultural influences, or a lack of institutionalized norms for communication. The 1990s saw efforts to collaborate without results that both the union and the state could celebrate. The lack of mutual satisfaction suggests that *confrontational hierarchical relations are deeply rooted, or that conditions that could enable collaboration and develop trust are complex, or both*.

The experience in Québec is a reasonable fit with the class-relations model in the preliminary typology. Although the term 'class' is associated with Marxism and class struggle, it is retained. Social unionism is a political force in a quest for broad social change. The term, class, conveys the hierarchical power structure and acknowledges the bureaucratic structures and the polarization of power between state authority and organized teachers' influence. The phrase, class relations, also conveys the social rationalization of political action in Québec.

To the turn of the millennium, *class relations* characterize organized teachers and the state relations in Québec. Reforms introduced in 1997 prompt change and offer another opportunity to reshape CEQ and Québec government relations.

Organized Teachers and State Relations in Saskatchewan, Canada

Saskatchewan began as a rural society. Although still scattered across the province's large geographic expanse, the sparse population of approximately one million residents is increasingly concentrated in urban settings. The hardships of the "Dirty Thirties" developed in residents a willingness to risk political and social innovation. The harsh conditions that enforced cooperation for survival led to an enduring culture of cooperation. There is a *tradition of working together* in the province, a way of thinking where people seek the middle of the road, maintain relationships, and find compromise in a genuine attempt to be fair and equitable in trying to meet everyone's needs. Teachers

see themselves as part of the province and exercise widespread influence in the province's political and social life. The public regard for teachers and respect for teacher leadership are fundamental to the influence that teachers enjoy in an open relationship with government.

State regulation by collaboration in education distinguishes Saskatchewan. Collaboration requires trust. Collaboration in the education community is strengthened due to both cooperative and adversarial relations in the intertwining histories of Saskatchewan politics and the organization of teachers. A number of factors contribute to and sustain collaboration at the provincial level. Factors consistent with American teachers' consensus-building experiences (Payeur, 1994) include shared goals, clarity of values, supportive structures, and a focus on process rather than position. Additional factors that support collaboration, as identified in the Saskatchewan experience, are a personal dimension, individual and organizational conduct, shared responsibility for facilitating collaboration, limited resources, stable but active non-partisan political relations, respect for teachers' professional expertise, and the sharing of knowledge.

Saskatchewan uses a combination of centralization and decentralization strategies to enable attention to local interests within a framework of cooperatively set societal goals for education. Local property tax revenues and local decision making work in tandem with provincial equalization grants and jointly developed centralized regulation. Bi-level teacher collective bargaining ensures equitable salary and benefits province-wide, yet accommodates variations in working conditions to address local needs. Governments respect teachers' professional expertise and invite organized teachers to participate in education affairs. However, the provincial norm of collaboration is not uniformly established between boards of education and teachers at the local level where the employer-employee relationship is emphasized.

Organized teachers and the state collaborate with others in the determination of *knowledge in education* in Saskatchewan. The education partners share responsibility for the design and delivery of curriculum and for the development of criteria that guide teacher-education programs. Since the mid 1940s, teachers have been involved in curriculum renewal processes. The integral role of teachers in the development of Saskatchewan curriculum transcends partisan politics. Under the NDP in the late 1970s,

teachers and their organization identified the need for curriculum renewal. The Conservatives conducted a comprehensive public review of education in the early 1980s that resulted in provincial goals for education. In the late 1980s, education partner organizations sustained the collaborative curriculum review through changes in senior officials and a changed education agenda with Conservatives still in power. The NDP and the NDP-Liberal Coalition continue to support the curriculum project into the new millennium. Teachers experience the curriculum as dynamic and exercise professional latitude to make the curriculum relevant to students.

Governments of various political ideologies also placed trust in teachers and their organization regarding the training of teachers and student evaluation. In the late 1960s, the Liberals recognized and affirmed the professionalism of Saskatchewan teachers by accrediting teachers to set final school-leaving exams and involving teachers in the field-experiences component of teacher-education programs. In the 1980s, the Conservatives reviewed and reaffirmed the two practices with some recommended modifications. In the 1990s, the NDP implemented the modifications. Teacher accreditation and teacher voluntary participation in teacher education continue in 2001. The acknowledgement of professional responsibilities in curriculum development, student evaluation, and teacher education, demonstrates respect for teachers as professionals who exercise judgment in the application of skills and knowledge. Organized teachers play an integral role in education reform.

Organized teachers are influential in education in Saskatchewan. Teachers are active in communities, in politics, and as politicians. Thus, teacher involvement closely entwines the history of politics and the organization of teachers in the province. Teacher involvement forms the basis of non-partisan political relations between organized teachers and the state. Teachers stayed close to the center in designing the Saskatchewan Teachers' Federation, by adopting policies, and allocating equivalent human and financial resources to both protecting the rights of members, and aspiring to professional conduct and competence. The organization's teacher welfare and professional development programs help teachers help themselves. The Federation develops teacher leadership, encourages local autonomy, and promotes equity and collaborative decision making in education affairs. Teacher-organization leaders see themselves as collaborators

rather than adversaries. The leadership style influences members' attitude (see Poole, 1995). Various governments granted increased authority to the STF, entrusting teachers with responsibility for both public interests and teachers' collective interests.

In conclusion, the successful experience with collaboration over a long time is a powerful cultural norm in education in Saskatchewan. The tendency is to walk closer to the middle, focus on teaching and learning, build on common values, attend to collaborative processes, look to the long term, and be patient for change. The moderate approach is attributed to Saskatchewan's partnership traditions, the Federation's unitary structure, and the government promotion of cooperation. Local autonomy may contribute to the balance.

The political rationalization of relations in Saskatchewan is a reasonable fit with partner relations in the preliminary typology. The phrase, partner relations, satisfactorily conveys the nature of organized teachers and state relations in this model.

Case Comparisons

Three questions shape the inquiry regarding diverse relations between organized teachers and states and frame the comparisons among the three cases. Conclusions are noted for each section. The specific objectives for the present study follow.

1. To identify and characterize diverse relations between organized teachers and states.
2. To account for differences in relations between organized teachers and states.
3. To demonstrate the interaction of diverse types of relations between organized teachers and states with education reforms and reform processes.

The first question is answered last. Conclusions are noted for each section.

What accounts for differences in relations?

The conceptual framework (Figure 1, page 49) recognizes that the ideologies held respectively by governments and teacher unions meet within the socio-cultural context of historical relations, legal structures, and economic constraints. Individual personalities

also shape the context. The present study affirms the influence of ideological and contextual factors. Organized teachers' and states' practices also impact on their relations. Conclusions regarding the interaction among the factors follow their presentation.

Organized Teachers and State Ideologies

The present study affirms the influence of relations with the state on organized teachers' choice of strategies (see Grace, 1987; Tardif, 1995). Ideology significantly shapes relations between the state and organized teachers.

In Victoria, the Coalition Government reforms generally, including those in education, were driven by an ideology of corporatization and *privatization*. The Coalition deemed teacher unions to be irrelevant to its education agenda, effectively shut the unions out of education policy forums, and abolished the industrial relations system. The Coalition built relations with school principals and appointed individual teachers to state committees. The AEU Vic successfully sought coverage under the federal industrial relations system, and thus forced the state to meet required labour-related obligations.

Québec politics invites social unionism due to the *polarization* of power, the lack of a left-wing party, the vacuum created by centralist governments, and the focus on Québec sovereignty. Operating in a traditional hierarchy, the state determines when consultations with the teacher union will occur and, in consultation with the employer, which teachers contribute to curriculum development. The CEQ raises awareness and mobilizes the public to exert extra-parliamentary pressure on the government.

Further west in Canada, Saskatchewan is the seat of the first democratic socialist government in North America. *Cooperation* is a hallmark of how government generally does things in the province, particularly in education. Organized teachers engage in political unionism, working within the institutional framework and lobbying politicians to influence change.

In Québec and Saskatchewan, where organized teachers' relations with the state were relatively stable through the 1990s, political parties are described as centralist. In Victoria, the 1992 swing in political ideology in government was extreme. State cultural and ideological factors are summarized in Appendix G, Table GI.

The influence of the teacher union ideology on the relations also is apparent in all three cases. Union ideology determines the prioritization of issues and the strategies used to influence the state. Underpinning the AEU Vic practice of economic unionism is the belief that it is the union's role to demand and the government's role to regulate economic issues. CEQ support for the Québec national project shapes the teacher union orientation and differentiates CEQ interactions with the two political parties. The CEQ perceives education as an instrument of the state and employs a 'rapport de force' of members, or citizens, or both to influence the state. CEQ affiliation with labour contributes to a polarization of power in opposition to the state. The STF believes that society has responsibility for public education and that teachers, trustees, politicians, and others *work together* to ensure the public education system works well. The STF takes a non-partisan approach to political influencing. Members are encouraged to actively participate in the political party of their choice. The unitary structure of the STF with economic welfare and professional development roles is generally non-confrontational, gets to the middle of the spectrum, and facilitates the participation of organized teachers in education decision making.

Socio-Historical and Cultural-Linguistic Factors

History profoundly influences the relations of organized teachers with the state and the relations of organized teachers and individual teachers with society. Cultural factors also make a difference.

Citizens in Victoria have a history of acceptance of decentralization, individual choice, excellence, and economic growth through private enterprise. The promotion of private enterprise fosters voluntary union membership and invites economic unionism. Differentiated schooling is historical in Victoria. The affluent society and growing bourgeoisie paid the private school fees and resisted state involvement in secondary education until the 1950s. Victoria continues to have the highest number, among Australian states, of secondary pupils in the private sector.

In Canada, the designation of separate schools (minority Catholic or Protestant) as public schools, at the time of Confederation, lessened the perceived need for private schooling. Conflict is prominent in the history of Québec, as evident in the struggle

between the European founding nations for land, power, and language, between the Catholic Church and the state for control of education, and between the lay elite and workers for shaping the modernization of Québec. The francophone bent for philosophical debate and societal acceptance of union-initiated social action favour the development of social unionism.

Similarities are evident between behaviours in the Québec education sector and behaviours that Fukuyama (1995) identified in the French economic sector. The French preference for centralization, the tendency to withhold trust, and the propensity for labour revolt rather than incremental change, may contribute to lack of clarity in interorganization communications in Québec. Lack of feedback also exacerbates confrontational relations.

There are 330 pages of detail in the Québec provincial collective agreement, compared to the average 60 pages of combined provincial and local collective agreements in Saskatchewan. The difference exemplifies the francophone desire to codify relations in schools compared to the anglophone pragmatic approach. The relatively recent, and non-enduring agreement in Victoria, suggest that factors other than culture were at work in the creation of the extensive 1200 page document.

Saskatchewan began as a rural society influenced by a stern physical environment that demanded a spirit of community and cooperation of settlers. Politics and cooperative action are the tools Saskatchewan residents used in their search for security and stability, thus creating an environment that fosters participation and political unionism. Traditions of cooperation continue in Saskatchewan institutions and distinguish relations among organizations in the education sector. The cultural and educational partnership traditions are mutually reinforcing.

History also contributes to the formation of the actors. Both Québec and Saskatchewan replaced the leader of the governing political party in 2001. The New Democratic Party in Saskatchewan, with its origins in social democracy, is reliant upon participation. Seven leadership candidates toured the province and engaged the public in political debate. In the 1960s, with the creation of the Ministère de l'éducation, the Québec government centralized power over education in the state. Over time, the state retained many of the controlling and paternalistic attributes of the Catholic Church; so

too it seems, has the Parti québécois. The PQ acclaimed an heir apparent with no leadership competition. However, the media suggested that at least two other potential leadership candidates were discouraged or suppressed (personal recollection).

Participants in Québec and Saskatchewan note societies and individuals can no longer uniquely influence their own affairs. External pressures over which societies have no control, such as globalization, standardization, and free trade, change the nature of the dialogue. These external pressures drive the definition of problems and the implementation of solutions at home.

Legal Framework

The legal framework (Appendix G, Table GII) defines the meeting place of organized teachers and the state. The legal framework influences the distribution of power and shapes the union mandate.

Victoria experienced a radical change in the power of the teacher unions and the state due to federal legal judgments, and federal- and state-legislated changes. On one hand, changes in an Australian High Court interpretation of federal industrial relations legislation enabled teachers to seek coverage under the federal system. On the other hand, federal legislation also reduced the role and power of the Australian Industrial Relations Commission and unions. The federal legislation favoured enterprise bargaining, enabling the Coalition to define the school as the enterprise. The Coalition abolished the state industrial relations system and introduced individual and term contracts, thus undermining the role and the power of the AEU Vic. In the process, the Government of Victoria ceded its industrial powers to the Commonwealth.

In contrast, the establishment of the MEQ, the imposition of provincial bargaining, and the recognition of the CEQ as the teacher bargaining agent, centralized powers in two bureaucracies in Québec. Three main factors contributed to the polarization of power and influenced the CEQ orientation: (a) government control exercised in perceived crisis, (b) teacher union revolt following lack of success in provincial bargaining, and (c) teacher union affiliation with labour. Decentralization of some powers is expected to shift the locus of bargaining and curriculum development to

schools. The redistribution of power could diffuse the polarized relations between the state and organized teachers.

In Saskatchewan, the bi-level collective bargaining structure distributes the power among the state, local authorities, and the teachers' organization. Bi-level bargaining requires some local decisions regarding working conditions and at the same time enables teachers to talk to those holding the purse strings at the provincial level. The bi-level structure gives the STF a strong voice in dealing with the public and government. Teachers and the STF are able to give more attention to issues other than bargaining. There are few disputes at the provincial level, and this background facilitates relations among the organizations in the education sector on other matters. The Saskatchewan experience displays the anglophone preference to address the authorities directly on issues and reinforces the observation of different cultural-linguistic influences in Québec.

The legal framework determines the teacher organizations' mandate. Organized teachers in Québec and Victoria find their authority in registration as trade unions. The CEQ least emphasizes the professional aspects of the multiple interests of teachers. Economic interests dominate the AEU Vic agenda post-1992.

