

# National Social Science Association Proceedings



## New Orleans Fall Conference



*New*

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# NATIONAL SOCIAL SCIENCE PROCEEDINGS

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**"Ready Or Not, Ours To Teach:  
Underprepared College Students**

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# "Ready Or Not, Ours To Teach: Underprepared College Students

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Presentation at the 2018 National Social Science Association Summer Seminar

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Lake Tahoe, Nevada

"With 42% of students entering college underprepared and an estimation that 80% of the future jobs will require the skills that a college education provides, we must find better methods to prepare these students and assist them in achieving their academic goals." (McCabe, 2003 in Student Support Services for the Underprepared Student, E. Wilmer, 2008)

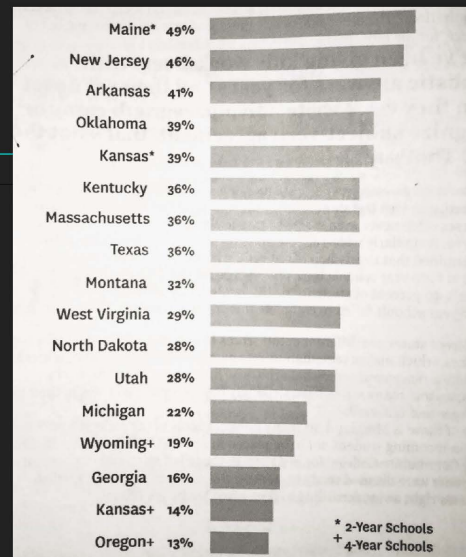




- Somewhere, somehow, the concept of following an outline to write a paper totally missed them. This is very difficult to teach to some students. ‘

- On more than 200 campuses nationwide, more than half of incoming students must take remedial courses.
- In one study discussed in 96% of 911 campuses reported having students who required remediation.

(Butrymowicz, 2017)



## Who are “underprepared” students?

For over 3 decades, these students have remain a diverse group :

“the academically underprepared student pool is large and diverse in terms of **age, socioeconomic condition, previous academic performance, standardized test scores and emotional health** and is enrolled in colleges and **universities of all types nationwide** (Moore & Carpenter, 1985)

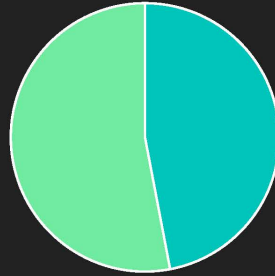
## Contributing factors

- **Prior educational experiences** (academic failure; poor preparation; low expectations)
- **Individual differences** (neurological, cognitive, health or psychological factors; attitude)
- **Family risk factors** (family values/expectations)
- **Social risk factors** (family/peer stress; conflicting cultural factors)
- Being a “**Millennial**” (“life attitude”)

(Keeling, 2003)

## Among all college students

Entry Level College Students



■ Prepared ■ Underprepared

○ 53% are UNDERPREPARED (AAC&U)

## So what's to be done?



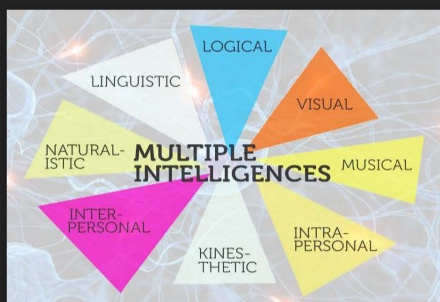
## This is the good news!



- Resilience is perhaps the “best barometer “ of SUCCESS!  
(McGillin, 2003)

- Fortunately, some of these students, particularly “first generation” students may have “resilience” when compared with some of their peers. (Tokarczyk & Fay, 1993)

## At the instructional level.....



- Keep students' individual learning styles in mind when preparing lectures and assignments
- Encourage students to keep in touch with their academic advisor and take advantage of the advising relationship
- Build **relationships** with students

## Some stuff, we as instructors have to take the lead on...

- Encouraging (or even “force feeding”)
  - Teaching study skills
  - Organizing study groups
  - Use of RUBRICS for assignments
- Modeling discussion
- Incorporating “first generation” experiences in lectures/class sharing
- Encouraging student2student support
- And again....developing “personal relationships”

**Additional tips  
for classroom support of  
underprepared students**



# Be Clear About Being Clear: Don't assume anything !

## Use

- Graphic descriptors
- Simple, non-convoluted sentences
- Define, define, define and ....define
- Study guides and assignments linked directly and immediately to assessments
- Break It Down to the "Least Common Denominator.....YOU MAY HAVE TO SUPPLY THE BACKGROUND KNOWLEDGE
- **Provide even the "smallest" detail**
- Do More Chunks in Smaller Bites

## Be FLEXIBLE

Assessments



Assignments



Time



## Relax: GROUPS are okay!

Assessments



Assignments



Time



## Here's looking at ME!



- Review your own tests and assessments
- Do constant self evaluation (incorporating feedback from students)
- Are you showing
  - Empathy
  - Caring
  - Enthusiasm in your teaching

## Campuses support the “resilience” of students through



- Student Academic Success Center
  - Educational Support Program
  - Pre-Major Program Advising
  - Learning Skills Support
  - Tutoring Centers/Programs
- Writing Center
- Math and Stats Labs
- Counseling and Career Development Center
- Financial Aid Office
- Library
- Office of Housing and Residence Life
- Student Services Center (O.A.S.I.S)



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Uradnik v. Inter Faculty Organization, et al: Can a Faculty  
Member Refuse Union Representation?

Sue Burum,  
Minnesota State University, Mankato



At the core, labor unions are working men and woman, unified as one force. Despite any personal differences that may exist between us, we have banded together to protect and improve the lives of workers. We rise up together for the greater good. We defend one another like family. (Carney, 2014).

Union solidarity appears to be cracking along partisan lines. Some people represented by unions are no longer happy with their union representation. In June 2018, the U.S. Supreme Court (Court) came to a decision in *Janus v. AFSCME*. The Court decided that public employees do not have to pay agency fees (fair-share dues) to unions to cover the cost of collective bargaining (*Janus v. AFSCME*, 2018). The Court had five justices in the majority and four in dissent. These justices also split along partisan lines. In 2018, a Saint Cloud, Minnesota professor filed a federal lawsuit alleging that her Freedom of Speech rights were being violated because she is being represented by a union with whom she disagrees. This paper will analyze *Abood v. Detroit Board of Education* (1977) and *Janus* to compare the possible issues and potential outcomes in the new case, *Uradnik v. Minnesota*, and offer suggestions for public sector unions to survive in the future (*Uradnik v. Minnesota*, 2018).

#### ***Abood v. Detroit Board of Education***

A Michigan statute, authorizing exclusive union representation of local government employees, permitted an agency fee agreement in which the union would represent all government employees under the condition that all employees must either join the union or pay an agency fee to cover bargaining expenses. The appellant teachers did not approve of this agreement. They objected to paying union dues because they oppose collective bargaining in the public sector. They also objected to certain union political and ideological activities that were beyond the scope of collective bargaining activities. These activities included endorsing certain political candidates, which they believe violates their First and Fourteenth Amendment Freedom of Association.

In *Abood*, Justice Potter Stewart wrote the majority opinion. He was joined by Justices William J. Brennan Jr., Byron White, Thurgood Marshall, William Rehnquist, and John Paul Stevens and three justices wrote concurring opinions. The Court concluded that the agency fees used in the private sector were also constitutional in the public sector. Those who did not choose to belong to the union could be required to pay agency fees to cover the cost of collective bargaining, but they did not have to pay for political or ideological activities that went beyond contract negotiation and administration. In arriving at this decision, the majority used private sector precedents in *Railway Employees' Dept. v. Hanson* (1956) and *International Assn's of Machinists v. Street* (1961). In *Hanson*, the Court held that requiring financial support for a collective bargaining agency by those who received the agency's benefits did not violate the First Amendment. The Taft-Hartley Act of 1947, which applied to the private sector, also allowed state law to provide for union security agreements (Taft-Hartley, 1947). Preventing free-riding was a valid rationale for the inclusion of agency fee clauses in collective bargaining agreements. In *Street*, the Court ruled that unions could not use agency fees for political purposes opposed by nonunion members. In *Abood*, the majority concluded:

A public employee who believes that a union representing him is urging a course that is unwise as a matter of public policy is not barred from expressing his viewpoint, but, besides voting in accordance with his convictions, every public employee is largely free to express his views, in public or private, orally or in writing, and, with some exceptions not pertinent here, is free to participate in the full range of political and ideological activities open to other citizens (*Abood v. Detroit Board of Education*, 1977).

The use of the Taft-Hartley Act and these two private sector cases allowed the Court to conclude that the Constitution permitted compelled contributions from public sector employees, but only for the costs of performing the union's statutory duty to be the exclusive bargaining agent for all employees, regardless of union membership.

Since 2006, when Justice Samuel Alito joined the Court, anti-union groups tried to challenge *Abood*. The focus of attacks has concentrated on the difficulty of separating political activities from contract negotiation activities. For example, it is hard to argue that a union that campaigned for certain political candidates, who support workers and negotiated contracts, does not also help union contracts get adopted by the legislature. It is hard to know what activities are beyond negotiating and getting contracts ratified. Agency fees to nonunion members have become 75% of union dues or greater (Lehman & LaPlante, 2018). In 2016, the Court had been prepared to overrule *Abood* in *Friedrichs v. California Teachers Assn's* (2016), however, the sudden death of Justice Antonin Scalia caused the Court to deadlock 4-4. This left the *Abood* decision the law of the land.

### ***Janus v. AFSCME***

In November 2014, Bruce Rauner was elected the governor of Illinois. He ran on an anti-union platform. He took office in January 2015 and issued an executive order that suspended the collection of agency fees from non-union members. The American Federation of State, County, and Municipal Employees (AFSCME) represented all Illinois public sector employees. They were selected to be the sole union to represent all workers equally. As a result, union members pay full union dues. In contrast, non-union members, who did not want to belong to the union and pay full union dues, were charged agency fees to cover the cost of union negotiation of their employment contracts. This is an agency shop agreement. Rauner also filed a lawsuit in the United States District Court for the Northern District of Illinois against AFSCME challenging the agency shop agreements and fees as being an unconstitutional violation of the First Amendment.

The union sought to dismiss the case and claimed that Rauner did not have standing to bring the lawsuit. In May 2015, the District Court found that Rauner did not have standing because he had "no personal interest at stake." Three employees, including Mark Janus, an Illinois child support specialist, tried to join the governor's suit as co-plaintiffs. The judge denied this request, but allowed the three employees to continue the case as the sole plaintiffs. In July 2015, the Court issued a writ of certiorari in *Friedrichs*, meaning the Supreme Court would be hearing the case. *Janus* was put on hold pending the outcome of *Friedrichs*. With no decision from *Friedrichs* after the Court split 4-4, the *Janus* case was restarted. The issue in the case was whether agency fees, required by the agency shop agreement, violated workers' First Amendment right of Freedom of Association and Freedom of Speech. Workers were forced to associate with

the union as it was the only organization who could negotiate contracts with the state. Workers believed that their speech rights were violated because they had to pay fees used by the union to advocate positions they disagreed with. The union sought to dismiss the case by arguing that *Abood* was settled law and barred the *Janus* case as the *Abood* case decided agency shop agreements did not violate the Constitution. The District Court dismissed the case. The case was appealed to the Seventh Circuit. In May 2017, the appellate court affirmed the District Court's decision and dismissed the case on the basis of *Abood*.

### **Majority Opinion**

Janus petitioned the Supreme Court for a writ of certiorari and the petition was granted in September 2017. In June 2018, the *Janus* case overruled *Abood* with the help of newly confirmed Justice Neil Gorsuch, who filled Scalia's seat on the Court. Writing for the Court, Justice Samuel Alito, joined by Chief Justice John Roberts and Justices Anthony Kennedy, Clarence Thomas, and Neil Gorsuch, wrote that *Abood* was "inconsistent with standard First Amendment principles," because fair-share fees for collective bargaining activity effectively compelled nonunion employees to subsidize union speech on matters of "great public importance" (*Janus v. AFSCME*, 2018). He also wrote that *Abood* was "poorly reasoned," "unworkable," and inconsistent with other First Amendment cases (*Janus v. AFSCME*, 2018; Matthews, 2018).

Alito recognized the importance of stare decisis, which means courts should use prior decisions to decide current cases, even if a justice believed a prior case was wrongly decided. The justices should accept the case as precedent. Alito, however, had argued for six years that *Abood* was so poorly reasoned that it needed to be overturned. *Abood* was inconsistent with other First Amendment cases and the use of the case as precedent led to practical problems and abuse. Also, the cases relied upon in *Abood* are for private sector employees not public sector employees. A different First Amendment question arises when the government, versus a private employer, forces an employee to pay agency fees.

Alito also clarified that the approach the Court must use to resolve the dispute in this case is strict scrutiny. When a government interferes with a fundamental right, like Freedom of Speech or Association, the Court subjects the government's law to the most ridged scrutiny. Under strict scrutiny, the government bears the burden of proof in the courtroom, not the one challenging the law. The government must establish a compelling need for its law in order for the Court to uphold a law that interferes with a fundamental right. The law also has to be written in the least restrictive fashion to achieve the government's compelling need for the law. Alito criticized the dissent in the case for using rational basis to reach their conclusions. If rational basis is used, the burden of proof in the courtroom is on the challenger, not the one that made the law. The law simply needs to be rationally related to a legitimate government interest for the state to win. Rational basis is usually not used to protect rights. Only the most egregious enactments are overturned under this approach. Greater leeway is given to the government. Alito writes that strict scrutiny must be used in this case because the law interferes with a fundamental right. This is in part what concerned him when he wrote that *Abood* was not well reasoned. *Abood* did not clearly indicate that strict scrutiny was being used. Alito finds that the government's compelling need for an agency shop agreements was to have one union solely represent the workers in contract

negotiations. This was needed to encourage “labor peace.” In *Abood*, labor peace meant avoiding the conflict and disruption that would occur if employees were represented by more than one union. The Court in *Abood* predicted multiple unions would create inter-union rivalries and dissention among the workforce. The employer could face “conflicting demands from different unions” (*Abood v. Detroit Board of Education*, 1977). The employer would face confusion in attempting to enforce more than one labor agreement. This argument demonstrates an inconvenience to the government if an agency shop is not used to work with employees, but it does not establish a compelling need for agency fees. The Court in *Janus* left the argument of whether an employee can be forced to accept a union as the employees bargaining unit for another day and case. The focus in *Janus* was whether agency fees can be imposed on those public employees represented by the union, but do not pay union dues.

In *Abood*, the Court required the agency fee to be narrow. Agency fees were needed to support the work of that union in negotiations. It was important to avoid free-loading, meaning having non-union members get the benefit of the union’s contract negotiations without helping the union members pay for that activity. Since it was important to have one union represent the entire workforce, all employees should have to pay, regardless of union membership, to achieve labor peace. There would be too much worker conflict if non-union workers did not have to pay for contract negotiations when union members had to pay for everything. In *Abood*, the potential strife between union and non-union members over negotiation fees was compelling enough to support agency shop agreements and agency fees. However, in *Abood*, the Court decided the agency fee could only cover contract bargaining fees. This became the fair-share/agency fee cost non-union members had to pay for to keep the representation costs evenly distributed among benefited workers. The fees could not cover all union activities, especially those activities that advocated a political agenda, such as work done for a particular political party, a particular party candidate, or to advocate positions on non-contract issues. This would be overly broad and interfere too much with First Amendment freedoms like speech and association.

Alito did not agree with the Court in *Abood* that potential free loading posed such a compelling problem that agency fees should be allowed. He used several examples to support this assertion. First, in the federal system, one union is elected by the members to negotiate contracts, but federal law does not permit agency fees. Nevertheless, out of nearly a million federal employees, about 27% of the federal workforce, are union members (*Abood v. Detroit Board of Education*, 1977). The same is true for the Postal Service. Second, 28 states are right to work states, meaning that a union is selected by the workers to represent them in contract negotiations, but agency fees are prohibited. Again, the worker strife predicted in *Abood* 40 years ago has not materialized. Therefore, labor peace can be achieved with fewer restrictions on First Amendment rights.

Union speech in the context of collective bargaining is not apolitical (McArdle, 2018). Alito argues that everything public sector unions do in collective bargaining is political and the speech has major political ramifications, especially as it affects pensions and public sector spending. He points to Illinois, which, as of 2013, had nearly \$160 billion in unfunded pension and retiree healthcare liabilities. By 2017, those unfunded costs had grown, and the state had \$15 billion in unpaid bills. Illinois’ credit

rating had fallen to “one step above junk” (*Janus v. AFSCME*, 2018). This was the lowest rating ever recorded for a U.S. state. The governor argued that employment-related debt is consuming the ability to spend on all the rest of government’s functions such as education, public safety, human services, and the state’s ability to pay its current bills. The government wanted to address the problem in part through collective bargaining in areas like health insurance benefits, overtime, promotions, and other employment expenses. The union countered with suggestions like “increasing taxes in accordance with one’s ability to pay,” “cutting spending to Wall Street financial institutions,” “closing corporate loopholes,” “expanding the base of the sales tax,” and increasing wages (McArdle, 2018). Public sector employees disagree over these issues and are not solely represented by one political party. Forcing workers to support policies through contract negotiations that they do not believe in is compelling them to speak with their money for solutions they disagree with.

Since agency shop arrangements do not satisfy strict scrutiny and *Abood* did not clearly apply strict scrutiny analysis, Alito thought there were strong reasons that *Abood* should be overruled despite being the law of the land for over 40 years. The state may find it very convenient to have no more than one union to bargain with, but does convenience rise to the level of a compelling need? The practice of requiring all workers to support and be represented by one union was left for the upcoming *Urdu* case. A union and the state may find it necessary to have employees pay for that negotiation, since free-riding by non-paying union members is certainly not fair. However, Alito concluded that these concerns do not create a compelling need for the state to coerce employee speech by requiring them to pay union dues as a condition for their employment. Requiring non-union employees to pay agency fees was coerced speech, and coerced speech has traditionally been considered a major First Amendment violation. This caused *Abood* to be overruled despite the strong presumption that a court should not ignore *stare decisis* and overturn prior cases.

Finally, and unexpectedly, Alito required that, for the first time, workers in the public sector had to opt-in to unions and union dues. No longer can it be assumed that everyone is in the union and willing to pay dues, even agency fees. This procedure, he concluded, violates the First Amendment. Only by expressly agreeing to pay agency fees can it be said a worker has waived their First Amendment rights. A waiver cannot be presumed. This could substantially reduce union membership (Matthews, 2018).