In Saskatchewan, organized teachers continue to operate under legislated authority. Smaller (1995/1998) observes the statutes recognizing the teaching profession in Canada contained no traditional forms of professional autonomy or control, and no access to collective bargaining. Smaller perceives the legislation did grant teacher organizations authority for disciplining teacher misconduct and served state interests very well. The CEQ, frustrated by the need for organizational change to be legislated, abandoned the professional institutional structure and opted to become a federation or centrale of unions. On the initiative of the STF, legislated amendments gradually increased organized teachers' responsibility for teacher professional conduct and teacher competency. Over time, legislation recognized teacher collective bargaining rights and teacher collective interests. Saskatchewan teachers develop, adopt, amend, and administer their own code of ethics and code of collective conduct. In Victoria, the Coalition imposed teaching standards and a code of professional conduct determined by a government-appointed committee. In Québec, teacher opinion is split with some seeking a professional order for teachers. Others recognize that boards of education have

responsibility to ensure the public interest and believe that teachers and their union should focus on improving practice.

The legislation recognizing the teaching profession is administered in Saskatchewan from the viewpoint that education is a shared responsibility. On one hand, the legislation serves state interests well. The legislation requires STF dependency on the legislature for amendments to effect organizational and even some operational change. On the other hand, the legislation has contributed to a political, societal, and professional attitude in Saskatchewan that respects teaching as a profession. The STF is an integral part of decision-making forums regarding education policy, current issues, and curriculum. The STF is represented and participates fully both in interorganization policy setting and on interorganization advisory committees.

Self-governance opportunities for the teaching profession are controlled, but nonetheless important to organized teachers. Teachers collaborate with the state and other partners in education to set criteria for teacher education programs and for the certification of teachers. Teachers collectively set goals for ethical, professional behaviour. The Federation educates its members about ethical issues specific to the teaching profession. Teachers make professional choices in their practice and provide the professional expertise on interorganization committees.

The integral role of organized teachers in decision making generally benefits education. *In a climate of mutual trust* the legislation serves the state, education, teachers, and the teaching profession well. However, Saskatchewan teachers cannot take historic relations for granted. As in the experiences with the abrupt reform in Victoria and the evolving change in Québec, the STF is vulnerable to legislated reform.

In the past, both the STF and CEQ have significantly influenced government decisions regarding education reform. The STF worked within the system. STF participated in institutional forums, employed political lobbying, and worked with other education organizations to influence state practice. The CEQ challenged the system publicly. The CEQ, finding common ground on social issues, formed coalitions with labour to influence the state. The AEU Vic was marginalized in the intended dissolution of the education system. The AEU Vic fought to survive and endeavoured to protect the interests of its members. Given the lack of an intermediate structure in the governance of

education in Victoria, the potential does not exist for allies or coalitions with trustees' or school-division administrators' organizations in the education sector; the school principals' union and professional organizations are potential allies. However, school principals generally collaborated with the Coalition. The AEU Vic relies on its ties to the national Australian Education Union and the related federal industrial coverage.

Economic Context

The economic context strains or supports organized teachers and state relations.

Late in the 1980s, issues of financial management and a recession plagued the Labor Government in Victoria. The teacher unions continued to push for their demands and appeared insensitive to the economic constraints. The economic context contributed to the downfall of the Labor Government in 1992 and provided an alibi for the Coalition to deeply cut education funding, the education bureaucracy, and teaching positions, and to close schools. Organized teachers and the state were estranged in the climate of economic restraint and the combination of centralized control and decentralized powers.

In Québec, in the early 1980s, there were high salary increases and then economic circumstances changed. Inflation dropped, state revenue lessened, and the state debt became significant. The CEQ was not open to the PQ Government's overtures to voluntarily accept cutbacks or to mutually resolve the Government's dilemma. The PQ legislated teachers back to work, diminished working conditions, and rolled back salaries the PQ had negotiated with teachers. PQ authoritarian actions undermined state relations with organized teachers. Relations have been cautious and relatively stable since the traumatic event. Lower pupil-teacher ratios and salaries, but greater employment opportunities span two decades in Québec. With no economic gains in the 1990s, CEQ members perceive the decade of overtures toward collaboration as unsuccessful.

In Saskatchewan, economic down-turns strained relations, placed a focus on the employer-employee relationship, and drove the STF union aspect more to the fore. Organized teachers accepted a decade of restraint, in tandem with general tax increases for Saskatchewan residents, to help government gain control of the provincial debt and annual deficits. However, teacher patience and trust met their limit as expressed in the sanctions imposed in 2000. Saskatchewan teachers also called for a review of the STF's

governance and bargaining processes. The challenge for teacher unions that participate in shared problem solving with the state is to find the balance among membership needs and expectations, member perception of the union role, and government needs. Government practices can support or undermine the balance.

Personalities

The personal contribution to leadership makes a difference be it positive or negative. In Victoria, Education Minister Hayward provided strong management, had a plan to organize schools, and had a determination to implement reforms. Lorraine Pagé, the first female elected as CEQ president, promoted collaborative relations with the Québec government during the 1990s. Narrowly re-elected in 1997, Pagé was criticized for being too close to the PQ political power and for using her position politically. In Saskatchewan, education organizations coalesced to oppose a deputy minister during the mid 1980s, when the deputy operated under a different value system than that on which the historic partnership in education was founded.

Teacher leadership regarding public education and the teaching profession is significant in Saskatchewan. The public perceives teachers as the most reliable source regarding education, and teachers place first in the public trust before all other occupational groups. The significance of individual actors is evident in the province where a culture of teacher leadership exists at the community level. The regard for teachers and the respect for teacher leadership are fundamental to the influence teachers enjoy in their relations with governments. The STF fosters teacher leadership, provides leadership to its own members, and selects its leaders in a way that promotes its values. STF leaders use cooperation and democratic decision-making to resolve issues. Leadership changes members' attitudes when leaders see themselves as collaborators rather than as adversaries. However, given the experiences in Québec and Saskatchewan, collaborative leadership alone is not sustainable without constructive results that benefit both parties.

Organized Teachers' Orientation

Teacher unions emphasize different aspects of teachers' multiple interests and teachers' multiple roles. Teacher union orientation is not fixed over time, or on differing issues. The context is one significant factor that shapes organized teachers orientation. All three teacher organizations identify with and espouse the goals of economic welfare, social justice, and teacher professionalism. However, the teacher unions' orientations and their practices are diverse.

In Victoria, Australia, the Coalition Government curtailed the teacher unions' roles in education policy development. In this way, the Coalition channeled organized teachers toward exclusively economic unionism. Québec teacher unionism is rooted in a professional corporation. In the 1970s, in the face of legal constraints and government authoritarian oppression, organized teachers opted for social unionism. French cultural tendencies and the revolutionary times also influenced the choice. Saskatchewan teachers attended increasingly to professional issues beginning in the 1950s. However, teachers first achieved economic security for their organization and members. Working for change from within the institutional framework, teachers in Saskatchewan exercise political unionism.

The present study affirms Okot's (1986) finding that practices more than espoused goals socially define the role of teacher organizations. A union addressing all three types of issues is more likely to maintain a balance among the roles than one with, or limited to, a singular focus.

Organized Teachers' Practices

Teacher unions employ a variety of customs and strategies to shape their practices. The Australian Education Union, Victoria Branch, relies on its constitution and historical practice to shape its strategy. The AEU Vic, like its forerunners, employs industrial and political militancy to express professional activism. In 1992, the teacher unions disregarded the Labor Government's economic difficulties and continued to press their demands. In spite of the adverse experience under the Coalition Government, the AEU Vic, in its proposed strike action on June 2001, appears similarly insensitive to the minority Labor Government's political vulnerability ("News", 2001). The Centrale de

l'enseignement du Québec fairly regularly develops five to six year action plans. The CEQ employs the mobilization of members and civil society to advocate for social issues. The strategy is used regardless of the interests and beliefs shared with the state. The public reporting of issues, public protest, and public opposition capture state attention and influence political attitudes. Legislated but self-determined objectives, and organization policy statements and bylaws guide the Saskatchewan Teachers' Federation. The STF first seeks cooperative resolutions to problems. The STF participates in ongoing collaborative interorganization decision making and engages in non-partisan political influencing. Although called upon to review organization practices from time to time (STF, 1997a), the STF has no institutionalized review mechanism. The Federation employs an annual planning cycle and conducts an administrative review of policies every five years.

Teacher union leaders are granted different tenures and conditions of service. Elected STF executive members still teach, or are in close touch with the classroom. The STF president is full time for a one-year renewable term in office, in comparison to the CEQ three-year renewable term and the AEU Vic two-year renewable mandate. The short term of the STF presidency, compared to the extended presidency in the other two cases, increases the likelihood of an educational, rather than political focus to the leadership provided.

Teacher unions mobilize their membership in a variety of ways. Membership in AEU Vic is voluntary. Teachers are called upon to participate in militant industrial and political action to support the union goals. The CEQ mobilizes its membership in a 'rapport de force' to influence public opinion and, hence, state decisions. The STF calls upon teachers primarily to engage in political lobbying campaigns, and much less frequently, to participate in militant action. In 1978, teacher concerns regarding the inadequacy of the curriculum led to a significant, ongoing provincial review of curriculum and instruction. In 1997, membership solidarity achieved a change in legislation to confer authority on the STF regarding the collective interests of teachers. With member support, the STF also established self-help, economic welfare and professional programs. The lobbying efforts of members, and the non-partisan political

influence of local association and STF leaders, create support for organization goals and show that the desired change is not just at the whim of the STF leadership.

The teacher unions differ in the stability and composition of the membership (Appendix G, Table GIII). *Teacher unions' practices both shape and reflect the composition and attitude of the membership. The stability of membership has an impact on union leadership opportunities.* The historic fragmentation of teacher unions, and the voluntary nature of union membership in Victoria, created the need for teacher unions to actively recruit members. The competitive market that causes unions to organize around members' economic needs, constrains leadership opportunities. The teacher unions' influence on education reforms has varied dependent upon the political party in power.

Québec and Saskatchewan both have bureaucratic state and teacher organizations. Both teacher organizations are perceived as influential in shaping reforms that affect public education. The two Canadian provinces had four parallel experiences in the evolution of their teacher organizations. The process and solutions to address similar challenges differ, but the results were member unification and solidarity. Three events are related to membership. One event regarding provincial collective bargaining involves both organized teachers and state practices and creates a bridge to the following section.

In 1935, due to the Federation's political lobbying and active recruitment of over two-thirds voluntary membership, the Saskatchewan government made STF membership mandatory. In 1959, the Québec government modified the law in accordance with the Rand Formula to ensure automatic teacher organization membership. Both teacher organizations enjoy stable revenue with the automatic deduction of fees at source.

The CEQ perceived school principals as management and withdrew the principals' right to membership in the organization in 1967. Principals had been excluded from membership in the Montréal teacher association since the 1940s. In January 1968, teachers in Saskatchewan lobbied the Thatcher Government to prevent the legislated removal of school principals from membership in the STF.

The CEQ expanded its membership in 1974 to include all workers in the education sector and some beyond. In 1974, Saskatchewan teachers chose to limit membership to certified teachers, contrary to the advice of the Federation leaders at the time. The closed-shop membership stance distanced some potential allies and limited the

future STF membership. The limited membership affects the organization's resource-base and leadership opportunities. However, closed membership also supports a continued organization focus on professional issues and responsibilities.

Québec and Saskatchewan have similar legal frameworks for collective bargaining. Both provinces experienced unrest and job action related to teacher bargaining in the mid to late 1960s. The Québec government imposed provincial bargaining on the CEQ. The STF sought, and following a change in government, was granted bi-level bargaining. The structures in place in both provinces enable negotiations provincially and locally. Regarding provincial bargaining, the CEQ strategy, in 1967, was to push for demands using the full extent of the dispute resolution avenues available, compared to the STF 1973 strategy to ensure a successful first round. The contrasting experiences in the introduction of, and approach to, provincial bargaining exemplify the importance of states' and organized teachers' practices.

The Dynamics of Organized Teachers and State Practices

Organized teachers and state practices have a significant reciprocal relationship with organized teachers and state relations. As one participant observes, some teacher organizations lost to government in open confrontation, and some governments took steps detrimental to teachers, so teachers moved to a more union-like response (ST19).

The forums available for an ongoing dialogue or negotiations between the state and organized teachers, or lack thereof, determine the avenues for teacher voice, and hence, shape organized teachers' practices. Organized teachers' practice within the state-provided forums also influences the relations and contributes to state strategy in a reciprocal way. The Coalition cut teacher unions out of the information flow in Victoria. Formally, and in practice, the Coalition excluded teacher union representation from state and local education decision-making forums. Only government-selected teachers serve on state committees. The Coalition exclusion of the unions left teachers without a representative structure independent of state influence. With no formal or informal meeting ground for dialogue or negotiations with the state, the AEU Vic relied upon federal industrial law and communicated directly with the public. Whether the AEU Vic strategy was instrumental in the political change is not clear. However, a minority Labor Government defeated the Coalition following two terms in power.

In contrast to Victoria, state recognition of the CEQ in Québec consolidated teacher power in a provincial teacher organization. However, the state-established collaborative forums of the 1960s were discontinued in the 1970s. Also, failing initial success with the provincial bargaining structure, organized teachers created a centrale of unions in 1974 and affiliated with labour. Other than provincial bargaining, there appears to exist no transparent, ongoing, institutionalized forum for dialogue on education issues. The volume of membership, 125,000 individuals, (and the potential of 400,000 people in solidarity with other Centrales), contributes to the CEQ capacity to exercise an effective 'rapport de force'. An effective 'rapport de force' builds public support to influence state decisions regarding social change related to education.

Less than one-tenth the CEQ membership in size, the STF is nevertheless influential politically in Saskatchewan. The state respects teachers as professionals. Various political parties in power granted increasing professional authority to teachers and their organization. The state promotes collaboration among the education organizations. Organized teachers have a voice in setting education policy and renewing curriculum. STF representatives serve on a variety of interorganization advisory committees.

The role of organized teachers in the reform process varies from an insignificant influence at the margin, to state-controlled consultations, to an integral role in education decision-making. When the teacher union is not consulted or invited to participate, the union must voice its interests through other means. In Québec, the CEQ has a limited role regarding curriculum development. Employer-identified teachers serve on curriculum committees. In a hierarchy of authority, the state consults with the teacher union on a selective basis regarding education issues. Victoria and Saskatchewan teacher unions enjoyed ongoing involvement in determining education policy throughout the 1980s. In Victoria, the Coalition perceived teacher unions to exercise excessive influence on Labor Government education decisions. The Coalition marginalized the teacher unions and removed organized teachers from any involvement in education decisions. In Saskatchewan, teacher involvement in policy setting and curriculum development is respected. Organized teachers' involvement continued through changes of the political party in power. The education organizations worked in concert to ensure reforms stayed-

the-course and survived a change in senior official leaders and ideology. Organized teachers are an integral part of the education partnership in Saskatchewan.