### **Dissenting Opinion**

Justice Elena Kagan, joined by Justices Ruth Bader Ginsburg, Stephen Breyer, and Sonia Sotomayor, wrote a defense of *Abood* in a dissenting opinion to Alito’s majority opinion in *Janus*. She was concerned that the Court is not giving proper deference to *stare decisis*. She sees the majority as tossing out precedent simply because they no longer like the case or find the case inconvenient. To her, this was the Court’s attempt to usurp powers from legislatures and to make policies that are better left to elected branches of government. *Abood* struck a balance between employees’ First Amendment rights and government employers’ interests in running the workforce as they sought proper. Employees, not members of the union, had to pay agency fees to the union so they carried their own weight in negotiations. However, the union could not use any part of those agency fees for the union’s political or ideological activities.



After 40 years, Kagan concluded that *Abood* is embedded in employment law. It has been cited in many other cases and the case is central to collective fair share bargaining fees, which government can charge to all workers, when full union fees cannot be charged to all. The government and the people have relied on this precedent. Instead of discussing strict scrutiny or even rational basis, she focuses on the fact that government entities have “substantial latitude” to regulate their employees’ speech, especially about terms of employment, so that they can operate their workplaces effectively. Overruling *Abood* will “require an extensive legislative response” and “dislodge settled rights and expectations” (*Janus v. AFSCME*, 2018). Twenty-two states have enacted statutes authorizing fair-share provisions. Agency shop agreements enabled the government to advance important managerial interests by ensuring exclusive employee representatives to bargain with. Agency shop agreements are a *paradigmatic necessity*. Overruling *Abood* will have great consequences. Unions will lose a secure source of financial support. Each state will now have to come up with new solutions and enact new laws to find a way to manage their workforce. The relationship between government workers and employees will alter in predictable and unexpected ways. Kagan was disappointed with the majority when they responded to this concern by stating, in a footnote, that the implementation of their case is of no concern to the Court (*Janus v. AFSCME*, 2018). The paradigmatic concerns and the fact that *Abood* resolved these concerns for over 40 years was most persuasive to Kagan. Agency shop agreements need agency fees so the union has the funds to be the sole representative of all the employees. The government needs the union to gain the benefits from exclusive representation. This relationship helps facilitate stable labor relations. It is too hard to negotiate and implement different contracts with different terms as well as attempting to settle grievances from multiple contracts. There was a strong practical reason to keep the case through *stare decisis*, especially since there may be no better way to manage public sector relationships. It is self-evident to Kagan that these are compelling concerns. She is not analyzing the state’s concern through rational basis.

Kagan concluded that the decision weaponized the First Amendment and will allow judges in the future to intervene in economic and regulatory policy. The Court overruled *Abood* for no exceptional or special reason. The Court simply wanted to pick winners and losers in this policy debate. This reader believes she might be arguing that the majority is actually using a preferred freedoms approach to Freedoms of Speech and Association. When the preferred freedom approach is used, rights are placed on a pedestal and no state interests are allowed to interfere with those rights, even if interests are compelling. The majority uses the words “compelling need,” but actually may not be open to any government infringement of these rights, no matter what need is articulated by the state. Worse, the use of the preferred freedoms approach may not be uniformly applied to all rights. Only rights particular justices want to protect are put on a pedestal and given the preferred freedom approach. Other rights are given the direct scrutiny approach. The Court might actually be using the stricter standard (preferred freedoms) when the Court simply dislikes the state’s law. This is picking winners and losers in disputes by “weaponizing” speech and press rights. Some states and local governments think that unions promote healthy labor relations. Other states think strong unions increase costs and impair the delivery of other government services. Twenty-two states wanted strong unions and fair-share fees and twenty-eight did not.

The country was closely divided. Kagan argues that the states should be free to decide for themselves what they wanted for their workers. In this case, the Court has forced all states to adopt one model when it was not constitutionally required. Almost all economic and regulatory policy affects speech. Now judges can intervene to make policy when that is more appropriately left to legislative bodies.

***Uradnik v. Inter Faculty Association, et al***

Political Science Professor Kathleen Uradnik is suing St. Cloud State, the Inter Faculty Organization (IFO), and the Minnesota State Colleges and Universities System's Board of Trustees (Uradnik, 2018). The IFO represents faculty in negotiations with the State of Minnesota. It has been designated as the exclusive representative to negotiate with the state for faculty contracts. Uradnik has no choice but to use the union to negotiate her contract. Until the *Janus* decision, she paid fair-share union dues. After *Janus*, she is not a paying union member. She is represented by Robert Alt, The Buckeye Institute's president and chief executive officer. The Institute is a non-partisan research and education organization, a think tank, that advocates in favor of the free market. The Institute was the first organization in the country to file lawsuits after *Janus*, asking courts to end compelled exclusive representation. The organization represents Professor Uradnik in Minnesota, Jade Thompson in Ohio, and Professor Jonathan Reisman in Maine. She argues that she did not ask for nor wants union representation. This violates her free speech rights because she has no choice but to support the union's actions, even if she disagrees with them (Marohn, 2018). Her lawsuit alleges that this forced representation deprives her of the right to petition the government on her own behalf. Uradnik also claims that the union undermined her ability to advance her career and routinely interfered with her professional opportunities and relationships. She claims that the IFO discriminates against non-union faculty members by "barring them from serving on any faculty search, service, or governance committees, and even bars them from joining the Faculty Senate" (Buckeye Institute, 2018). The IFO has the exclusive right to appoint faculty members to "system-level" committees, which "oversee tenure, workload expectations for faculty, establishes endowed chairs, awards funds for professional development, establishes departments and department chairs, and more" (Gottschling, 2018). She claims that this treatment "impaired her ability to obtain tenure, to advance her career, and to participate in the academic life and governance of her institution." This makes non-union faculty members second class faculty members and gives special preferences to union members (Gottschling, 2018). Alt said that the *Janus* decision "strongly hinted that exclusive representation, from a First Amendment standpoint, rests on very shaky ground" (Associated Press, 2018). Alt further said that the Court stated, "In no other context would we permit an individual to be forced to speak or associate with someone with whom they disagreed" (Marohn, 2018).

Brent Jeffers, the president of the IFO, said that the lawsuit "is part of a nationally coordinated strategy by powerful forces aimed to destroy collective bargaining" (Associated Press, 2018). He went on to say, "It is a direct attack on our shared values and collective voice. United, we are powerful advocates – and our solidarity threatens the national anti-labor organizations behind these attacks. Our members know that a strong faculty union is vital to the success of our students and communities. In the face of these attacks, we stand united and will continue our mission of providing an extraordinary education that is accessible and affordable for all" (Marohn, 2018). Adam

Hammer, a spokesman for St. Cloud, said that whatever happens in the case,” [It] will have no impact on the constructive relationship we have with our faculty and staff, the labor unions that represent them, or our shared commitment to the success of our students” (Gottschling, 2018).

Uradnik’s case was filed on July 6, 2018, in the United States District Court for the District of Minnesota. A preliminary injunction motion was filed on July 31. She requested a temporary order to block the union from acting as a non-member’s sole bargaining agent. On September 27, 2018, Minnesota Federal District Court Judge Paul A. Magnuson denied the motion for a preliminary injunction in the case. The Buckeye Institute filed its notice of appeal with the U.S. Court of Appeals for the Eighth Circuit (Uradnik, 2018). A ruling in her favor could put her and her university in uncharted territory. She may be left on her own to negotiate wages and benefits and her university may be free from its obligation to bargain with the IFO (lafolla, 2018).

### **Possible Resolution of Uradnik**

Professor Uradnik will probably have standing to bring her lawsuit. While she is not now being forced to pay fair-share fees, she claims that she is barred from joint committees. Those committees are reserved for union members and consist of faculty and the school’s administration. She claims this hurts a non-union faculty member’s chances for promotion. This is possible, although ad hoc joint committees are open to all faculty regardless of union membership because they are created to handle one-time issues. These committees contain administration as well as faculty. Certainly, a faculty member that is known by the school’s administration and a faculty member whose work on committees was observed first hand by administrators would have an edge for promotion as the faculty member’s promotion file moves through the administration.

Faculty members must compete for special grants and monetary rewards distributed by various committees. This money can be used to lessen a faculty member’s work load. Fewer teaching duties can create options for more research, which is crucial for promotion. This is additional income. Under Minnesota’s employment contract, a faculty member is given money equivalent to one conference each year in professional development funds. If a faculty member never wins such monetary rewards, they still can attend one conference.

Uradnik is not barred from all committees. Department committees, unlike ad hoc joint committees, are long-term committees. They are open to all department faculty regardless of union membership. Examples of the type of committees at the department level are hiring committees, personnel committees, curriculum committees and others. It is also not a requirement to be a union member to be a department chair. She mentions not being able to be on a faculty senate, but not all Minnesota schools, like Minnesota State University, Mankato, have a faculty senate. This writer, while also in the Minnesota system, has not had any experiences with faculty senate and cannot comment on its membership.

If her sole argument for standing to bring a lawsuit was simply that she is represented by a union she does not agree with, she might not have standing. In agency shop agreements, the workers are supposed to vote for the union that will represent them. If this were the case and the union won the election to be the sole union representing the workers, then she would not have standing. She would simply look more like a disgruntled worker who did not get her way in an election and who is

now trying to overturn that election through the courts. However, this writer has been in the same system for 30 years and does not remember an election over which union is supposed to represent the workers in the system. This is a problem that needs to be remedied with more frequent elections to recertify the union or vote in a different union. This way workers are actually able to make a choice and have input. Then the argument that the democratic process should not be challenged has more legitimacy.

Strict Scrutiny should be the standard that is used to decide if a state has a compelling need to have an agency shop arrangement. State law that interferes with a fundamental right can be upheld if the state shows a compelling need for the law. States should have the right to negotiate with their employees as they see fit. Schools should not be forced to follow federal dictates on relationships with their workers. The state may not be able to present a compelling need for the use of agency fees. However, they may be able to show a compelling need for the use of agency shop agreements for collective bargaining. All states and the federal government may not require agency fees, but they all use unions to negotiate contracts. Workers should not be on their own to negotiate wages and benefits. It is hard to imagine a system where every employee hired their own attorney or tried to negotiate on their own. Workers could lose their ability to make important choices about workplace governance as well as effectively negotiate contracts. It would take the state tremendous resources in terms of the numbers of negotiators and time it would take to settle contracts individually. Certifying an elected union to conduct the contract process is the most practical way to conduct this business. Also, it is the only way to make sure there is only one contract and only one pay scale. Multiple contracts will only raise challenges and potential discrimination claims. Individuals would also be too burdened with an individual system. With the average attorney charging \$300 an hour, workers would find they need to contract in groups or find any pay raise going to attorney fees to negotiate the contract.

The IFO countered Uradnik's arguments by pointing to two court cases. In *Minnesota State Board for Community Colleges v. Knight*, (1984), the IFO says the Court already rejected a First Amendment challenge to a union's exclusive representation of faculty in the Minnesota Community College system. This case could be used to appeal to Kagan and others who still give more than lip service to stare decisis. Uradnik counters the *Knight* decision by pointing out that the case does not support a union's exclusive representation of nonmembers because there was no issue or discussion of compelled speech. Also, on August 14, 2018, the IFO tried to use the fact that the U.S. Court of Appeals for the Eighth Circuit reaffirmed the constitutionality of exclusive representation in certain bargaining activities under Minnesota law (*Bierman v. Dayton*, 2018). The Circuit Court said *Janus* did not mention *Knight* nor supersede it (Iafolla, 2018). However, the U.S. Supreme Court is not bound by what an appellate court decides.

While this writer sees many practical arguments that could rise to the level of a state being able to argue for a compelling need to negotiate through unions. Alito, in *Janus*, wrote that a union, as the exclusive bargaining unit, is a "significant impingement on associational freedoms that would not be tolerated in another context" (*Janus v. AFSCME*, 2018). The Court, as in *Janus*, may not see unions as the solution. The resolution of *Janus* and now *Uradnik* could have wide reaching effects. If the Court abolishes exclusive representation in the public sector, this decision could spill over to

the private sector. This could still happen with *Janus* and agency shop fees. Maybe a different end result for *Uradnik* could be multiple members-only unions representing different fractions of employees working alongside each other. But, just as with every employee negotiating their own contract, this could result in an unworkable and overly complex system. It does not lessen problems. Worse, the arrangement could cause worker strife and a loss of cohesion through a loss of solidarity to one union and feelings of competition between unions.

### **Is There Still a Future for Unions?**

If *Uradnik* wins her case, the future for unions will be very bleak. Unions lost stable funding in the *Janus* case. If unions cannot be designated as the sole negotiator for groups of workers, collective bargaining, and therefore unions, will die.

There are things unions can do about the loss of funding from *Janus*. Alito suggested unions could charge nonmembers for representation in disciplinary actions or refuse to represent nonmembers. However, this does not mean that all state laws currently allow for this. Also, this would divide workers and undermine solidarity. Only united are unions powerful. Despite Alito's suggestion, unions should avoid the temptation to divide workers and treat workers differently (AFSCME, 2018). Anti-labor groups are hoping workers will quit the union to give themselves some extra pay (Kamper, 2018). This writer expects anti-labor groups to go worker by worker to convince people to end their union membership and give themselves a pay raise by saving union dues. These groups will be successful with some workers. It is human nature to try to get something for free. Why stay in a union when one can get the same benefits for free?

What should unions do? First, unions need to increase communication with their members. Only if workers are aware of what is happening, can workers inoculate themselves from tactics to abandon their union (Semuels, 2018). Second, unions need to investigate their history and teach that history. People do not know, through concrete examples, how unions have helped workers in the past. Union solidarity and benefits are just not taught in schools anymore, even in what used to be pro-union states (Bruno, 2018). They were taught in Minnesota history classes because of the strong influence of the steel mines in Northern Minnesota. Third, unions have been given the exclusive right to represent all workers in the workplace. Unions need to take this task seriously. Unions need to show self-restraint and avoid becoming political on topics beyond their workplace needs. They were put on notice in 1977 in *Abood* that too much involvement in one political party or too much involvement with politicians from just one party would not be tolerated with forced dues. Unions serve workers who are Republicans as well as Democrats. Unions need to focus on contracts and salaries. Workers who want to enter the political arena can do so on their own. Unions should not get in front of their legislatures, governors, or courts. Laws should not be made or changed through union contracts. Policies should be pursued through lawmaking branches of government instead. Fourth, unions should have more listening sessions (Berkovitz, 2018). When everything comes to people from a mass meeting in an auditorium, it is hard to build individual communication with members and demonstrate that the union cares about individual members. Fifth, unions need to stand as a rallying point for worker solidarity. They should not fall into the trap of degrading people who are not members of the union through sharp verbal cuts or degrading words. Better to



encourage workers to join unions than have unions ignore or at worse degrade workers who are not members. The focus needs to be on building solidarity through inclusion and collective support. Support, through help when most needed such as in contract disputes. Finally, there are some additional things unions can offer. Professional development training in seminars and workshops, or classroom support, could be offered so workers can better do their jobs. These activities are always appreciated (Hertel-Fernandez & Porter, 2018). The union definitely would appear inclusive and caring. Unions could emphasize more in-person socialization so genuine concerns are not tossed aside as junk email. Actual social activities that build comradery would go a long way toward attracting and keeping members.

In states that are more pro-union, an effort should be made to get the names of new employees so they can be contacted in the early days of starting a new job. Some states allow access to personal contact information and work space for meetings with new members. Some states also do not release new employees addresses and phone numbers to others. This slows down the ability of anti-union organizations to contact new workers before the union gets an opportunity to contact the new employee (Barrett & Greene, 2018). Finally, while union dues cannot be deducted on taxes, maybe the state could pay people who join unions less. If someone makes \$50,000 and union dues are \$1,000, maybe union members could be paid \$49,000. That would lessen the union member's tax bill a little while still providing unions with money to operate (Hemel & Louk, 2018). Finally, for the states most tolerant of more forceful activity, unions should remember the First Amendment is not just a weapon that can be used against the union. As Carney (2014) suggested maintaining the solidarity of workers is a small price to pay for workers to collectively influence their workplace.

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A Tale of Two Clerics: Propaganda and Religion in US and  
Turkey

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## **Abstract**

*An examination of the use of faith based propaganda to secure and cement electoral/regime support domestically and to pursue policy objectives internationally. The word propaganda, at least its Latin version, made its appearance during the Thirty-Years War when the Vatican established Congregatio de Propaganda Fide (Congregation for Propagation of the Faith). This new approach by the Vatican replaced the crusades and inquisition as mechanisms to control/counter the reformation and was designed to better exploit the new technology of the printing press. After the Treaty of Westphalia established the modern nation-state system and settled the issue of religion in the newly sovereign European nation-states, the new Vatican institution directed its attention eastward and toward the colonies, that is to say Turkey and protestant America. Although Vatican activity in both arenas virtually disappeared, the use of propaganda on the religious front continued following the American Revolution as US Protestants attempted to spread the faith, often with state backing, in Turkey generating both religious and governmental resistance and counter measures. These long standing multi-directional propaganda dynamics took center stage again as two contemporary presidents' spared over the fate a terrorist Turkish cleric living in Pennsylvania who masterminded a failed coup directed against the Turkish leader and an American evangelist jailed in conjunction with the coup.*

## **Introduction**

Recently there has been a lot of discussion about the populist discourse of presidents as the voice of their governments. Some academicians have defined this as a period of post-truth in policy where propaganda rules. In this new era different meanings are often attributed to the same phenomena. We can no longer talk about a one way communication model because new technologies have changed the nature of political communication. Today, with the multiplication of channels mass communication has become very malleable. To deal with it would require more attention than in the past, but there is less time. Populist presidents understand this situation and employ a two prong approach: (1) They still limit access to alternatives where possible while (2) they overwhelm any that survive with excessive information.

Recently on the global stage religion has been resurgent and is now used to psychologically impact many aspects of economic, cultural and social policy as developments in technology and propaganda facilitate the exploitation of changing social conditions and consolidation of social connections. In this context, both presidents aim to mold and strengthen national identity and belonging using sociological and integrative propaganda techniques and methods to provoke and shape foreign political events for both international and domestic purposes.

Contemporary leaders in functioning two-party and multi-party systems of representation have adapted the methods of Paul Joseph Goebbels to create and maintain situations similar to that of Nazi Germany in which common citizens have no chance of choosing different options. The two-prong model works best when electoral competition is limited to two parties or a single party and a fragmented opposition

because only a single elected leader commands the legitimacy to control the both information flows. The presidential model of the United States has proven more amenable to these techniques than the parliamentary arrangement.