Conclusion

In summary, the legal framework, informal structures, and distribution of power contribute to sustaining or dislodging relations between organized teachers and the state. The structures can constrain teacher union options or constructively channel organized teachers' energies. The process is most influential. For example, how the structures are instituted and how the power is wielded through the communication flow, the creation of forums for meaningful exchange, and the short- or long-term nature of goals and strategies. Difficult economic circumstances strain relations. However, resisting or renegeing on obligations that arise from negotiations or shared problem solving, by either party engaged in the process, undermines their relations. *Organized teachers and state practices, more than the legal framework or economic context, influence their relations. Socio-historical and cultural factors shape the parties' respective ideologies and perceived strategic and leadership options.*

How do the diverse relations interact with education reforms and reform processes?

Although states adopted similar education policy in all three cases, the motivation and the process to determine reforms differed (see Swanson, 1995). This section begins with a look at the impetus for regulatory reform. Reforms and reform processes applied in the three cases are then compared by theme. Solutions to address the expectations placed on education rest on the reform of *governance* structures and on the organization of teachers' work. *Knowledge in education* largely determines teachers' work, although *accountability* measures also influence what teachers do. The section concludes with reflection on organized teachers and state roles in the different reform processes associated with the diverse types of relations.

Motivation

Benson (1996) identifies the need for political energy to overcome the inertia of the status quo and implement regulatory change. In Victoria, an overwhelming mandate for the incoming Coalition Government, a political ideological change, and international competition motivated education reforms. Economic challenges for the outgoing Labor Government facilitated public support for significant cuts in education funding. In Québec, the CEQ generated public pressure regarding the high number of school leavers and used the leverage of a provincial election to seek a public consultation on education. Economic reasons, and the desire to strengthen the francophone culture in a predominantly anglophone milieu, also motivated change. The reforms in Saskatchewan began in a time of relative prosperity and involved both the education partners and the public. Collaboration in the education sector is well established. Benson observes that an established regulatory mode is deployed pragmatically to solve new problems. The 1930s' financial crises influenced political change in Saskatchewan. Beginning in 1944, two decades of governance based on a social democratic ideology established collaborative practices in education. The synergy created by the collaborative practices of the education partnership is the source of political energy that has sustained education reform in the province since the late 1970s.

*With the political energy for reform comes *the need for ideas* (Benson, 1996). In all three cases, *previous governments began the groundwork* for some of the reforms implemented in the 1980s and 1990s. In Victoria, Labor provided two springboards for Coalition reforms. The Coalition expanded on the national curriculum and standards framework adopted by Labor. The Coalition decentralized more authority to schools, acting on a proposal by Minister Ian Cathie that Labor had rejected. In Québec, Libéral reform of the *Education Act* and amendments to the legislated framework began the regulatory changes that supported the replacement of confessional with linguistic boards of education. Reforms in Saskatchewan transcend partisan politics, continuing through two significant changes in the political party in power, and surviving a change of political agenda in the late 1980s.*

*All three cases drew on *the experience in other jurisdictions for ideas*. The Coalition ideas for reform originated in worldwide trends that were 'pushed ahead' in*

Victoria. Québec relied on international education trends reported by the Organization for Economic Cooperation and Development, the European community, and with respect to decentralization, the United States. Saskatchewan's education goals were derived from a tool provided for that purpose by the Association for Supervision and Curriculum Development (ASCD), based in the United States.

All three cases also *designed unique features*. Victoria adopted self-governing schools within the public education system. Québec introduced two-year instructional cycles. Saskatchewan created a student-centered curriculum framework.

Governance

Decentralization is favoured in all three cases, but applied differently. For example, *the site of local governance, the extent of organized teachers' involvement in governance, and the motivation for decentralization all vary in the three cases* (Appendix G, Table GIV).

Victoria and Québec shifted greater authority to the schools. Saskatchewan, following public consultations, retained a historic community-based governance structure. Boards of education are elected governing bodies that are intermediate to the state and schools; an intermediate governance level does not exist in Victoria.

There is formal provision to ensure the involvement of teachers and school principals in school governance in Victoria and Québec, although teachers serving on School Councils in Victoria are not teacher union representatives. There is no such provision at the school level in Saskatchewan. Elected rural boards of trustees and appointed urban advisory committees provide input regarding the school education program. The structure lacks a direct role for teachers; this may account for the greater incidence of confrontation at the local level. Local bargaining is the only forum common to employers and teachers for building understanding of their diverse perspectives. Traditionally, collective bargaining is an adversarial process.

In Victoria, the Coalition promoted school choice and fostered school self-governance. Québec seeks success, not just access, for the greatest number of students. The state increased local control using a balance of parent and school personnel representatives with voting rights on school governing boards. Québec appears to be

approaching a more institutionalist state model even as the government continues to maintain very tight controls on school governing boards. Saskatchewan respects historic community-based autonomy regarding public education. Local governance operates within a framework of provincial goals for education that were developed jointly among education partners and in consultation with the public.

Funding

Connell (1995) recognizes that “governments exert power over educational practice partly by legislation and regulation, partly by promoting ideologies, but above all by the power of the purse” (p. 107). *The level and source of funding for education vary in each case.*

The Commonwealth of Australia holds the taxation powers and transfers funds to the States. The transfer may be conditional upon State implementation of national initiatives. The nature of the specific transfer conditions in place during the present study was not investigated. The Coalition introduced school global budgets in Victoria with funds based 90% on enrollment and 10% on student profile. The State funds 93% of school operating costs. Schools rely on locally raised funds for the balance of their core costs and costs to supplement school activities. Schools have no stable, local source of revenue, such as taxation, to support local autonomy.

In Canada, the Federal Government transfers payments to the provinces for social programs including education. Generally the funds are not targeted. The provinces also levy income, sales taxes, and some, with Québec and Saskatchewan among the exceptions, levy property taxes. Boards of education in some provinces, including Québec and Saskatchewan, have powers to tax property.

Québec funds approximately 77% of school division operating costs. Provincial grants are based on pupil-teacher ratios and are generally unconditional. Local property taxation, limited to 15% unless approved by referendum, averages 16%. Private school fees and school fund-raising cover the remaining 7% of operating costs. Due to CEQ pressure, boards of education now distribute school-raised funds to minimize discrepancies among the quality of school programs.

Property taxation locally is unrestricted in Saskatchewan, limited only by what the property owners in the school division will bear. Based on the assessed value of property, local taxes may fund as much as 100% of school division operations. Boards of education ensure a balanced distribution of funds among schools within the division. Provincial equalization grants are distributed on the basis of student enrollment, special factors, and the boards' ability to raise funds through property taxation. The grants are intended to ensure a minimum standard of education across the province. Provincial funding accounted for 40.4% of school division expenditures in 1999-2000. In 2000, an interorganization review of education funding found that the provincial share no longer fully funded the cost to maintain the minimum standard. The committee recommended changes in the calculation of provincial grants to correct the situation.

Victoria and Québec retain the greatest centralized control through the amount of funding provided and the greatest decentralization in terms of the school authority to set its budget. Schools administer 80% of the education budget in Victoria. School governing boards in Québec have responsibility for setting their school budget within the parameters set by the board of education. Saskatchewan provides the least state funding among the three cases. Boards of education determine the degree to which responsibility for the school budget is decentralized to the schools, creating variation across the province.

All three cases experience pressures for increased school-level fund raising. Concerns about teacher and school principal involvement in and inherent inequities of school fund-raising exist in all three cases. However, in Victoria, schools rely on fund raising to support 7% of their core operating costs. Public education continues to be fully publicly funded in Québec and Saskatchewan.

Accountability

Teacher certification and conduct, teacher appraisal, and student evaluation are the accountability factors reported in Appendix G, Table GV.

Regarding *teacher certification*, in Victoria, the Coalition abolished the Teachers' Registration Board. The Board had been established in 1973 with government, school principals, and the elected teacher union representatives. Since 1992, the Department of

Education authenticates teachers' certificates for those teaching in non-government schools. In Québec, the minister certifies and can decertify teachers. The Saskatchewan Board of Teacher Education and Certification (BTEC), established in 1964, operates on the cooperative model. BTEC advises the minister. Teachers also voluntarily exercise professional responsibility for supporting and evaluating the field experience of teachers-in-training, thus ensuring the profession has some input regarding future membership in the teaching profession.

Regarding *teacher conduct and competency*, the DOE Victoria also has responsibility for the investigation and discipline of teachers against whom complaints may be laid. The Coalition created the Standards Council of the Teaching Profession of Victoria (Standards Council), an advisory structure without democratic representation that is independent of the government by law. The advisory structure includes representatives of private and state teachers, employers, and teacher training institutes. Organized teachers are not represented. The Standards Council created *professional standards and a code of ethics* for teachers and gives advice to the minister on teachers' professional issues.

In Québec, there is no professional code of conduct other than the education law. Anyone may lodge a complaint with the employer regarding the conduct of a teacher. As the employer, the board of education may take disciplinary action that ranges from issuing a warning, working with the teacher for improvement, to termination for just cause, if necessary.

Boards of education in Saskatchewan also may take disciplinary action regarding teacher conduct and competency, or boards (or anyone) may refer the matter to the STF. When a teacher is found guilty of a criminal charge, or the termination of a teacher contract for reasons of teacher competency is upheld on appeal, an automatic referral is made to the STF. Over time, various Saskatchewan governments granted the STF responsibility for: (a) teachers' ethical conduct in 1948, (b) the performance of members in 1970, and (c) the collective interests of teachers in 1997. The latter change precipitated a Federation review of teacher professionalism. The STF Council adopted bylaws in 2000 to guide teacher conduct regarding professional ethics and collective interests. A review of competency issues is underway to enhance teacher success.

There is no *teacher appraisal* in Québec. Until 1995, there was no evaluation of teachers in Victoria. During the 1970s, teachers left superintendents alone with the class, defeating the purpose of the visit. Beginning in 1995, the Coalition offered a Professional Recognition Program (PRP) to teachers in leadership roles as an over-award. The PRP linked teacher selection, remuneration, and promotion to performance. In 1996, the Australian Industrial Relations Commission incorporated the PRP in the Award, thus applying the PRP to all teachers. In Saskatchewan, where organized teachers have the greatest formalized professional responsibility and authority among the three cases, teachers also are held most directly accountable for their performance. The appraisal of teachers is linked to the actualization of the curriculum, the instrument that most directly influences the organization of teachers' work. Policies on teacher supervision and evaluation are specific to school divisions. Hence, there is a mix of approaches across the province. The STF promotes a model that places the onus on teachers for self-directed professional development.

Regarding *student evaluation*, in Victoria, the Coalition revamped the end-of-schooling credential and put in place the Learning Assessment Project with standardized testing for Grades 3 and 5. In Québec, student assessment is by provincial exams. Since 1993, Québec participates in the national School Achievement Indicators Program (SAIP) to assess language arts, science, and mathematics at ages 13 and 16. Saskatchewan teachers are responsible for the evaluation of students at every grade. At school leaving, the teacher's assessment is at least 60% of the final mark. A teacher may set the final school-leaving exam provided the teacher meets certain criteria. An interorganization committee sets the criteria. The criteria require a major in the subject area, two years teaching experience in the major, support of the employing board, and participation in an STF-sponsored accreditation seminar. Accreditation renewal is required every five years.

The curriculum assessment project, launched in 1991, was designed to assess the attainment of curriculum objectives. Curriculum assessment also contributes knowledge regarding student achievement. The provincial Learning Assessment Program (LAP), implemented in 1993, evaluates student learning in language arts and mathematics in Grades 5, 8, and 11. Since 1996, Saskatchewan also participates in SAIP. The STF

influence delayed participation in SAIP and promoted the development of a provincial indicators program. LAP and SAIP are two of several kinds of indicators upon which the evaluation of education in Saskatchewan is based.

Educational Knowledge

The education goals and curriculum framework for the three cases are noted. The processes to determine the goals, curriculum, and education policy are summarized in Appendix G, Table GVI.

Education goals differed among the three cases. Coalition reforms in Victoria pursued excellence to achieve full student potential in order to make a valuable contribution to the development of the Australian economy and society. Reforms in Québec seek to improve equality of opportunity and results, to reinforce the common culture and francophone society, and to give Québec a competitive place in the global economy. Saskatchewan aims to help students achieve their full potential and provides students with a broad general education to develop the knowledge, skills, attitudes, and values needed for further education, work, and everyday life.

The curriculum framework is similar in the three cases. Structures similar to the Saskatchewan curriculum framework were in evidence in Victoria and Québec. The terminology varies, but the concepts are the same. During 1985-1986, the interorganizational Core Curriculum Policy Advisory Committee in Saskatchewan created a curriculum framework centered on student learning rather than subjects. The framework intertwines common essential learnings with required areas of study and is supported by an adaptive dimension. The Australian curriculum framework was set in 1989 and modified for Victoria in 1993; the Québec curriculum reforms were implemented in 1997. In Saskatchewan and Québec, respectively, 20% and 25% of the curriculum may be locally determined or adapted to meet individual student needs.

Diverse processes determined the education goals, education policy, and curriculum in the three cases. In Victoria, while in Opposition, the Coalition set its objectives and action plans for dramatic education reform. The Coalition swiftly implemented sweeping changes to the curriculum and to governance and accountability structures. At the same time, the Coalition exercised significant fiscal restraint and

radically changed employment relations legislation. The latter changes undermined the unions' revenue base and distracted the teacher unions' attention from the education reforms. Québec and Saskatchewan engaged in public consultations about education reforms. Teachers and the CEQ actively called for and participated in the public consultation process, *Les états généraux*. Also, under pressure from the CEQ and others, the government belatedly granted the review committee authority to report and make recommendations. The review committee guided education goal setting in the mid 1990s. In Saskatchewan, the report on the public consultations, *Directions* (Sask Ed, 1984), set the provincial goals of education and continues to guide curriculum development.

In Victoria, the Coalition excluded teacher union representatives from *education policy* forums. In Québec, state officials, in consultation with teacher union representatives, achieve a provincial framing of education that is not apparent to CEQ members, or generally. In Saskatchewan, the three partners consistently present at the education policy table are the Department, the STF, and the Trustees' Association. Their respective roles vary depending upon the issue; their goal is consensus. Generally, although government has the authority to introduce and change legislation, participants think it unlikely that Saskatchewan would change education policy without the support of teachers.

Curriculum development is centralized in all three cases. However, the procedure to identify participants in the curriculum development process varies. In Victoria, the Coalition appointed a committee. The committee adapted the Australian curriculum framework to meet the State interests. Centralization of curriculum development introduced consistency in the program of studies. Previously, schools determined curriculum. A free market likely would retain diversity in programming and enhance teacher subject-specialization and school specialization. Québec and Saskatchewan involve all partners in education in design, field-testing, implementation, and ongoing development of the curriculum. Teachers advising the MEQ are selected in consultation with boards of education and do not represent the CEQ institutional point of view. In Saskatchewan, the Department advertises for curriculum writers. However, teachers apply care of the STF. The Department makes the final selection of curriculum writers from the names forwarded by the STF. Also, teachers identified by the STF serve on

curriculum advisory committees with representatives of other education organizations. Advisory committees participate in a cyclical model: program evaluation, design, implementation, and maintenance. The committee guides the work of the writers.

Conclusion

Both the case experience and the anticipated pattern for each model are summarized in Table XIV. In this section, similarities among the cases are briefly noted. The discussion attends to perceived discrepancies between the case experiences and the

Table XIV: Interaction of Diverse Relations with Reforms and Reform Processes

Factor	Relations (Victoria, Australia)	Labour Relations (Victoria, Australia)	Class Relations (Québec, Canada)	Partner Relations (Saskatchewan, Canada)
Political Ideology		Neo-liberal	Conservative Centralist	Social Democratic
Rationalization		Economic	Social	Political
State Regulation		Market & Authority <i>Expect only market</i>	Authority	Trust
State Strategy		Exclude unions	Consult selectively	Collaborate
Teacher Orientation Organized Teachers Strategy		Worker (Economic) Recourse to third parties: law, public	Advocate (Social) Rapport de force (Public pressure)	Professional (Political) Participate responsibly plus political lobbying
Roles in Reform (S:State, T:Teachers)		S:Central + T:Marginal <i>Expect both marginal</i>	Hierarchical S:Control + T:Oppose	Integral
Governance Decentralization		To school: Principal, parents and individual teachers Report to the state. <i>Would expect report to consumers.</i>	To school: Equal parents and school personnel vote within constraints Report to community. <i>Expect report to state.</i>	To boards of education: <i>Elected reps</i> from rural districts. <i>Would expect teacher participation and collaboration locally.</i> Report to ratepayers.
Funding		High state revenue. <i>Would expect low state revenue.</i> No local taxation capacity. Fund raising to cover 7% of core costs.	High state revenue. Limited local taxation capacity. Fund raising to supplement.	Low state revenue. <i>Would expect greater state revenue.</i> Unspecified local taxation capacity, Fund raising to supplement.
Educational Knowledge Goals		Individual potential and economic	Individual potential, cultural-societal, and economic	Individual potential and societal
Goal Setting		Imposed. <i>Would expect diversification</i>	Consultation under pressure	Collaboration
Curriculum Development		Imposed. <i>Would expect specialization.</i>	Consultation	Collaboration
Education Policy Setting		Imposed. <i>Would expect decentralized</i>	Consultation	Collaboration
Accountability Professional Knowledge		Technician. <i>Would expect specialization.</i>	Technician	Reflective practitioner
Teacher Certification and Conduct		Imposed. <i>Would expect market to determine standards.</i>	Minister responsible for certification, employer for conduct	Collaboration and professional responsibility
Teacher Appraisal		Incentives. Pay for performance	None <i>Expect standards and supervision.</i>	Supervision and professional responsibility
Student Evaluation (School leaving)		Standards. <i>Would expect competition.</i>	Standards	Professional responsibility

anticipated patterns. Education goals differed among the cases, but reforms in all three cases supported decentralized governance. All three cases centralized curriculum and employed a similar curriculum framework. In all three cases, the states introduced standardized student testing. Only in Saskatchewan do teachers retain authority to set school-leaving examinations.

The experience in Victoria is the least definitive regarding the interaction between relations and reforms. A combination of state modes of regulation clouds the analysis. Are procedures attributable to market regulation or to the authoritarian imposition of rules and standards? The historical practice in Victoria, under largely liberal governments, is school determination of the curriculum. However, contrary to the expectation of market regulation, the Coalition did not retain the diversity. The Coalition implemented a centralized curriculum, imposed standards, and curtailed the opportunity for school or teacher specialization. The Coalition also limited freedom of speech.

The Coalition required School Councils to report annually to the State. Under market regulation, it is more likely that a school would report to the client, rather than to the state. Similarly, lower state funding and greater school-generated funds would fit a market model. A peripheral state independent of society maximizes the free market. Hence, less, rather than more, state regulation is expected in labour relations. Less state control of teachers and teaching, and more teacher and school responsiveness to market demands is expected. It is anticipated the teacher union would have fewer interactions with the state and provide more support to individual teachers under market regulation. Hence, both the state and organized teachers would play a marginal role in the market-regulated reform of education.

The Québec education system during the 1970s and 1980s most closely aligns with and affirms the preliminary model for class relations. Education reforms introduced in the 1990s suggest a transition is in progress. Decentralization to school governing boards suggests a move away from a class state. The curriculum's adaptive dimension and the two-year instructional cycle require professional judgment in teaching practice, compared to the tightly prescribed curriculum in the 1980s. The surprises are (a) the lack of teacher appraisal and (b) school governing-boards' annual reports to communities. The lack of supervision is attributable to attempts to professionalize teaching in the 1960

reforms, negotiation of accountability processes, and French cultural influences. The accountability of school governing boards to their communities, rather than to the state, is a recent change and is attributable to relations in transition. The government retains control of school governing-boards' powers through a tight regulatory framework. The government selectively consults the teacher union. Traditional hierarchical authority structures continue to exemplify class relations in Québec.

Given the stability of relations over time, the Saskatchewan case is the most reliable predictor of the interaction between relations and reform processes. Organized teachers and the state have roles integral to the reform of education, along with other partner education organizations. Three experiences are unexpected in partner relations. The surprises are (a) the low level of state funding, (b) the lack of teacher representation in local school governance, and (c) the lack of uniformly collaborative relations at the local levels when collaboration predominates at the provincial level.

The low state funding of 40.4% compared to historic levels near 60% may be attributable to several factors. A decade of restraint to address provincial debt accumulated due to deficit budgeting in the 1980s, a shrinking provincial tax base, lack of provincial powers to tax property, and government priorities outside of education are all factors that influenced education funding levels.

The collaboration characteristic of relations provincially among the education partners is not consistently replicated at the local level between employing boards of education and teachers. Two decades of CCF political influence established collaboration at the provincial level among organization leaders. Diverse governments recognize the STF as a professional organization and respect teacher professional expertise. The factors cementing collaborative partner relations include the 1980s-1990s curriculum and instruction review, the personal dimension of the actors' relations, and the continuity and persistence of personnel. Neither projects, such as curriculum renewal, nor leadership is so enduring at the local level. Nor is there a forum, such as interorganizational committees or a teacher role in school governance, to support ongoing dialogue.

Table XV: Correlation between Type of Relation and Role in Education Reform

State Regulation Organized Teachers	Market (Incentives)	Authority (Unique Control)	Trust
Protect	Labour Relations (Individual goals) Marginal roles		
Oppose		Class Relations (Collective goals) Hierarchical roles	
Trust			Partner Relations (Shared goals) Integral roles

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Employer-employee relations are more frequently emphasized locally, compared to the integral roles of organized teachers and the state in provincial-level reform initiatives.

Labour, class, and partner relations contribute to diverse roles for organized teachers and the state in the reform of education (Table XV). Market regulation would likely be characterized by marginal roles for both the state and organized teachers. Regulation by authority creates roles in a hierarchical relationship. Organized teachers seek avenues to give teachers a voice under power relations based on domination. Regulation by trust, that is, power relations based on participation, leads to integral roles in education reform for both organized teachers and the state.

How can organized teachers and state relations be characterized?

A typology facilitates an explanation of relations between organized teachers and states in the present study. The diverse types model the perfect conception of each exclusive relation. The models propose ideal-typical, not ideal, relations. No one type fully explains or describes any one case experience. Organized teachers and state relations are dynamic, changing both over time and regarding issues.

In all three cases, organized teachers' relations with states are influenced by membership, closely entwined with circumstance and the socio-political climate, and dependent upon personalities and issues. Relations in Québec and Saskatchewan vary considerably across time rather than with a particular political party. The experience in all three cases saw relations closely linked with the state political ideology and mode of regulation. The teacher union orientation, the union priorities, and the union practices also influenced the relations.

Labour relations focus on the exchange of individual teacher labour for incentives. Facilitation of a free market and decentralized policy and curriculum setting characterize state ideology and practices in this model. Such characteristics lead to no formalized relations between the state and teachers collectively. The connection becomes the relationship between the acting employer and the individual teacher. The teacher union is marginalized and must find ways to capture and enforce state attention to organized teachers' issues. The union scope is limited. Economic unionism seeks to protect teacher's interests. The experience in Victoria, where the AEU Vic relied on third party intervention to resolve disputes, demonstrates some characteristics of labour relations. However, the state took an authoritative rather than marginal role to determine educational knowledge and accountability measures.

Class relations rest on traditional hierarchical authority structures. Regulation by authority and centrally determined policy and curriculum characterize state practices in this model. The state imposes rules and consults organized teachers only on a selective basis. Organized teachers pursue goals on behalf of teachers' collective interests. Social unionism uses the social milieu to influence public opinion and sway the state. The experience in Québec, with a polarization of power in two bureaucracies, state consultation, and the CEQ reliance on a 'rapport de force' to influence the state, exemplifies the hierarchical authority structure in class relations.

Partner relations require ongoing involvement. Shared goals, mutual trust, and consensus building to determine policy and curriculum characterize state and organized teachers practices in partner relations. The state invites participation and organized teachers work within the institutional framework. Such is the case in Saskatchewan where the STF is an integral part of making decisions regarding education.

Ultimately, there are employment relations in all three cases. To some degree union strategies, state ideology, the economy, and the market influence the contractual relationship. Teachers in Victoria resorted to the federal industrial-relations system to resolve grievances and to achieve minimum standards in the form of awards. Québec teachers prioritize negotiations on a cyclical basis and use public influence to support their demands. Saskatchewan relations became adversarial at times regarding collective bargaining. In all three cases, collective bargaining or arbitration provides an important forum for the resolution of economic welfare and education policy issues.

There is no one ideal relation. Relations are shaped by the parties' ideologies and responsive to the context and the circumstances. The state holds the authority in the relationship. States exercise their authority in a variety of ways. The strength of organized teachers lies in the capacity to draw on a variety of strategies to address a particular problem in a given context or to pursue a particular goal.

The Typology

As discussed, affirmation of the preliminary typology rests on a combination of deduction based on historic practices and observation of the 1990s' reforms and reform processes (Table XVI). One substantive change to the typology is the recognition that no formalized relation exists between organized teachers and the state in a free market. The market relies upon checks and balances among employees and employers, with limited roles for the state and organized teachers. Teacher unions aim to protect and support members to offset the extremes of the free market, rather than to proactively negotiate employment conditions. The parties' roles in education reform are added.

Table XVI: A Typology of Organized Teachers and State Relations

Relations	Labour	Class	Partner
Context			
Theory			
Power Relations	Domination		Participation
Rationalization	Economic	Social	Political
Observation (State and Organized Teachers Roles)			
Roles in Reform	Marginal	Hierarchical	Integral
State			
State Structure	Peripheral	Class	Institutionalist
Education Goals	Meritocratic	Reproductive	Transformative
Regulation	Market	Authority	Trust (Mutual)
Technology			
Organization Structure	Decentralization	Centralization	Bi-level
Means of control	Competition, efficiency, incentives	Rules, standards, supervision	Empowerment: shared responsibility, invited supervision
Motivation for Decentralization	Economic	Bureaucratic	Social democratic
Organized Teachers			
Interests	Worker	Advocate	Professional
Goals	Individual	Collective	Shared re education
Influence	Protect	Oppose	Participate
Unionism	Economic	Social	Political
Knowledge			
Educational (Curriculum)	Teacher choice constrained by client	Government prescribed	Government and teacher joint development
Professional	Disciplinary specialist	Technical knowledge, rules	Pedagogical and content knowledge plus judgment
Exchanged for	Clients/ Employment	Wage	Status
Teacher as	Specialist	Technician	Reflective practitioner
Shirley M. Humphries (2001) ©			

Questions for Future Research

A number of questions arise from the present study and merit consideration for future research. Four themes for further study follow.

1. Seddon and Brown (1997) observe, “that both advocates and critics of decentralising reforms put professionalism at the core of teachers’ work” (p. 27). The relevance of teaching as a profession is an enduring question. Historically, the massive number of teachers and the feminization of the profession contributed to tight external and administrative controls on teachers and an undervaluing of teachers’ work. The concept of the individual professional teacher, rather than the teaching profession, raises questions. Where does responsibility rest for the definition of the teaching profession? How does the evolution of the teaching profession compare in each of the following three situations? (a) Individual professionalism is promoted, and there is no strong organization of teachers. (b) Government-imposed structures regulate the profession. (c) Organized teachers actively pursue professional development and assume responsibility for professional conduct. What is the impact on teaching practice in each situation? What recommendations can be made regarding the appropriate professional model for teachers?

2. The presence or absence of teachers’ voice in education decisions has a bearing on education reform. The presence of teachers’ voice strengthens the opportunity for an education emphasis and develops a degree of teacher ownership to implement reforms. What links exist between organized teachers and state relations and the actualization of curriculum reforms? What is the range of variation in school programs across a state or province within a centralized curriculum? Are variations attributable to: (a) differences in state funding levels, (b) governance structures, (c) relations between organized teachers and the state, or (d) the involvement of union representatives rather than state-appointed teachers? What other factors influence the implementation of centrally determined curriculum?