Although, historically, propaganda has taken many forms in various countries, communities and groups; it has been most effectively used by the post-war American presidents both to achieve international objectives and to use international crises to generate domestic support. This is an examination of how two contemporary presidents dealt with a domestic crisis that became an international issue and used it to consolidate support for their respective domestic nationalistic agendas. Good propaganda needs a human face: someone who committed a crime and/or an innocent victim, wronged because of his religious or ideological beliefs. The situation examined here involves two clerics: A Turk guilty of engineering a coup attempt against the president of Turkey and an American missionary accused of spying and conspiring in the coup effort. This brief study shows how the two leaders framed and promoted the international crisis to further their domestic agendas, and compares the differences and similarities in the approach of the leaders, their propaganda techniques and the structure of their discourse.

## **Background and Theory**

Since the first formal propaganda agency was established by the Catholic Church in the 17<sup>th</sup> Century to propagate the faith in the new age of the printing press and the nation-state it has become an organizational staple not only for religious organizations, but for revolutionary movements and many other types of social, commercial and political enterprises. In the 18<sup>th</sup> Century it was fueled by American Revolution and the founding of the new nation. The French revolution demonstrated its destructive powers and out of the ferment of the ideological crises Napoleon emerged to demonstrate the true power of propaganda to mobilize people by combining nationalism and liberalism into a new kind of faith (civic religion). His imperial plebiscite, in various guises, remains the stable of contemporary presidential regimes. Although the lessons of Bonaparte's rise remain, any lessons from his fall were drowned in the celebration of success by the victors who continued to perfect their respective propaganda operations into the 20<sup>th</sup> Century. The result was possibly the greatest unexpected consequence in history: World War I. Propaganda run amuck—nobody expected it and they couldn't stop it. After the war radio and motion pictures became available to augment the propaganda efforts that precipitated and fueled the second round of global conflict. By mid-century war had been replaced with defense and television was the new medium for cold war propaganda. When the cold war ended at the dawn of the 21<sup>st</sup> Century, computers and associated information technologies made propaganda techniques developed for large scale organizations available at any scale.

At the end of the cold war Nimmo and Combs (1993) named Machiavelli as the originator of the theory of propaganda, but the systematic study of it only took hold after World War I. Martin (1932: 29) started it off with an attack on the whole effort in the name of education: "Propaganda is not education, it strives for the closed mind rather than the open mind. It is not concerned about the development of mature individuals. Its aim is immediate action. The propagandist merely wishes you to think as he does. The

educator is modest, he is so delighted if you think at all that he is willing to let you do so in your own way.” Harold Lasswell (1935:189), then launched the academic study of propaganda as “a technique of social control through the manipulation of collective attitudes by the use of significant symbols”. Huxley (1936:39) gave Lasswell a democratic spin and opened the field to objective study: “propaganda gives force and direction to the successive movements of popular feeling and desire”. During the cold war Qualter (1965: 27) concluded that propaganda is merely “the deliberate attempt by some individual or group to form, control, or alter the attitudes of other groups by the use of the instruments of communication, with the intention that in any given situation the reaction of those so influenced will be that desired by the propagandist.” Finally, to really muddy the waters in the 21<sup>st</sup> Century Noam Chomsky (2002: 21–22) observed that “propaganda is to a democracy what the bludgeon is to a totalitarian state.” Thus, harkening back to de Tocqueville (1945: 272) when he applied the lessons of the French revolutionary sequence up to the 2<sup>nd</sup> Republic to the United States in the 1830’s.

Fetters and beadsmen were the course instruments that tyranny formerly employed...Monarchs had, so to speak, materialized oppression; the Democratic republics of the present day have rendered it as entirely an affair of the mind as the will, which it is intended to coerce. Under the absolute sway of one man the body was attacked in order to subdue the soul; but the soul escaped the blows, which were directed against it and rose proudly superior. Such is not the course adopted by tyranny in democratic republics; there the body is left free, and the soul is enslaved. The master no longer says: “You shall think as I do or you shall die”; but he says: “You are free to think differently from me and to retain your life, your property, and all that you possess, but you are henceforth a stranger among your people.

Jacques Ellul (1973) observed how this developmental sequence accelerated over the next 150 years to the point where technique itself held global sway over all human actions and institutions. Here is how he updated his countryman:

It is a fact that excessive data do not enlighten the reader or the listener; they drown him. He cannot remember them all, or coordinate them, or understand them; if he does not want to risk losing his mind, he will merely draw a general picture from them. And the more facts supplied, the more simplistic the image"... caught in a web of facts they have been given. They cannot even form a choice or a judgment in other areas or on other subjects. Thus the mechanisms of modern information induce a sort of hypnosis in the individual, who cannot get out of the field that has been laid out for him by the information...It is not true that he can choose freely with regard to what is presented to him as the truth. And because rational propaganda thus creates an irrational situation, it remains, above all, propaganda—that is, an inner control over the individual by a social force, which means that it deprives him of himself (87).

He closed the circle when he concluded, as the pope must have when he set up the original congregation, that “Knowledge of fact comes down to a question of faith”. The new faith he observed replaced the universal (catholic) church with the universal technique that defines modernity. Propaganda is the product of technique and it can



now be used by state agencies through propagating the faith to maintain the civic religions of nationalism. Political propaganda can be broken down into eight categories with three paired dimensions. *Political propaganda* which has political ends and is carried out by a political body as an aspect of overall *sociological propaganda* which is much more difficult to grasp as it is the penetration of an ideology by means of sociological context. The six other categories on three dimensions are useful in explaining political propaganda: (1) *Agitation propaganda* which seeks to destroy the government or the established order confronts or compliments *integration propaganda* that aims to unify and stabilize the society by getting the individual to participate in its activities in every possible way. For this purpose, the individual must share the stereotypes, beliefs and reactions [myths] of the group. (2) *Vertical propaganda* which is the classic form where the leader acting from his superior power position counters or utilizes the *horizontal propaganda* that is made inside the group where individual actors are seen as equal. (3) *Irrational propaganda* that appeals to our emotions through myths and symbols counters or is subsumed by *rational propaganda* through its use of facts, statistics, and graphs.

Ellul's conclusion is that "Purely emotional propaganda is disappearing. Rational propaganda is taking its place. Its aim is to form an impression, totally emotional, although based on the rational data supplied by the propagandist." This totally emotional rationality--is the key to understanding the propaganda about the clerics that is, in similar ways, simultaneously vertical and horizontal, agitational and integrational; and rational and irrational (63-86).

Because there is a close relationship between power and knowledge Foucault (1980b: 31) observed that continuity over time is necessary within states. Governments must produce, control, distribute and maintain knowledge to guarantee their survival in today's democracies. Sennet (1980: 57) asserts that individuals in social structures look to authority for security and strength and that authorities must control discourse in order to maintain this discipline, sovereignty and security within their jurisdictions.

In order to internalize and legitimize the proper understanding of authority, public institutions disseminate knowledge of the power structure through the media to the community. Institutions, such as army, police, courts, prison, etc., that underpin the social order support authority and provide security (Althusser, 2014: 62-63). The sovereign will must be communicated through the ideological apparatus of the state that passes all kinds of information through its power filter and supervises public administration.

The decisive power of media in the politics of democracies is the result of the relationship in which power is obtained through discourse. This situation is often better understood by opposition politicians and is apparent in the pre-referendum processes, but to retain power, those in control must maintain the ideology by reproducing the dominant discourse continuously. In this context, the media, where discourse is produced and distributed to the masses, is of prime importance. Power is not a force possessed by a set of actors to realize their interests; it is a social interaction. For this reason, according to Foucault, the basic principle of having power and staying in power is the continuous regulation of relations. Media and communication systems as

intermediaries for the continuous regulation of relations, as well as the structure that regulates and supervises the interaction between the collective or individual parties, determine how much control authorities have and how the public makes sense of the world. The media industry is directly related to a large number of power centers, such as financial organizations and political actors worldwide (Bagdikian, 2004: 9). The media orients policy and justifies sovereign power. The media is a propaganda tool, controlled by the dominant powers and used by their ideological apparatus to manipulate people's minds. In human communities control breaks down in times of crisis.

Propaganda can be used to ferment a crisis, but it is very effective in crisis situations regardless of the cause. Different types of propaganda create images and win popular support to carry, spread and reinforce doctrines, theories, and opinions in different situations. The following typology was around before Trump made fake news popular. Since “fake news” is now the backdrop, this typology is particularly useful in the case of the clerics:

*White propaganda* uses authoritative materials that come from official sources [real news], couched in artistic and cultural contexts, that appear to be harmless, to psychologically validate the story.

*Black propaganda* is "fabricated" material, real fake news, falsely attributed or attributed to fabricated institutions so that the receiver has no control.

*Grey propaganda* which is frequently used by information centers, combines real information with fully fake news to construct news that appears to be precise, but cannot be fully verified. The public can be easily misled by such fabrication, attributing problems to personal information gaps.

## **Organizing Framework**

After the trauma of Watergate in the late 1970's, political scientists became aware that their empirical models, developed during the post-war era, were becoming increasingly less effective. The understandings that flowed from the old stable patterns captured in the models were called into question. The concept of the “iron triangle”, a favorite because of its explanatory scope, was so effective that as things changed in response to technological innovation and political intrigue no one noticed the emergence of new patterns beyond its scope. Hugh Heclo (1978: 87-124) was among the first to see the problem when he observed that “the iron triangle concept is not so much wrong as it is disastrously incomplete”. These new patterns accessible through the “issue networks” lens he developed revealed the increased scope of technique and the defused dynamics of propaganda in the information age. Heclo concluded, even before Reagan, that changes in the volume and nature of information and the networks that controlled it not only changed the patterns of governance, but the nature of American democracy.

The closed systems for compartmentalizing and controlling information captured by the iron triangle lens dealt with the dynamics of governing material growth in the

1950's where different material interests defended and expanded their influence/share by monopolizing and controlling information. As information exploded and the scope of governance increased new arrangements layered on top of the old. Eventually, these new networks became dominant as the spread of technique redefined the purpose of policy, which was transformed into issues processed through open networks or as Hecllo put it the "dissolving of organized politics and the politicizing of organizational life". Whereas, with identifiable, controllable power centers that had known stakes it was possible to agree on what could be done and the goal was to do what was right (worked for all concerned); in the issue world, where subject matter expertise is power, knowing what's right is the important thing and no policy (doing nothing) is better than bad policy.

The old adage "knowledge is power" takes on new meaning as expertise fuels the expansion of technique and redefines the stakes of US democratic competition on four fundamental dimensions:

*Complexity* Iron triangles simplify to arrive at broadly intelligible choices. In issue networks individual experts increase complexity to enhance their status and power in the network.

*Consensus* In an iron triangle agreement that something could be done produced policy consensus. Contending experts in issue networks insist on doing the right thing or nothing.

*Confidence* Iron triangles produced a context in which leaders were respected. Issue networks respect only expert knowledge; elected leaders become compromisers and dilators.

*Closure* Iron triangles needed to end debate and get things done. Issue networks, whose power derives from the intensity of the conflict about their issues must seek ever more conflict—closure is insanity.

The reach of technique in both the physical and social infrastructure is the measure of this latest manifestation of modernity. The difference in the level of its development and penetration between the US and Turkey determines both what a president can do and how it can best be done.

## **Timeline: The Facts**

This timeline is the result of a quick survey of the *New York Times* for the United States and *Hurriyet* for Turkey from which information flows were mapped and used to tell the tale. Since the spread of technique has given us a new kind of acronym with the media referring to Donald Trump as POTUS and building other designators—SCOTUS, FLOTUS and so on—from this root, PORT will be used for President of the Republic of Turkey with other designators built from this root for Turkey in the timeline and narrative that follow.

**July 15<sup>th</sup> 2016** - A Gulenist sympathizers remaining in the military using tanks, fighter bombers and helicopter transport managed to bomb the parliament, seize the airport and the main bridges in Ankara and Istanbul, kidnap several top commanders, and commandeer the national radio station long enough for one broadcast; but failed in their effort to capture the vacationing PORT. Stifled with aid from the public through use of social media the whole thing was over in six hours. In the end this terrorist incident resulted in some 250 deaths with close to 3000 wounded.

The attempted coup was a terrorist action carried out by Gulenists within the Turkish Armed Forces that called themselves the Peace at Home Council. In its only state television broadcast The Council cited erosion of secularism, elimination of democratic rule, disregard for human rights, and Turkey's loss of credibility in the international arena as justification for the coup.

After Turkish authorities linked the terrorist Gulenist Movement to the coup, PORT identified the exiled terrorist Fethullah Gulen, a Turkish cleric who had been living in the US for twenty years, as the mastermind who managed the coup from his compound in Pennsylvania.

**October 2016** – Andrew Craig Bronson, evangelical pastor of the Izmir Resurrection Church detained in connection with the coup.

**December 9<sup>th</sup> 2016** – COURT documents indicated that Pastor Brunson had been charged with “membership in an armed terrorist organization.” At the hearing the judge referred to reports indicating that he had been involved in espionage and long-term collaboration with both Kurdish and Gulenist terrorists.

**May 13<sup>th</sup> 2017** – POTUS made the detention of a US citizen, the American Pastor Brunson, one of the most important issues in bilateral relations at his May 2017 meeting with PORT. His strong reaction can be traced to the Anti-Turkish propaganda campaigns of non-governmental/religious organizations for the release of Brunson. The American Council for Law and Justice (ACLJ), whose executive director is the number two man on the POTUS legal team, was the most prominent. They secured 480,000 signatures on a petition demanding the release of Brunson and US Government action to secure it.

**September 28<sup>th</sup> 2017** – In a speech PORT pointed out that the US was harboring Fethullah Gulen, the terrorist who had masterminded the coup in Turkey. He suggested that Brunson might be released if POTUS would extradite the terrorist cleric. POTUS refused. The *Economist* declared Brunson to be "a pawn in the fight between the US and Turkey" as top leaders exchanged accusations and the international media warmed to the story ushering in one of the most troubled periods in US-Turkish relations.

**June 2018** – In Congress, senators expressed concerns about Turkey's growing ties to Russia and the Brunson case. A bipartisan bill that changed defense appropriations to block the transfer of F-35 fighter jets to Turkey, authored by Senator Thom Tillis and Jeanne Shaheen, was passed. Senator James Lankford initiated special legislation to prevent Turkey from degrading NATO, exposing NATO assets to hostile actors, degrading the security of NATO member countries, seeking to import weapons from a foreign country under sanction by the U.S., and detaining American citizens.

**July 18<sup>th</sup> 2018** – POTUS tweet, calls PORT's refusal to release Brunson a "total disgrace" and says that the pastor is being "held hostage".

**July 19<sup>th</sup> 2018** – PORT replies that Turkey has a government of laws and that he must comply with CORT decisions in the case of Brunson. PORT stated that an official request had been sent to the U.S. for the extradition of terrorist Fethullah Gulen: "We have sent four dossiers to the United States for the extradition of the terrorist chief."

**July 26<sup>th</sup> 2018** – POTUS called on PORT to release Brunson or face significant sanctions. On the same day, POTUS tweeted that the United States would impose sanctions on Turkey due to Brunson's detention. Apparently, moving Brunson to house arrest on July 25 was "too little, too late".

**August 1<sup>st</sup> 2018** – The U.S. Department of Treasury imposed sanctions on two top Turkish government officials Turkish Justice Minister Abdulhamit Gül and Interior Minister Süleyman Soylu. PORT described American actions in the case as "choosing a pastor above the strategic relationship between Ankara and Washington", and stated that Washington had "turned their back on Ankara", adding that it upset him.

**October 2018** – Trial begins and results in the release of American Evangelical Pastor Andrew. CORT delegation sentenced Brunson to 3 years, 1 month and 15 days in prison for intentionally and willingly helping a criminal organization. Brunson's house arrest and the ban on leaving the country were removed. Brunson was released considering the time he was detained.

**October 13<sup>th</sup> 2018** – Andrew Brunson appeared in the Oval Office with President Trump.

## **A Tale of the Clerics**

Propaganda as technique spreads around the world as new physical technologies foster enhanced techniques among well-equipped and sophisticated organizations of all kinds. Since Innovations must be adapted for use in unique national settings, each country responded differently to this diffusion. The ill-fated coup aimed at PORT on July 15, 2016 activated Turkey's well-organized vertical propaganda apparatus to support counter measures against the Gulenist terrorists behind the coup. Spillover into the international arena and reactions inside the US triggered a two year long conflict over the fate of two clerics, a Turkish terrorist living in the US and an American evangelist working in Turkey.

### **PORT's Response**

Before the dust had settled, PORT returned to Ankara and launched a two pronged propaganda offensive against the terrorist, Fethullah Gulen, who had masterminded and managed the coup from his complex in Pennsylvania. Arrests, seizures and dismissals followed as law enforcement efforts discovered those

implicated in the coup attempt. The perpetrators were found to be part of the terrorist Gulen network still active in Turkey and supported by his well-entrenched international organization.

In September, as would be expected, Turkish authorities requested Gulen's extradition; the US did not comply citing lack of sufficient evidence. Shortly thereafter, Brunson was summoned by the police. On October 7, 2016, the American Pastor was detained for deportation. Subsequently, he was arrested and held on charges of participation in the coup, espionage and collaboration with Gulenist and Kurdish terrorists.

### **POTUS to the Rescue**

The family back home quickly alerted the evangelical issue network and the media in the US. As the news broke in the local Asheville, North Carolina paper and the national press, the American Council for Law and Justice (ACLJ), took up the fight providing lawyers for the pastor and a full horizontal propaganda and lobbying assault in the US and worldwide through their international network. Their efforts centered on the Whitehouse where the Executive Director and media spokesperson for the ACLJ is a leader on POTUS's legal team. ACLJ is a very technically sophisticated propaganda operation with its own think tank, publications and full access Christian broadcasting services through which it mobilizes the evangelical vote, a critical POTUS constituency. It was not the plight of the poor preacher that drew POTUS into the fray, but the horizontal flow of propaganda generated by the ACLJ that made the pastor an electoral issue. For the ACLJ Brunson was now the face of the issue; he represented all Christians imprisoned for their beliefs and global freedom of religion. Fox and CNN informed the public, but evangelical voters were tuned into the ACLJ shows on the Trinity Broadcasting Network (TBN). With mid-term elections approaching, POTUS would be seen as either for or against freedom of religion and Americans abroad being persecuted because of their Christian faith by the large evangelical voting bloc.