3. School principals are key leaders in education reform. The principal’s role and individual value system are significant factors in the operation of schools. The membership of principals in teacher unions varies. What role do school principals play in

shaping the relations of organized teachers and the state? What is the influence of principals who are members of the teacher organization? What is the influence of principals when government bars them from membership in the teacher union, or when organized teachers deny principals membership? Is there an accentuation of conflict between management and educator roles in schools when principals are excluded from the teacher union?

4. The chance contribution of one individual who had no work experience in the public education system demonstrated a resource for future research. Regarding organized teachers and state relations, in what ways are the perceptions of individuals who are external to the system consistent with the perceptions of individuals who work within the system? In what ways do their perceptions differ? In what ways can the external perceptions inform the relations and support democratic communities?

Closure

It is with caution that I propose a typology of organized teachers and state relations. The diverse relations presented are ideal-typical models, not ideals. Organized teachers have multiple interests. No one style of relations falls entirely in only one category. Hence, the models are presented in overlapping circles in Figure 5. Nor is it my intent to stereotype relations. *Relations are dynamic*. The strength of organized teachers, and states as well, lies in their capacity to draw on a variety of strategies to address any particular problem in a given context. However, comparison consciously framed by specific problems and theoretical perspectives can deepen knowledge.

Various authors call for the reform of teacher unions. With thought and commitment, people and states can change their institutions. The typology offers a guide to understanding relations between organized teachers and states in democratic western industrialized nations. Although the organized teachers-state connection is established in law, the relations are shaped largely by practice. Political ideology and teacher union orientation, history, and socio-cultural factors influence practice. No one conception of teacher unionism fits all circumstances. Change in teacher unionism is unlikely without

related contextual and regulatory changes. Understanding relations in education can assist

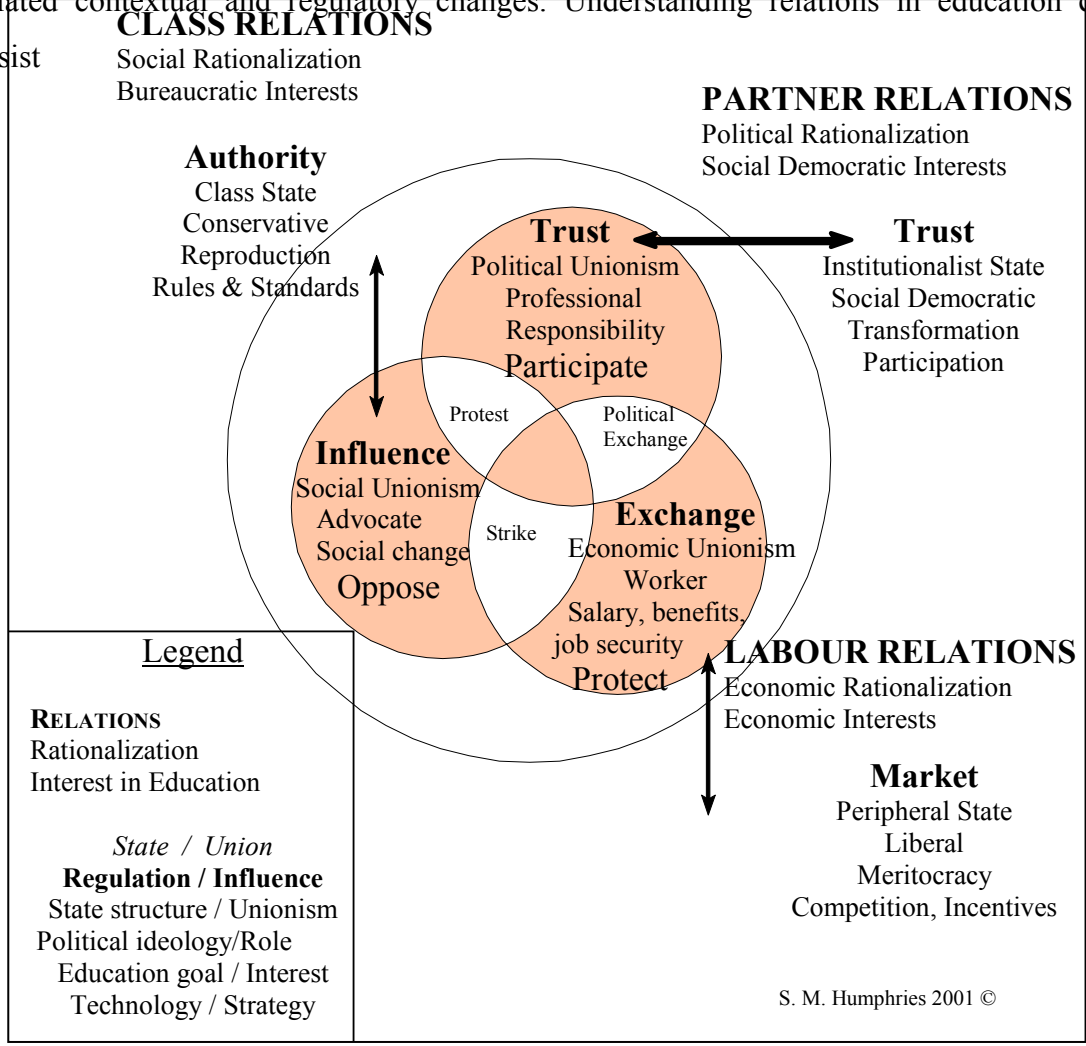


Figure 5: Three Types of Organized Teachers and State Relations

states and organized teachers to appreciate their respective roles in the maintenance of democratic societies through the reform of public education.

As I bring closure to this thesis, our world is shaken by terrorists' willful destruction and the accompanying loss of civilian life. The tragedy experienced in the daily life of people in many countries internationally has been tasted in North America. Understanding our respective histories, appreciation of our differences, and international peace begin with each of us. To teach problem solving, involvement, and cooperation, school systems must genuinely practice and model the skills at all levels of the system. May we find ways to support democracy, celebrate diversity, and develop in the leaders of the future, the means to achieve international peace and global harmony. Respectful and constructive relations among those charged with responsibility for the education of our youth is a beginning.

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Legislation

Australia

Commonwealth

States Grants (Primary and Secondary Education Assistance) Act, 1996

Workplace Relations Act, 1996

Industrial Relations Reform Act, 1993

Industrial Relations Act, 1988

National Trade Union Act

Teaching Service Act 1983

Teaching Service Act 1946

Victoria

Employee Relations Act, 1992

Public Sector Management Act, 1992

Teaching Service Order 140, 1993 under the Teaching Services Act

Education Act, 1910

Education Act, 1958

Agreements:

The consolidated agreement on conditions of employment in the government teaching service between the DSE and the FTUV and the VSTA, September 1992

Agreement between the Education Department and the three teacher unions, 1984 (signed 1983)

Awards:

AW799899-"Teachers_ (Victorian Government Schools) Conditions of Employment Award, 1995. " AWARD: AW799899

V0094—Victorian Teachers Redundancy Award, 1994

Canada

Federal

Canadian Charter of Rights and Freedoms, Part I of the Constitution Act 1982 being Schedule B of the Canada Act 1982 (U.K.), 1982

Constitution Act, 1867 (U.K.), 30 & 31 Vict., c. 3 (formerly British North American Act, 1867).

Act of Union, 1841

Constitution Act, 1791

Québec Act, 1774

Treaty of Paris, 1763

Québec

Bill 164, Loi créant la corporation générale des instituteurs et des institutrices Catholiques de la province de Québec [The law creating the Corporation of Catholic Instructors of Québec]

Bill 25, 1967

Le code de travail du Québec [The Québec Labour Code]

Act Respecting the Conseil supérieur de l'éducation, R.S.Q., c. C-60.

Education Act, R.S.Q.,

Act to Amend the Law Respecting Education in this Province, S.Q. 1869, c. 16.

Entente intervenue entre le comité patronal de négociation pour les commissions scolaires francophones (CPNCF) et la Centrale de l'enseignement du Québec (CEQ), [Agreement between the Patrons' Negotiating Committee for the Francophone School Divisions and the Québec Centrale of Teaching]

Saskatchewan

Education Act 1995, 1978

Foundation Grants Act, 1970

Act Respecting the Teaching Profession, 1935

Provincial Collective Bargaining Agreement, 2000-2002

APPENDIX A -- CORRESPONDENCE**Invitation to Participate**

Date

BY FAX

Dear :

Re: Doctorate Research

I am seeking your participation in the research project, "Types of relations between the state and organized teachers: The impact on education reform," in partial fulfillment of a Doctorate in Educational Administration with the University of Montreal.

Enclosed is a summary of the background, the purpose, objectives, and research method of my study, an interview guide and a consent to participate form. I would appreciate an interview in February. If you have questions, please contact me by electronic courier at humphris@magellan.umontreal.ca, by telephone at 514-341-6275, or contact my faculty advisor, Claude Lessard, Ph D at 514-343-7444 or lessardc@SCEDU.umontreal.ca.

Please contact me at 514-341-6275 to make arrangements. I will also try to telephone you the week of February 15, 1999.

Sincerely yours
Shirley M. Humphries
Student, University of Montreal

2930 Edouard Montpetit #204
Montreal QC H3T 1J7
Home Phone: 514-341-6275
E-mail: humphris@magellan.umontreal.ca

Summary Background of Proposed Research

“Types of relations between the state and organized teachers: The impact on education reform”

Linked to competition in global markets, the impetus for the reform of education internationally since the mid 1970s has emerged from interests external to the education system and is primarily economic. Education, once touted as a source of prosperity is maligned for economic failures. Criticisms imply that links between education and industry need to be strengthened. As management seeks flexibility and creativity to gain a competitive edge in international markets the nature of work and work organization change. The demand on schools is to improve the intellectual competence of graduates not just the number of graduates.

Work and education are entwined in political and social as well as economic structures. Publicly funded (public) education exists in this system of interdependent relationships and challenges, no one of which can be addressed independently of the others. Teachers' unions are an integral part of the education system and their evolution is important to the development of education and the teaching profession.

The organization of public school teachers has had an impact internationally on public elections, education policy, and school organization. Conversely, a nation's institutions and education policy shape the strategies available to organized teachers. Since the advent of government initiated education reforms based on an economic ideology differing from the egalitarian objectives traditionally espoused by teachers, internationally education unions perceive a need for renewed advocacy for public education and teacher professionalization. Many also experience legislated changes that reframe labor laws, renege on collective agreements, and diminish teachers' unions' mandate in governments' efforts to control education reform. In contrast, in some sites there were no legislated disruptions to unions.

Education reforms have been initiated internationally, generally by governments, in the following areas: a) the locus of education governance (centralization/ decentralization, linguistic or confessional groupings/privatization/marketization); b) accountability measures: student evaluation, teacher appraisal, system assessment; c) professionalism: initial and continuing teacher training, teacher certification or registration and decertification, teacher career opportunities, professional development, curriculum development, teacher research; d) teacher unionism: change to teacher unions' mandate, structure, processes, and membership.

The purpose of the current research is to examine the ways in which the types of relations between governments and teachers' unions have an impact on education reform and hence, in this circular relationship, influence the future of teachers' work and teachers' unions. Understanding the influence of state and organized teachers relations on the process and the nature of education reform can assist governments and teachers' unions to appreciate the importance of the respective roles in education reform and to assess and cultivate relations to the benefit of public education. The specific objectives for the current study follow: To determine a) the influence of the relations between the government and the education union on education reforms and b) the influence of relations between government and the education union on union and education decision making. c) To identify the implications for education unions arising from education reform.

The procedure proposed for the current study is an analysis of three types of state and organized teachers relations: those in Québec, Saskatchewan, and the state of Victoria in Australia. The methods proposed are document reviews and an analysis of interviews with a sample of past and present leaders in public education.

Consent to Participate in Research

I, _____, am willing to be interviewed for the research project, “Types of relations between the state and organized teachers: The impact on teachers’ work, education unions, and participation in education reform,” in partial completion of a Doctorate in Educational Administration at l’Université de Montréal under the supervision of Claude Lessard, Ph D (514-343-7444). I know that I may withdraw from the study at any time and will inform Shirley Humphries of such a decision.

I understand that the purpose of this interview is to obtain my opinion on issues regarding the relationship between the government and the teachers’ union and the impact of that type of relationship on the education reform process and education reforms. I understand that my contribution is confidential and that only Shirley Humphries has access to the list linking my name and code and that the list will be destroyed on completion of the current study.

I will be interviewed by Shirley Humphries and will receive a summary analysis of my views to review, verify and return to her in the envelope that will be provided:

I **am willing** to have the interview tape recorded.

I am **not** willing to have the interview tape recorded.

I wish the data to be managed as indicated by the following choice:

Shirley Humphries is to **destroy** the tape and written summary of my opinion immediately following acceptance of her dissertation by the University of Montreal.

Shirley M. Humphries is to **destroy** the tape. The written summary may become a permanent part of the education union or university **archives**.

I am willing that the tape and written summary may become a permanent part of the education union or university **archives**.

Date

Signature

Interview Guide

Types of relations between governments and organized teachers:

The impact on education reform.

A. Interviewee Background in Public Education

1. Identify your current position; describe your experience in or association with education.

B. Change in Education

2.
 - a) What reforms are being considered or implemented in your province or state?
 - b) What initiative do you consider most significant and why?
3.
 - a) In the education reform process how is education policy developed, adopted, and implemented? Identify the role of teachers and the teachers' union in the process.
 - b) How has the process changed from pre-reform (pre-1980)?

C. Government/Teachers' Union Relations

4.
 - a) What is your perception of the predominant relations between government and the education union: i) over the years? ii) during the education reform process?
 - b) What is the foundation for or the primary focus of the agenda for government and the teachers' union?
 - c) Are the type of relations and the agenda stable in spite of changes in the political party in power?
5.
 - a) In what ways have the relations between the government and the teachers' union influenced: i) the nature of education reforms? ii) the education reform process? iii) the teachers' union choice of strategy?
 - b) Describe your reasoning for your responses.

Invitation à participer

Le 4 mars 1999

Monsieur/Madame,

Objet : Entrevue et utilisation des données

Je vous suis reconnaissante de bien vouloir participer au projet de recherche «Les divers types de relations entre l'État et les associations d'enseignants : leurs répercussions sur la réforme de l'éducation», exécuté en vue de l'obtention d'un doctorat en administration de l'éducation à l'Université de Montréal. Vous trouverez ci-joint un résumé de l'état de la question et du but, des objectifs et de la méthode de recherche concernant mon étude et les questions que je vous poserai au moment de l'entrevue. Si vous avez des questions, n'hésitez pas à me téléphoner au (514) 341-6275 ou communiquez avec mon superviseur, Claude Lessard, Ph. D., en composant le (514) 343-7444.

Veillez lire le formulaire de consentement relatif à l'entrevue et à l'utilisation des données. Prière d'indiquer si vous souhaitez que les données soient détruites après l'acceptation de mon mémoire par l'Université de Montréal, ou si vous consentez à ce qu'elles soient entreposées dans les archives de l'université et veuillez y inscrire la date et y apposer votre signature. Vous me remettrez ce formulaire au moment de l'entrevue.

Veillez m'aviser si vous décidez à un moment quelconque de vous retirer de cette étude.

Je serai heureuse de vous rencontrer à __h le _____ 1999 au _____.

Veillez agréer, Monsieur/Madame, l'assurance de mes meilleurs sentiments.

Shirley M. Humphries
étudiante, Université de Montréal

2930, boul. Édouard-Montpetit, app. 204
Montréal (Québec) H3T 1J7

Tél. à la maison : (514) 341-6275
Courriel : humphris@magellan.umontreal.ca

Résumé

«Les divers types de relations entre l'État et les associations d'enseignants : leurs répercussions sur la réforme de l'éducation»

Rattachée à la concurrence sur les marchés mondiaux, l'attention portée à la réforme de l'éducation à l'échelle internationale depuis le milieu des années 1970 émane d'intérêts extérieurs au système éducatif et d'un souci principalement économique. L'éducation, autrefois louée comme source de prospérité, est aujourd'hui décriée comme responsable de l'échec économique. Ces critiques sous-entendent que les liens entre l'éducation et l'industrie doivent être renforcés. Comme les gestionnaires recherchent la souplesse et la créativité pour se mériter un avantage concurrentiel sur les marchés internationaux, la nature du travail et l'organisation du travail changent. On demande aux écoles d'améliorer la compétence intellectuelle des gradués, et non seulement d'augmenter le nombre de gradués.

Le travail et l'éducation sont étroitement liés aux structures politiques, sociales et économiques. L'éducation publique, subventionnée à même les fonds publics, existe dans cette interdépendance de relations et de défis, qui ne peuvent être traités indépendamment l'un de l'autre. Les syndicats d'enseignants font partie intégrante du système éducatif, et leur évolution est importante au développement de l'éducation et de la profession enseignante.

Le regroupement des enseignants d'écoles publiques a eu un effet partout dans le monde sur les élections publiques, les politiques éducatives et l'organisation scolaire. Vice versa, les établissements nationaux et les politiques éducatives façonnent les stratégies accessibles aux associations d'enseignants. Depuis l'avènement des réformes éducatives amorcées par les gouvernements et basées sur une idéologie économique éloignée des objectifs égalitaires traditionnellement préconisés par les enseignants, les syndicats internationaux d'enseignants perçoivent le besoin d'un renouveau du militantisme en faveur de l'éducation publique et de la professionnalisation des enseignants, tandis que beaucoup sont aussi confrontés à des changements législatifs qui replacent dans une nouvelle perspective les lois du droit du travail, renient les conventions collectives et diminuent le mandat des syndicats d'enseignants dans les efforts gouvernementaux pour contrôler la réforme de l'éducation. À certains endroits, par contre, aucune perturbation législative n'a touché les syndicats d'enseignants.

Les réformes ont été amorcées au tour du monde dans les domaines suivants: a) le lieu de la gestion de l'éducation; b) les mesures de l'imputabilité : évaluation de l'élève, évaluation de l'enseignant, évaluation du système et communication des résultats; c) la professionnalisation: les perspectives de carrière pour les enseignants, le rôle des enseignants et du syndicat d'enseignants dans l'élaboration du programme d'études, la recherche d'enseignants, le perfectionnement professionnel, la formation des enseignants, la certification des enseignants et le professionnalisme des enseignants; d) la syndicalisation: changements législatifs touchant le mandat, la structure et l'effectif des syndicats.

Le but du présent projet de recherche est d'examiner les façons dont les types de relations entre les gouvernements et les syndicats d'enseignants se répercutent sur la réforme de l'éducation et, par conséquent, dans cette relation circulaire, influent sur l'avenir du travail des enseignants et des syndicats d'enseignants. Une bonne compréhension de l'influence des relations entre l'État et les associations d'enseignants sur la nature et le processus de la réforme scolaire peut aider les gouvernements et les syndicats d'enseignants à apprécier l'importance de leurs rôles respectifs dans la réforme de l'éducation et à modeler et cultiver leurs relations dans l'intérêt de l'éducation publique.

Les objectifs spécifiques de la présente étude sont les suivants : 1. Déterminer l'influence des relations entre le gouvernement et le syndicat des enseignants sur les réformes éducatives. 2. Déterminer l'influence des relations entre le gouvernement et le syndicat des enseignants sur le syndicat des enseignants et la prise de décision dans le domaine de l'éducation. 3. Identifier les répercussions de la réforme éducative sur les syndicats d'enseignants. La marche à suivre proposée pour la présente étude est une analyse comparée de trois relations: celle qui prévaut au Québec, celle de la Saskatchewan, et celle de l'état de Victoria, en Australie. Cette recherche sera documentaire complétée par une analyse des entrevues effectuées auprès d'un échantillon constitué de dirigeants anciens et actuels de syndicats d'enseignants, de membres de la haute direction des ministères gouvernementaux de l'éducation, d'administrateurs d'arrondissements scolaires, de commissaires d'écoles influents et de membres du corps professoral d'établissements de formation des enseignants.

Consentement à participer à la recherche

Je, _____, consens à être interrogé(e) dans le cadre du projet de recherche «Les divers types de relations entre l'État et les associations d'enseignants : leurs répercussions sur le travail des enseignants, les syndicats d'enseignants et la participation à la réforme de l'éducation», exécuté en vue de l'obtention d'un doctorat en administration de l'éducation à l'Université de Montréal sous la supervision du Claude Lessard, Ph. D. [tél. : (514) 343-7444]. Je sais que je peux me retirer de cette étude à tout moment et, le cas échéant, j'en aviserai Shirley Humphries.

Je comprends que le but de cette entrevue est de recueillir mon opinion sur des questions concernant la relation entre le gouvernement et le syndicat des enseignants et les répercussions de ce type de relation sur le processus de réforme de l'éducation et les réformes scolaires. Je comprends que mon apport est confidentiel, que seule Shirley Humphries a accès à la liste associant mon nom à un numéro de code et que cette liste sera détruite à la fin de la présente étude.

Shirley Humphries m'interrogera et m'enverra, par la suite, une analyse sommaire de mon opinion, que je devrai vérifier et lui retourner dans l'enveloppe fournie.

J'accepte que l'entrevue soit enregistrée sur bande magnétique.

Je **refuse** que l'entrevue soit enregistrée sur bande magnétique.

Je désire que les données soient traitées comme suit (cochez votre choix) :

Shirley Humphries devra **détruire** la bande magnétique et le résumé écrit de mon opinion immédiatement après l'acceptation de son mémoire par l'Université de Montréal.

Shirley Humphries devra **détruire** la bande magnétique. Le résumé écrit de mon opinion pourra être inclus de façon permanente dans les **archives** de l'université ou du syndicat des enseignants.

J'accepte que la bande magnétique et le résumé écrit de mon opinion soient inclus de façon permanente dans les **archives** de l'université ou du syndicat des enseignants.

Date

Signature

Guide d'entrevue

DONNÉES DE BASE

Précisez le poste que vous occupez présentement. Décrivez votre expérience de travail en ou votre association avec éducation publique.

RÉFORMES DE L'ÉDUCATION

1. Dans quels domaines les réformes scolaires sont-elles envisagées ou appliquées?
2. Dans le processus de réforme scolaire, comment la politique de l'éducation est-elle élaborée, adoptée et mise en application ? Commentez le rôle des enseignants et celui du syndicat dans toutes ces étapes.
3. Comment le processus d'élaboration, d'adoption, et d'implantation de la politique de l'éducation a-t-il changé relativement à ce qu'il était avant la réforme (avant 1980)?

RELATIONS

4. Comment caractérisez-vous, les principales relations entre le gouvernement et le syndicat des enseignants : a) au cours des ans ? b) pendant le processus de réforme éducative?
5. Quel est le thème principal à l'ordre du jour pour le gouvernement et le syndicat ?
6. Le type de relations et les questions à l'ordre du jour demeurent-ils les-mêmes malgré les changements de parti politique au pouvoir ?
7. De quelles façons les relations entre le gouvernement et le syndicat ont-elles influé sur : a) la nature des changements en éducation? b) le processus de réforme scolaire? c) le choix d'une stratégie par le syndicat?

Développez votre raisonnement.

Authorization to Use Data Collected in 1996 and 1997

06/04/99

First Name~ Name~

Address~

Dear First Name~:

I am seeking your permission to use the data from my interview with you for my research in partial fulfillment of my Masters of Education. The data will be used in the research project, "Types of relations between the state and organized teachers: The impact on education reform," in partial fulfillment of a Doctorate in Educational Administration with the University of Montreal.

Enclosed is a summary of the background, the purpose, objectives, and research method of my study and a consent to participate form. I would appreciate a response by April 28, 1999. If you have questions, please contact me by electronic mail at shirley.humphries@accglobal.net; by telephone at 514-341-6275 or contact my faculty advisor, Claude Lessard, Ph D at 514-343-7444 or lessardc@SCEDU.umontreal.ca.

Yours sincerely,

Shirley M. Humphries
Student, Université de Montréal

Consent to Participate in Research

I, _____, am willing that data collected for research in 1996 or 1997 in partial fulfillment of a Masters of Education with the University of Victoria may be used by Shirley M. Humphries for the research project, "Types of relations between the state and organized teachers: The impact on education reform." This project is in partial completion of a Doctorate in Educational Administration at the University of Montreal under the supervision of Claude Lessard, Ph D (514-343-7444).

I know that I may withdraw from the study at any time and will inform Shirley Humphries of such a decision (514-341-6275).

I understand that data will be used that depict the Saskatchewan context, the relationship between the government and the teachers' federation, and education reform. I understand that my contribution is confidential and that only Shirley Humphries has access to the list linking my name and code. The list will be destroyed on completion of the study.

Date

Signature

Shirley M. Humphries
 2930 Edouard Montpetit #204
 Montreal QC H3T 1J7
 Telephone or Facsimile: 514-341-6275
 E-Mail: shirley.humphries@accglobal.net (temporary)

APPENDIX B -- PARTICIPANTS

Victoria, Australia

ORGANIZATION	PARTICIPANT	EXPERIENCE
Government:	Joan Kirner (Labor)	Parent Association 65-80; Govt 82-92, Minister of Education 87-89; Premier 90-92
Department:	Don Hayward (Coalition)	General Motors Manager AU, Philippines, SE Asia; Govt 79-96, Minister of Ed 92-96
	Senior Bureaucrat	Career public servant 86-->
	Jack Keating PhD	Teacher 66-85; VSTA staff 85-87; Political advisor 87-93; Teacher educator 93-->
	Rob Clancy	Teacher 14 yrs, private company; private school; Political advisor 93-97; Consultant 98-->
ACE	Susan Pascoe	Teacher; Catholic Schools Consultant; CSF Committee; ACE President 97-99
VPF	Ian Linnett	Teacher; Principal ; VPF President 97-->
	Elementary Principal	Teacher 61; Principal 14 years; VPF member
	Secondary Principal	Teacher; VASSP member
Teacher education	Andy Spaul PhD	Reader Faculty of Education, Monash University 72-->
AEUVic Members	Alan Taylor	Teacher 71-86; Senior Teacher 87-88; Officer VSTA 89-91; Secondary Principal 92-->; President AEUVic Principal Class Association,
	Professional Assoc Pres	Teacher 69; VATE 81-->; Executive Director JCSA 99-->
	Local President	Teacher 69; One union sub-branch president primary (Librarian)
	Six teachers from a secondary school	One union sub-branch president secondary, Law, Leading Teacher, Resource, Textiles, Time tabling
AEUVic President	Mary Bluett	Teacher 76->, President AEUVic 1997-->
Administrative Staff	Rob Glare	Teacher 61, Secretary AEUVic 1997-->
	Research Officer	Teacher; Union research officer
	Research Officer	Teacher; Administrator, Union research officer
AEU President	Sharan Burrow	Teacher 76; Union organizer 86; National President 92-->
Administrative Staff	Research Officer	Teacher in UK 80, Canada 87, AU 90; AEU staff 96-->

Québec, Canada

ORGANIZATION	PARTICIPANT	EXPERIENCE IN EDUCATION
Government:	Minister of Education PL	Catholic Action 45-63; Editor Le Devoir (62)64-78; Leader Parti Libéral 78-82; Govt 82-94, Minister of Education 86-90
Department:	Pauline Marois PQ	Govt 94-->; Minister of Education Feb 96- 98; Minister of Health 98-->
	Pierre Lucier	Teacher (date?); Assoc Dep Min Ed 80-84; President CSE 84-89, Pres CU; Dep Min Ed 90-96; Pres UdeQ 96-->
	Robert Bisailon	Teacher secondary 70-77, primary 84-88; Elected union positions 77-84; President CSE 88-95; Co-president États généraux (18 mois); Assoc Dep Min Ed 97-->
Directors of education	Claude Pagé	Career bureaucrat ?, MEQ 1990-->
	Gilles Taillon	Teacher 67; Human resources 76-81 ; MEQ Finance 81-86; Health Commission 86-?; D of Ed ?-96; President Directors 93-96; President Conseil des Patrons 97-->
FCS AMDES	Jacques Lusignan Personnel Director	Teacher 1964; Assistant Director Montreal Catholic Board 70-95; Faculty UdeM 95-99 Teacher 65; Personnel Director 70-->
	Jean-Pierre Hillinger Pierre Émery Elementary Principal	Teacher 66; Director of personnel , general secretary 71; Assistant Director FCS Teacher & Principal 68-80; President Association of Montreal Principals full time 96--> Teacher; Principal
Teacher education	Norman Henchey PhD Claude Lessard PhD	Teacher 1956; Teacher educator McGill University 70-91, Professor Emeritus Sociologist and teacher educator UdeM 1970 -->
CEQ President	Lorraine Pagé	Teacher 68-87, CEQ 87--> , President 88-99
FSE President	Luc Savard	Teacher 75, Local President 82; President FSE 88-99
Local President	Nicole Frascadore	Teacher 74, President AEW 84
Members	Four elementary teachers	Teacher of Preschool 89, Kindergarten 69, Grade Five 79, Computers 90
Administrative Staff	Michel Agnaïeff	Teacher, translator Egypt; Canada 66; CEQ 71-97; General Secretary CEQ 76-97
	Jocelyn Berthelot	Teacher 72-77, CEQ 77-->
	Micheline Jourdain	Teacher 68; CEQ Director of Professional and Social Political Action 84-->
PAPT & CTF	Harvey Weiner	Teacher 66; PAPT staff 71, president 75; CTF Assistant General Secretary 88-->
QPAT	Alan Lombard	Teacher 66; PAPT 77-98; QPAT, Executive Director 88-->
QPAT	Olivier Dolbec	Teacher 75-79; CEQ ; QPAT Executive Assistant (Negotiations) 80-->
Summary	26 Participants (5 State + 8 Other + 13 Organized teachers); 23 Interviews	