In the hyper-partisan context of issue networks POTUS is an issue-politician which in terms of propaganda can best be characterized as a truth manager. He is not an issue expert who creates, defends and sells the truth to the faithful on issues, but rather a manager who lines up the support of issue experts across networks to secure enough issue constituencies to win elections. To lose the support of a large constituency of true believers is to lose elections. POTUS is the master of the two pronged propaganda flow in the US: his top down message is simple and precisely targeted for each network—anything else is false news—simultaneously, he overwhelms other points of view with an excessive and confusing information barrage fueled and punctuated by his high profile tweets.

So, why not swap the clerics? The problem for POTUS, the deal maker, in this case was a second issue. Once both clerics were in the news both POTUS and PORT were caught up in the longstanding American "Hostage Issue". Since it is an undisputed article of faith in this core POTUS issue constituency that the US does not pay ransom or trade one innocent for another, the terrorist Gulen was safely out of play as long as Brunson was detained in Turkey. Any influence Gulen might have been able to wield in the US was beside the point.

## **POTUS v. PORT International Crisis and Domestic Propaganda**

In Turkey as a terrorist threat Gulen combines violence as represented by Osama Bin Laden and sociological subversion like Ayatollah Khomeini, but more dangerous. Why was POTUS unconcerned? Who is this terrorist? He is a businessman in the education business. Unlike his US counterparts in the ACLJ he is not involved exclusively or primarily in political propaganda, his terrorist activity involves sociological propaganda and he does it very well. He is the father of a service oriented “kinder gentler” Islam that he propagates by establishing non-denominational prep schools to groom students for state bureaucracies by getting them into the best universities—as illustrated by the military officers still on active duty who carried out the coup, they remain true believers after they achieve top governmental posts. The reputation of the schools attracts parents and provides a constant flow of the best students from all backgrounds. The charge leveled against him by PORT that he had created “a state within the state” was true 20 years ago. When this was discovered by the secular Kemalist government, in power at the time, Gulen was forced into exile.

Turkey, like most countries, is different than the US. Almost the exact opposite in two basic ways. It is statist while the US is anti-state, and it has a tradition of centralized power and strong leadership as opposed to the US constitutional arrangement of checks and balances and disperses power horizontally. In the Turkish arrangement power and legitimacy depend on the control of top down vertical propaganda. In this context a horizontal effort such as the ACLJ by threatening that control would threaten the state. This is precisely the terrorist threat that Gulen posed when he was forced to flee to the US. Having failed by peaceful means, he turned to violence. Raising this new double threat in conjunction with the coup worked very well for PORT. It supported the traditional Islamic stance of PORT’s Law and Justice Party while it neutralized the secular opposition by using their line on Gulenism against them. This secondary stream in the vertical flow even looked like an effort at reconciliation as it overwhelmed the opposition and drove home the Law and Justice Party’s “rule of law” message that was PORT’s salvation in the end.

The ACLJ had to put out a constant flow of defendants’ rights propaganda for home consumption that played into PORT’s rule of law defense and limited international options for POTUS. In order to move ahead as key legislators and VOTUS put increased pressure on him and threatened unilateral action, POTUS moved to the economic sphere. As CORT proceedings drug on and US sanctions impacted the Turkish economy, PORT went on the offensive with “rule of law” neutralizing ACLJ efforts by pointing out that charges had been filed and that things were in the hands of the “independent judiciary”. After the Lira cratered, CORT convened, found the American Pastor guilty of helping the criminal organizations with the attempted coup, and sentenced him to time served. He was instantly deported to Germany and the following day he blessed POTUS at a homecoming celebration in the oval office.

PORT emerged as the champion of “rule of law”. POTUS consolidated the support of two key constituencies and emerged as the champion of religious freedom who held the line on the American line on hostages. All’s well that ends well; effective use of technique carried the day for both.

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**Culture as a Tool and an Obstacle:  
The Mission Experience**

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## **Abstract**

Social science has long been interested in understanding culture and the spread and influence of one culture to another. In the modern era with advancements in travel and communication, the rapid rate in which culture is diffused is unprecedented. This study examines the recent interactions between 682 former missionaries for the Church of Jesus Christ of Latter-day Saints (LDS) and the countries in which they once served and finds that meaningful diffusion and assimilation took place among these missionaries. Although many studies have examined the influence of Christian missionaries on different cultures and the affect these cultures had on the missionaries, these studies focused on earlier times and with missionaries serving longer than LDS missionaries. With approximately 85,000 LDS missionaries currently serving throughout the world, it is important to understand what affects their experiences with different cultures and people will have on them and on the people they serve.

Culture is the defining characteristics of a civilization. Culture develops over time with various customs, ideas, and values being introduced and developed into society and the normative structure by which society attempts to govern itself is established. Parts of a culture endures for extended periods, but other parts are ever changing - some quickly and others very slowly or at such a slow pace that it seems to be constant.

Much of the change that occurs in a culture can be explained by diffusion, a social process through which ideas, technology, practices, and parts of the normative structure are spread from one group of people to another (Ogburn, 1922; see Rogers, 1995). Historically this diffusion moved from one group of people to a contiguous group, or one that was nearby geographically (Brown, 1989; Rogers, 1995; Tolney, 1995). As these groups interacted for purposes of trade, conquest, or travel, change took place within each (Burt, 1987; Fliegel, 1993; Rogers and Kinkaid, 1981; Rosero-Bixby and Casterline, 1994).

In earlier times, such contact took place with groups that lived close to each other. Other contacts came about only with conquest, long marches, or dangerous sailing, which usually had accompanying hardships, cost, and danger. Over time, travel and communication became easier and more frequent and thus the influence of diffusion can take place more often and more rapidly in today's world. The development of jet aircraft, for example, has permitted frequent travel among members of different societies around the world, and the development of computers, and its offshoots such as the Internet, email, and Facebook, has brought about almost instant communication and more frequent contact among different peoples.

Although increased interaction may at times give rise to contention and conflict, studies indicate that more frequent contact and familiarity tends to increase positive feelings among societies and people (Dewar and Dutton, 1986; Rogers, 1995). Thus, the more the interaction among individuals from different societies, the more the attraction process increases, resulting in the people in one society liking the others and adopting at least some elements of their culture.

Over centuries, one of the groups in which diffusion and assimilation took place was among Christian missionaries. Some of those missionaries traveled to *save the heathen* with the goal of making Christians of the non-Christian, while others attempted to ameliorate the problems individuals faced or to uplift society as a whole. Historically these encounters resulted in changes in the missionary and in the host society who was the target of the effort. These interactions yielded assimilation of some parts of the culture by the other society, although not necessarily as the missionaries would have liked (Barber, 1995; Bourne, 2002; Brockey, 2007; Hackel, 2005; Kidwell, 1995; Lightfoot, 2005; Martin and Nicholas, 2010; McLoughlin, 1995; Natarajan, 1977; Stamps, 2002; Taylor, 1984).

To gain a better understanding of diffusion and assimilation, particularly among modern day missionaries, this article examines recent encounters among former missionaries of the Church of Jesus Christ of Latter-day Saints (LDS) and the countries in which they served. Using data from 682 former Mormon missionaries, this study

examines diffusion and assimilation by looking at how many of these former missionaries have returned to their missions to visit or live, married someone from their missions, continue to speak and read the language they learned on their mission, and evaluates the interchange of customs and mannerisms between the missionaries and the natives.

## **Missionaries of the Church of Jesus Christ of Latter-day Saints**

For decades the LDS church has taught boys at an early age to prepare to serve a two-year mission when they are 19 years of age. Girls are also taught they can serve missions, but it is not emphasized and they are not necessarily encouraged to go on missions. The relative number and percentage of missionaries by sex has varied over time but now, as in the past, there are far more missionaries who are young men than young women (Walch, 2014).

The LDS church has missionaries throughout the world and chooses where each missionary will serve. After submitting their mission papers, the prospective missionaries and their families eagerly await where they will spend the next two years of their lives. Most often the missionaries and their families pay for the mission and are not paid or reimbursed for their service.

Missionaries are assigned a companion and are with that companion 24 hours a day until the companionship is changed, which usually occurs after serving together between one and three-or-more months. As with the mission assignment, missionaries do not choose the companions with whom they will serve. Missionaries who are sent to foreign countries usually have to learn another language, and it is not uncommon for American missionaries who are serving outside the United States to serve with missionaries who are not from the United States, many of whom do not speak English.

In October 2012, at the church's semi-annual General Conference, Thomas S. Monson, president of the LDS church, announced the church was lowering the age for young men from 19 to 18 years old and for young women from 21 to 19 years old. The result was an immediate influx of young men and young women entering the mission field, increasing the number of missionaries from about 58,000 when the announcement was made to over 85,000 in 2014 (Walch, 2014). There have never been more LDS missionaries in the field than now.

## **Method and Data**

To learn more about the cultural assimilation among missionaries and their host missions, students in introductory sociology classes at Brigham Young University were asked to obtain information from individuals within the Church of Jesus Christ of Latter-day Saints who had completed their missionary service. These general education or core classes were selected because students from various fields of study were enrolled.

The students were instructed to obtain information from five returned

missionaries, three of whom were to be at least 50 years of age. Some of these individuals (returned missionaries) were other students attending Brigham Young University, some were family members, and others were acquaintances or others whom the students found cooperative with the project. It was assumed that many of the respondents would be young university students and therefore would not have had enough time to visit their mission field following their mission. On the other hand, those over fifty years of age would have been off their missions for decades, which would facilitate finding out more about possible long term ties with people in their mission field, and to examine whether the possible assimilation that may have occurred had made any permanent changes. Respondents were asked whether they had returned to visit their mission area, married someone from the area in which they served, retained customs and mannerisms from their mission areas, were aware of missionaries transferring customs and mannerisms to the people in their mission area, whether they still speak and read the language of their mission, and how many returned to live in the area of their mission.