Abbreviation Title

AMDES	L'association montréalaise des directions d'établissements scolaires
CEQ	La Centrale de l'enseignement du Québec
CSE	Le Conseil supérieur de l'éducation
CTF	Canadian Teachers' Federation
CU	Conseil des universités
FCS	La fédération des commissions scolaires
FECS	La fédération des enseignants et des enseignantes des commissions scolaires
FDE	La fédération des directeurs d'écoles
FSE	La fédération des syndicats des enseignants
PAPT	Provincial Association of Protestant Teachers
QPAT	Quebec Provincial Anglophone Teachers
UdeM	Université de Montréal
UdeQ	Université de Québec

Saskatchewan, Canada

ORGANIZATION	PARTICIPANT	EXPERIENCE
Government:	Lorne Hepworth (C)	Veterinarian; Govt 82-91, Minister of Education 86-89; President Crop Protection Inc.
	Pat Atkinson+ (NDP)	Teacher (date?); Govt 86--> ; Minister of Education 93-98; Minister of Health 98-->
Department:	Craig Dotson PhD	Public service 75-->, Finance then Department of Education 96-->
	Margaret Lipp+ PhD	Teacher 66-85; Department (Special Education, Curriculum & Instruction) 85-->
	Michael Littlewood PhD	Public service for 25 years, Department of Education 88 -->
	Career Bureaucrat	Public service 30 yrs primarily human services, 2 yrs in Department K-12 Education
	Bureaucrat	Teacher 68; Department, Consultant, Department 93-->
LEADS	Pat Dickson	Teacher 60; Director of Education, LEADS Executive Director 97-->
Lawyer	Katherine Ford	Chairperson government-trustee provincial bargaining team 96-98
SSTA	Craig Melvin+	Teacher 70-74; Department 74-77; SSTA Research 77-89, Exec Director 89-->
Teacher educators	Murray Scharf+ PhD	Faculty 65->; U of Sask, College of Education, Dean 86-96; Director SELU 97-->
	Michael Tymchak+ PhD	Director NORTEP 77-92; U of Regina, Faculty of Education, Dean 92-->
STF Members	Galen van Cleave	Teacher, Principal urban secondary school, former President SSBA; 35 years
	Shirleen Vollet+	Teacher 76-01, President Regina Public School Teachers Association 97-00
	Four teacher members	Three city elementary school teachers and one rural secondary school teacher also president of a rural local teachers' association
	Two principal members	One rural elementary and one city elementary school
President	Doug Willard	Teacher 70-->, STF President 98-00, CTF President 01(-03)
Administrative Staff	Fred Herron+	Teacher 63-77; D of Ed 77-82; Department 81-82; STF 82-98, (GS) 87-98
	D. Crozier-Smith+ PhD	Teacher 67-73; Principal 74-83; STF 84-->, (GS) 98->
	Terence McKague+ PhD	Teacher 61; Faculty UofS 68; STF 71-94; professor and sessional lecturer U of R
	Harold Schultz+	Teacher 57; STF 78-92; NORTEP 92-98; McDowell Foundation 98->
	Tim Yee	Teacher 80-91; STF 91-95; Superintendent 95-96; SIAST Human Resources; STF 97->
CTF	Stirling McDowell+ PhD	Teacher 50-57; STF 57-82, STF (GS) 67-82; CTF Secretary General 83-94, Contract work and STS 95-->

+ Two interviews, 1997 and 1999

ORGANIZATION	INFORMAL EXCHANGES	EXPERIENCE
STF Archives	Sonia Sorestad	Records management and archives, STF; Assistance to identify artefacts
Provincial Auditor	Judy Ferguson	Exec Director Value-for-money audit of the prov education indicators program
Professor	Sam Robinson PhD	Research project regarding SK curriculum and instruction review process
Lawyer	Marjorie Benson PhD	Research regarding regulation reform in agriculture in Saskatchewan

Summary 27 Participants (7 State + 5 Other + 15 Organized teachers); 27 Interviews
4 Resource People

Abbreviation	Title
GS	General Secretary
Government	Government of Saskatchewan
Department	Department of Education
FSIN	Federation Saskatchewan Indian Nations
LEADS	League of Educational Administrators, Directors and Superintendents
NORTEP	Northern Teacher Education Program
SSBA	Saskatchewan School Based Administrators
SSTA	Saskatchewan School Trustees Association
STF	Saskatchewan Teachers' Federation
STS	Superannuated Teachers of Saskatchewan
U of Sask	University of Saskatchewan;
U of Regina	University of Regina;

Saskatchewan, Canada (Interviews 11/96-06/97)

ORGANIZATION		PARTICIPANT		EXPERIENCE IN EDUCATION IN SASKATCHEWAN
Government: Department:		Trustee-Minister Jack Lloyd*		Trustee 75-81, SSTA President 79-81; Govt 82-91, Minister of Education 82-84 Teacher 49-73; Department (Regions, Finance)73-87; (North)88-91; (C.S.)93-96
Govt/Dept		Margaret Lipp C1	PhD	Teacher 66-85; Department (Special Education, Curriculum & Instruction) 85-->
LEADS:	President	Ralph Eliasson		Teacher 71-85; Director of Education (D of Ed) 87-> ; LEADS President 95-97
	Executive Director	John Chyzowski*		Teacher 50-64; STF Admin Staff 65-84; LEADS Executive Director 85-95
	Director of Education	Brian Ward*		Teacher 48-76; D of Ed 76-86; Department 86-89; Interim D of Ed 89
SASBO:	President	Ron Walter		Secretary-Treasurer 74-->; President 96-97
SASC:	President	Deborah Agema		Home and School Association parent participant 89-->; President 96-98
	Executive Director	Joy Bastness		Home and School Association parent participant 65-->; President; Director 90->
SSTA	Presidents	John Egnatoff*	PhD	Teacher 48- , STF President 57-58; Trustee 64-76, SSTA President 74-75
		Trustee		Secretary/Treasurer 59-79?; Trustee 79-89; SSTA President 85-87
		Al Klassen		Trustee 86-->; SSTA President 95-97
	Executive Directors	Jake Volk		Teacher 61-65; Department 65-79; SSTA Executive Director 79- 89
		Craig Melvin		Teacher 70-74; Department 74-77; SSTA Research 77-89, Executive Director 89-->
Teacher Education		Murray Scharf	PhD	U of S, College of Education, Faculty 65-->, Dean 86-96
		Michael Tymchak	PhD	Director NORTEP 77-92; U of R, Faculty of Education 92-->, Dean 92--00
		Al Ducharme		Teacher 76-94; Director NORTEP 94-96; Exec Dir Prince Albert Grand Council, 96-->

* Honourary Life Member of the STF

ORGANIZATION		PARTICIPANT	EXPERIENCE IN EDUCATION IN SASKATCHEWAN
STF	Member	Bonnie Currie	Teacher 62-65, 82-00
		Demi Dunlap*	Teacher 49-90; Secondment to U of S 76-77; School Administrator 70-90
		Ron Hnatiuk	Teacher 68-99; School Administrator 89-99
		Verda Petry*	Teacher 49-61, 71-91; Trustee 91-00
		Marvin Schultz	Teacher 66-96; Ministerial Aide 97-->
		Shirleen Vollet	Teacher 76-01
	President	Carol Moen	Teacher 79—01, STF President 96-98; STF 01-->
* * *	* * *	* * *	
Administrative Staff	Rita Bouvier	Teacher 68-80; SUNTEP 80-85; STF 85-->	
	Heather-jane Robertson*	Teacher 70-76; STF 76-86; CTF 86-01	
	Boyd Taylor *	Teacher 53-82; STF 82-88	
General Secretary	Stirling McDowell* PhD	Teacher 59-61; STF 62-82; CTF 83-94; Contract work and STS 95-->	
	Mel Lofstrom*	Teacher 55-67; STF 67-87; D of Ed 88-93	
Non-Teacher Staff	Fred Herron*+	Teacher 63-77; D of Ed 77-82; Department 81-82; STF 82-98	
	Harry Dahlem*	Lawyer (Contracted Service) 62-96	
	Audrey Gilroy	STF Teacher Welfare Support Staff 66-93	
	Verna Gallen	STF SRC, PD Research Analyst 76-89, Admin Assistant 89-->	

* Honourary Life Member of the STF

Executive Assistants Interviewed 05-06/97: (Derwyn Crozier-Smith PhD, Terence McKague PhD, Harold Schultz as noted)
Susan Bates Teacher 68-88; STF President 88-90; SELU 91-92; Executive Council to Premier's Office 92-94; STF 94-01
Gary Ferguson Teacher 74-84; Consultant 84-87; SPDU Director 87-94; STF 94-->
Marie LeBlanc-Warick Teacher 74-94; STF 94-->
Lyle Vinish Teacher 75-84; STF 85-->

Summary
SK Totals

41 Interviews (4 State + 14 Other + 23 Organized teachers); 41 Interviews
57 Interviewees (9 State + 32 Organized teachers + 16 Other), 68 Interviews; 11 duplicate participants 1997 and 1999

Abbreviation	Title
North	A project working with northern communities on behalf of the Minister of Education Acting Director of Education for the Northern Lights School Division
C.S.	Correspondence School (Principal)
Exec. Dir.	Executive Director
Government	Government of Saskatchewan
Department	Department of Education
LEADS	League of Educational Administrators, Directors and Superintendents
SASBO	Saskatchewan Association of School Board Officials
SASC	Saskatchewan Association of School Councils
SSTA	Saskatchewan School Trustees Association
STF	Saskatchewan Teachers' Federation
STS	Superannuated Teachers of Saskatchewan
Teacher Education	College of Education, University of Saskatchewan (U of S); Faculty of Education, University of Regina (U of R); Northern Teacher Education Program (NORTEP)

APPENDIX C -- DATA ANALYSIS FORMAT

Site	Victoria, Quebec, or Saskatchewan
Source	Government, teacher organization, or neither
Self-identified	Position or function, may include name and training
Experience	Year of entry and work experience in public education system
<i>(Page break to protect confidentiality)</i>	
Relations between governments and teacher unions: The impact on education reform	
Element	Discourse
Relations:	
Framework or Foundation	
Climate	
Character	
Orientation	
Political parties	
Change:	
Forces	
Context	
Change Process:	
Education goals	
Curriculum	
Government strategy	
Union strategy	

Governance:	
Restructuring	
Decentralization	
Funding	
Professionalism:	
Curriculum	
Instruction	
Certification	
Professional development	
Accountability:	
Student evaluation	
Teacher appraisal	
School report	
System assessment	
Unionism:	
Membership	
Union mandate	
Union structure and operation	
Influence:	
Reforms	
Reform process	
Strategies	

APPENDIX D -- FEEDBACK

_____, 2001

Dear _____,

Attached is a draft of the case description regarding relations between organized teachers and the state in _____. Please treat this material in confidence.

The draft is a construction guided by the vision that “history is far less about truth than it is about identifying shapes and patterns” (Saul*, 1997, p. 391). The case description is story telling in a way that is both close to you, the participants, and your practical knowledge, and linked to the theoretical knowledge, the categories and associations proposed in the form of a preliminary typology of organized teachers and state relations.

I am requesting the assistance of at least three individuals from each case to reflect and comment upon my writing. Selected individuals are representative of government, the teacher union, and neither (that is an individual not affiliated with government or the teacher union). I am also requesting feedback from both an anglophone and a francophone in Quebec. This is done to correct any cross-cultural or experiential distortions and to enhance the validity of my research.

Please acknowledge receipt to me at humphris@stf.sk.ca and indicate your willingness or inability at this time to assist as requested.

Please review and comment to me on the draft.

1. Identify and correct any errors or gross omissions of relevant fact.
2. Reflect and comment on the reasonableness (and usefulness) of this draft as a description of the _____ experience.
3. Please return your comments to me electronically by _____, 2001.

Please write on the text itself in bold or create a cover letter or both or other means, as you prefer, to communicate your comments.

Thank you for your consideration.

Sincerely yours,

Shirley M. Humphries
 Doctoral candidate, Université de Montréal

Encl.

* Saul, J. R. (1997). Reflections of a Siamese twin: Canada at the end of the twentieth century. Toronto: Penguin Books.

APPENDIX E -- SCHOOL GOVERNANCE STRUCTURES

Victoria, AU Education System	Québec Education System	Saskatchewan Education System
Governing	Governing	Governing
Advisory	Advisory	Advisory
<p>Minister of Education</p> <p>Department of Education Regional Superintendents</p> <p>Schools School Councils (Two teachers (not union representatives), parents, principal)</p>	<p>Ministre de l'Éducation</p> <p style="text-align: right;"><i>Conseil supérieur de l'éducation</i></p> <p>Ministère de l'Éducation Directions régionales du MEQ Conseil scolaire de l'île de Montréal</p> <p>School Boards Executive Committee</p> <p style="text-align: right;"><i>Parents' Committee</i> <i>Other Advisory Committees</i></p> <p>Schools Conseil d'établissement (A governing board composed of equal numbers of voting parents and school personnel, plus the principal, 2 senior students, and 2 community non-voting members)</p>	<p>Minister of Education</p> <p style="text-align: right;">Education Council</p> <p>Department of Education Regional Directors of Education</p> <p>School Divisions Boards of Education</p> <p>Schools School District Boards of Trustees (Elected from community, school personnel eligible) (Rural), or Local School Advisory Committee (Urban)</p>

APPENDIX F -- AMENDMENT TO FIGURE 3

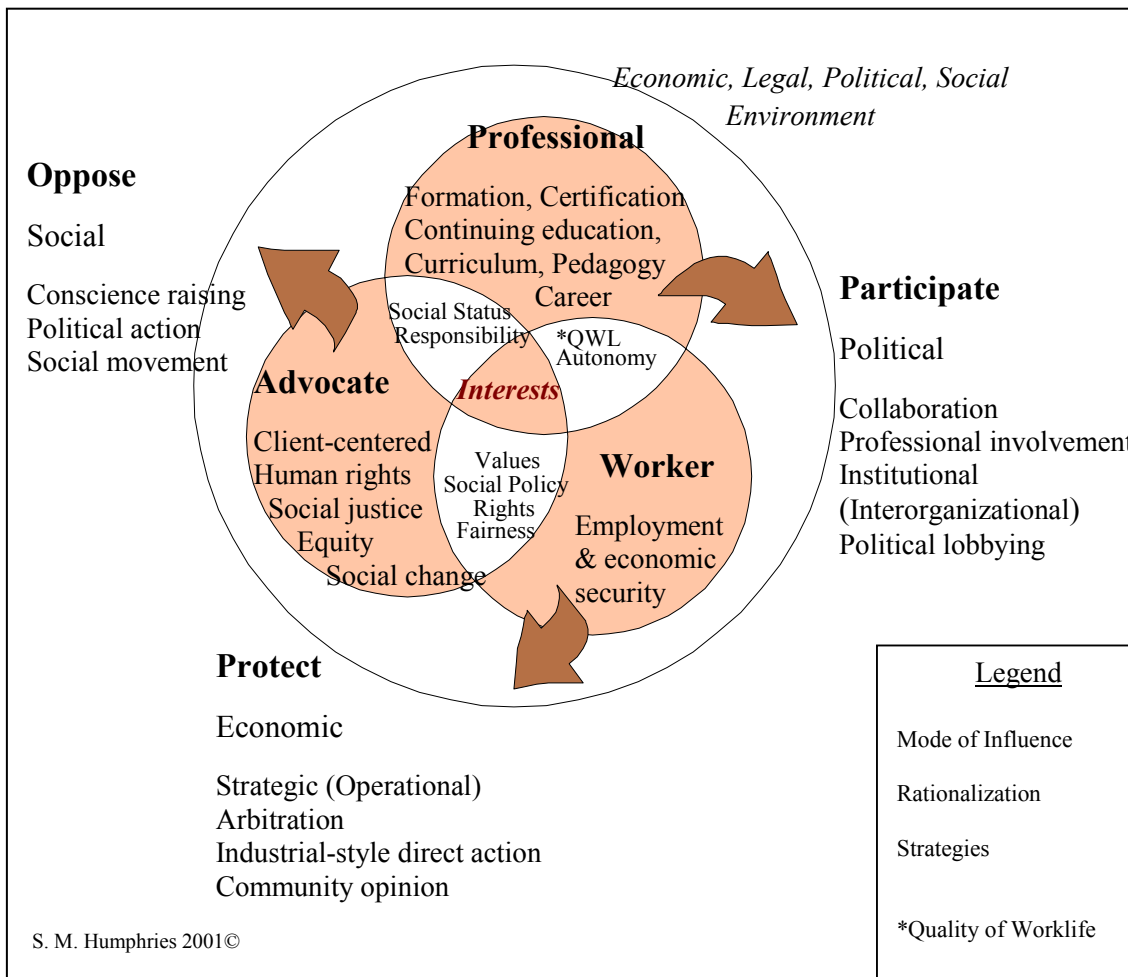


Figure F1: Amended Teachers’ Interests and Teacher Unions’ Actions

APPENDIX G -- CASE COMPARISONS

Table GI: State Features

Factor \ Case	State					
	Victoria		Québec		Saskatchewan	
Culture	Anglophone		Francophone		Anglophone	
<i>Ideology</i>	<i>Privatization</i>		<i>Centralization</i>		<i>Cooperation</i>	
Timeframe	1982-92	1992-99	1976-85	1994-99→	1982-91	1991*→
Climate	Excessive union influence	Conflict	Optimism then confrontation	Constructive opposition	Collaborative provincially (Diverse locally: Both conflict, collaboration)	
Political Parties	Labor	Coalition (Liberal and National Party)	Parti québécois (1983-94 Parti libéral focus to restructure boards of education)	Parti québécois	Conservatives	New Democratic Party *Coalition with Liberals '99
Political Context	Polarized		Centralist		Centralist	
Government Practice	Reliance on teacher unions	Shut out. Teacher unions perceived irrelevant	Negotiated contract, imposed rollback	Consult	Collaborate. Seek consensus for education policy. Jointly develop curriculum.	

Shirley M. Humphries (2001) ©

Table GII: Legal Framework and Informal Structures

Legal Framework and Informal Structures					
Factor \ Case	Victoria		Québec		Saskatchewan
Timeframe	→ 1994	1995 →	→ 1973	1974 →	1933 →
Organized Teachers' Authority	State – registered trade unions	1995 <i>National Trade Union Act</i>	1946 Legislation re: the profession	1974 Québec Labour Code	1935 <i>Act Respecting the Teaching Profession</i>
Organizational Status	A certified trade union		Professional organization	A certified trade union	Professional organization
Organized Teachers' Mandate	Primarily economic		Primarily professional & economic	Primarily social and economic	Primarily professional and economic
Organized Teachers' Representation	82→92 Govt recognized 3 unions	Industrial issues only as legislated federally	CEQ, FSE, and local associations speak independently to government and publicly		Recognized in legislation and in practice as official teacher voice to government
Organized Teachers' Role in Education Policy	82→92 Involved	No role (Marginal)	State consultation. CEQ use of public opinion to influence the state. (Hierarchical)		By consensus among education partners (Integral)
Teacher Salaries and Benefits	→ 82 imposed;	92→ ministerial order or offer.	1967 → (Two levels, three bargaining tables) a) Negotiation of salaries, pensions, & benefits <i>provincially</i> between Government and CEQ. b) Negotiation of work conditions between government-trustee & teachers (FSE) <i>provincially</i> . c) <i>Local</i> negotiations with school boards re work conditions, PD, representation		1973 → Bi-level collective bargaining: a) <i>provincially</i> government-trustee team with STF for salaries, pensions & benefits; b) <i>locally</i> boards with local teacher bargaining committees for work conditions, PD, representation
Professional Conduct and Competence	DOE function Ineffective school inspectors	Govt appointed committee	Employer imposed employment sanctions. No supervision of teachers		STF determined codes and process for competency, conduct and collective interests. Boards responsible for teacher supervision and evaluation

Table GIII: Teacher Unionism

Factor \ Case	Organized Teachers				
	Victoria		Québec		Saskatchewan
Timeframe	1886-1995	1995 →	1936-74	1974 →	1933 →
Organization	1886 State School Teachers' Union 1926 Victoria Teachers Union Split into: a) '46 / '49 Victoria Secondary School Teachers, b) 1967 Technical Teachers Union	Australian Education Union Victoria (AEUVic) (Branch of the national Australian Education Union)	'36 Rural women '39 Rural teachers '42 City teachers 1946 the three amalgamate into the Corporation of Catholic Teachers in 1967 to become the Québec Corporation of teachers	La Centrale de l'enseignement du Québec (CEQ); la FSE (Fédération des syndicats de l'enseignement, formerly the Québec Corporation of Teachers) is the founding and largest member union; 2000 renamed La centrale des syndicats du Québec (CSQ)	1914 SK Union of Teachers became in 1919 SK Alliance of Teachers. 1932 SK Rural Teachers 1933 amalgamation to form the Saskatchewan Teachers' Federation
President		Two year renewable		Three year renewable term	One year renewable term
Membership Source	Voluntary Teachers, principals, and education workers		Mandatory Teachers, professionals, education workers in Catholic education	Mandatory (with 50% uptake as per Rand Formula) Since 1998 educators in francophone public education and others noted in text	Mandatory (Legislated) Educators in public, Catholic, francophone, and historic independent education systems
Principals Membership Volume	Voluntary membership AEU Vic 7,000 Represented 55-60% of potential in 1998-1999		Mandatory	Not Eligible CEQ 125,000; FSE 75,000	Mandatory STF 12,000

Table GIV: Governance

Governance			
Factor \ Case	Victoria	Québec	Saskatchewan
Structure	<ul style="list-style-type: none"> *Government employer *School as employer in Schools of the Third Millennium 1999-2000 *<i>No intermediate governance</i> such as boards of education 	<ul style="list-style-type: none"> *Board of education employer *1997 confessional to linguistic based boards of education *Mandated reduction of numbers of school divisions (72, '98) 	<ul style="list-style-type: none"> *Board of education employer *1992 Creation of Conseils scolaire fransaskoise *1991 study shelved, 1995 → Voluntary amalgamations(100, '99)
Decentralization	<ul style="list-style-type: none"> *Closed 300 schools '93 1980s Public school councils with teacher union representation and private schools 1994 → Parents, teachers not representing the Union, and the principal form School Councils for : *Schools of the Future (site-base managed) *Schools of the Third Millennium 1999-2000 (self-governing) 	<ul style="list-style-type: none"> 1840s → Parish schools, private schools, and school boards of education 1997 → Creation of 3,000 school governing boards (Conseils) with equal voting parents and school personnel re: budget and program within provincial constraints and operating under the umbrella of boards of education 	<ul style="list-style-type: none"> → 1945 Approx. 5,000 individual school boards 1946 → Boards of education for school divisions with elected reps from school districts, teachers ineligible; Elected local <i>boards of trustees</i> for rural school <i>districts</i> and appointed urban local school advisory councils (No assurance of teacher voice.)
Funding	<ul style="list-style-type: none"> School Councils report to the state *93% State funding * 7% Local fund raising *80% of education budget school controlled *PTR 14.9, 1999 \$4,754C @.843C/\$1AU (\$5,640AU/pupil 1999) % state expenses *33.9% attend Catholic and independent schools funded primarily by Federal grants, also State funds *Federally funded targeted education projects 	<ul style="list-style-type: none"> Conseils report to communities *77% Provincial funding *Local property tax 15% limit, average 16% *school budget by school Conseil *PTR 14.9, 1998 \$5,573C/pupil 1998 24.4% GDP/capita 1998 7.6% prov expenses '95 *20.1% attend private schools funded 45% by provincial grants 	<ul style="list-style-type: none"> Boards report to rate payers *40% Provincial funding *Local property tax no limit *varies, school budget at board discretion *PTR 16.3, 1998 \$5,817C/pupil 1998 22.7% GDP/capita 1998 8.6% prov expenses '95 *2.0% attend home schooling and nonfunded independent schools. Grants are paid to historical independent high schools and independent schools associated with the public system

Table GV: Accountability

Accountability				
Factor \ Case	Victoria	Victoria	Québec	Saskatchewan
Timeframe	1973-1992	1992-1999	1994→	Mid 1960s→
Teacher Certification	Teachers' Registration Board with union, principal, & government reps	1992 Union involvement in certification abolished, Department of Education authenticates certificates. 1993 → Government-appointed standard setting body. Pre 1980s→ Discipline by DOE	Granted and revoked by Minister of Education	1964→ Granted and revoked by minister in consultation with the Board of Teacher Education and Certification, all partner education organizations represented including STF
Teacher Conduct			Discipline by board of education recommendation to the minister	Government granted STF responsibility for teacher conduct 1948, competency 1970, and collective interests 1997. The Federation may discipline members, or make recommendations to the minister re certification.
Teacher Appraisal	None	1995→ Pay for performance link in annual assessment by principal against imposed standards	None	Local supervision and evaluation policies often developed jointly with local teachers: Generally developmental supervision by principals. Evaluation by directors of education. 1991 → Assess achievement of curriculum goals
Case cont'd	Victoria	Victoria	Québec	Saskatchewan
Student Evaluation	mid 1980s→ Standardized school leaving finals, VCE. Results published by student and school with explanatory notes. 1994 → Learning Assessment Project grades 3, 5	1980s → Standardized school leaving finals. Results published by student and school with no contextual information. 1993→ National standardized testing (SAIP) ages 13, 16: math, reading & writing, science		1960s→ School leaving finals 100% by accredited teachers, or 40% standardized and 60% teacher by non-accredited teachers. 1993→ Provincial Learning Assessment Program for language arts and math, grades 5, 8, 11. 1996→ SAIP ages 13, 16: math, reading & writing, science

Table GVI: Educational Knowledge

Educational Knowledge					
Case	Victoria		Québec		Saskatchewan
Factor					
Timeframe	1992-00		1990s→		1980s→
Education	1992		1997		1984
Goals	Full student potential in preparation for economic competition		Student success, national identity, and economic competition		Full student potential, general liberal education
Curriculum	1993		1997		1986
Framework	10 key competencies common to 8 key subject areas (based on the national framework set in 1989)		4 compétences transversent la grille-matières de cinq (5) domaines 25% adaptive dimension to meet individual learning needs; teacher developed materials to be approved by the Committee of Program Studies		6 common essential learnings across 7 required areas of study 20% local options and adaptive dimension to meet individual learning needs
Timeframe	1982-1992	1992-1999	1976-1985	1994→	1980s→
Education Goal Setting	Govt imposed	Govt imposed	Government imposed	Public consultation under CEQ pressure: Les états généraux	Public consultation: <i>Directions</i> 1984 Reviewed 1992
Education Policy Setting	Consult	Impose	Consult	Consult	Consensus among partners in education
Curriculum Setting Process	School autonomy within centralized framework	1993 Centralized curriculum and standards framework (adaptation of 1989 federal curriculum framework)	Centralized; prescriptive	Centralized, consultation with employer-identified teachers	1944, 1964, 1984 Centralized, developed jointly with teachers and education partners 1996 evergreen curriculum: interactive web site with ongoing Department adjustments in response to teacher input