Usable information was collected from 682 returned missionaries. This is an accidental sample for purposes of illustration and is not representative of all returned missionaries of the Church of Jesus Christ of Latter-day Saints.

Recent scholarship suggests that “LDS missionaries are perhaps the best type of subjects...to testing intercultural theories,” such as assimilation and diffusion (Callahan 2010, pp. 4-5). As a result, LDS returned missionaries have increasingly been the focus of research, particularly those studying social and cultural processes (e.g., Aaby and Hvalkof, 1981; Alves, 1985; Bastian, 1985; Camaroff, 1985; Camaroff and Camaroff, J. 1986; Flora, 1976; Harding, 1987; Knowlton, 1982; Knowlton, 1988, Knowlton 2001; Kogan, 2009; Numano, 2006; Numano, 2010; Stoll, 1991; Underwood, 2000).

LDS missionaries live in the assigned country for at least 22 months for men and 16 months for women (they train the first two months in a Missionary Training Center, which is sometimes in the country in which they will serve) and are fully enveloped in the culture and people. Although willing to serve where they are called, they do not choose where they serve and thus likely have had little knowledge and interaction with a country and its culture before they are sent on their missions. They learn the language of the country in which they serve and have dinner in people’s homes, preach the gospel in the streets, shop in the stores, often have companions from another country than theirs, and in many other ways are divorced from the comfort zone of home. Even missionaries who serve in their native country are sent to different parts of their country, and live with companions and associate with people who may be different from themselves in cultural characteristics, race and ethnicity, socioeconomic status, and other background and personal characteristics. Regardless of where they serve, the missionaries are exposed to other types of people, and in turn, they are exposed to new ideas, customs, and mannerisms.

## **Findings**

Table 1 shows that missions had a profound effect on returned missionaries and suggests that diffusion and assimilation took place. When asked whether they had visited their missions subsequent to their release from their mission, 55 percent said they had visited their mission area. There were a total of 818 visits made to the mission area in which they served, ranging from those who had only made one visit to a high of 50 visits. Most of the visits were by older returned missionaries and many of the missionaries who had not visited volunteered that they planned to visit in the future.

Table 1 about here

Most former missionaries want to return to their mission fields because they love the people, the food, the beauty of the place, among other reasons, and often want to share their experiences with their spouse and other family members. A return to the mission field provides additional reinforcement or perhaps even introduction of new elements of the culture to assimilate, as well as an opportunity for family members who have traveled with the returned missionary to be introduced to the culture. In addition, the fact they make return visits to their missions is a likely indicator they have already shared their experiences and love of their missions through the years with family members, and perhaps even those they associate with outside their families. This additional exposure indicates positive feelings toward the people and land of their mission.

Another factor that would impact the inter-cultural contact would be marriage to a person from the mission field. We found that 11 percent of the missionaries married a person from their mission, and some of the respondents were not yet married and may still enter into such a marriage. Such a commitment would place former missionaries in a position to be more permanently exposed to these cultural influences, perhaps resulting in couples speaking to each other in languages other than English, leading to more trips to the mission area, and, if nothing else, having a shared experience of a different culture. In addition, the children would have increased two-culture exposure compared with those whose parents were not from different cultures.

Former missionaries who served in a foreign-language speaking mission were asked if they still spoke or read the language of their mission. Ninety-three percent reported that they can still speak the language and 54 percent of them still read in the language occasionally. Many said they seek people to speak with so that they can use the language they spoke on their mission. Language is a critical factor in diffusion among people. Language takes people beyond their immediate experiences and environment and allows culture to develop. A shared language helps people better understand the past and develop a shared perception about the future, which leads to social change, diffusion and assimilation (Tiemann, McNeal, Lucal, and Ender, 2010).

Gestures and mannerisms are another important way in which individuals communicate with one another. Gestures and mannerisms at times facilitate communication but also can lead to misunderstanding, embarrassment, or worse, because they vary so much around the world (Rogers, 1995; Tiemann, McNeal, Lucal, and Ender, 2010). This study found that even though most returned missionaries speak the language, have visited their mission fields, and clearly have an affinity and love for the area in which they served, only 17 percent indicated that they still had mannerisms,

customs, and behavior that they had acquired in the mission field. These included eating different foods, cooking differently, removing shoes when in the house, snapping fingers, kissing on the cheek, crouching on the knees, learning to like different music, burping, rapping, breathing in as one speaks, pointing with the lips, using decorations in the home like they saw on the mission, using slang from their new language, and dressing in different styles. It seems the missionaries adapted while on their missions, but once they returned home they resumed the customs and manners they held the first 19 years of their lives and never lost when they were on their missions.

Interestingly, more returned missionaries (24 percent) thought the natives in their mission picked up some customs and mannerisms from the missionaries. These included missionaries teaching the natives to use different foods (such as popcorn and pancakes), shaking hands, using different phrases of slang, getting married instead of cohabitating, having better hygiene habits, giving each other *high fives*, and hugging. Some reported that infants were named after missionaries, thus introducing new names into the culture. Such diffusion is unlikely with limited contact among cultures. The instances returned missionaries thought of were likely from converted members of the LDS church who typically would have frequent contact with American missionaries, ranging from Sunday church services to missionaries visiting their homes to teach lessons or have dinner. The constant interaction with American missionaries is likely needed for the transmitting of American customs and mannerisms (Rogers, 2014).

## **Conclusion**

This study found that diffusion seemed to have taken place at many levels. It is significant that it occurred in a group that spent no more than two years in an area and did not have a choice in going to the mission they were assigned. They volunteered to go without knowing whether they were going to be assigned to Paris, Texas or Paris, France, and very likely did not grow up wanting to go to the area they ended up being assigned to. Rather, their purpose was to spread the gospel in whatever corner of the world the church would send them. Although most of them would have seen their goal as the spread of the gospel, they immersed themselves in the area, the language, and the culture, and returned from their missions in love with the people, the country, and their missions. This affection for their missions is manifested in their retaining their language skills, traveling back to their mission areas, and even marrying those they met on their missions, among other things.

These findings should be considered by countries that host missionaries. Some countries are reticent or do not give visas to Americans to serve missions in their countries. They do not want the religion spreading in their country, and relatedly, fear losing their cultural identity to what many identify as an American church and American culture. Given that 25 percent of the returned missionaries believe that missionaries did transmit parts of their culture and customs to the natives, this is perhaps a valid concern. However, this study also shows the tremendous goodwill that develops between missionaries and the people they leave behind. Returned missionaries become effective ambassadors when they return home for the countries in which they served (Stamps, 2002, 110).

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**Table 1.**

**Engagement of Return Missionaries by Percentage & Total Number**

Sample Size	682
Gender	
Males	84 (574)
Females	16 (108)
Location of Mission	
Foreign, Non-English Speaking	35 (237)
Foreign, English Speaking	6 (42)
United States	59 (403)
Return to visit mission area	55 (378)
Married someone from the area in which they served	11 (74)
Still have customs and mannerisms from their mission area	17 (116)
Aware of missionaries transferring customs and mannerisms to the people in their mission area	24 (164)
<i>Foreign Speaking Missions (N=237):</i>	
Still speak the language of their mission	93 (220)
Still read the language of their mission	54 (128)
Returned to live in the area of their mission	19 (44)

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**TITLE**

Application of Critical Success Factors in Medical Social Science

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## INTRODUCTION

This study was conducted within the paradigm of medical social science, which is a multi-disciplinary approach to studying human phenomena by combining methods and perspectives of both the social sciences and the medical sciences. This fusion of disciplines has been most prevalent in public health to help address large complex challenges such as HIV/AIDS; tobacco use; the opioid crisis; and the recent rise of chronic diseases associated with lifestyle, such as diabetes and cardiovascular disease. Both the World Health Organization (WHO) and the Centers for Disease Control and Prevention (CDC) embrace medical social science as very useful in their myriad and ever expanding scope of public health and population health activities.

Currently, limited scientific research exists about medical laboratories in developing countries implementing quality management systems with the goal of earning laboratory accreditation. The problem presented in this research is determining those factors laboratory staffs in Vietnam cite as critical to successfully implementing QMS and to improve laboratory accuracy and services. Accredited laboratories in other developing countries include national reference laboratories, provincial laboratories, HIV-laboratories, and district laboratories, suggesting neither the level of the laboratory nor its testing menu is the primary factors for achieving accreditation. Laboratory testing in developed and developing countries is vitally important to patient diagnosis, treatment, and healthcare in general. A mixed study using qualitative and quantitative analysis identified critical success factors.

The application of medical social science in the current study of laboratories in Vietnam is yet another example of its utility for addressing and solving real world problems. Below you will see the PowerPoint outline of the study as it was presented at the National Social Science Conference in New Orleans, 2018.

## Overview / Objectives

This presentation answers questions on the following objectives:

- Discuss the need for identifying Critical Success Factors (CSF) in Medical Laboratories in developing countries
- Explain the application of Critical Success Factors as a Methodology
- Discuss the Medical Social Science Impact on Global Public Health Systems
- Identify the top five CSFs and top five Barriers to improving medical laboratories in developing countries
- Summarize the significance of reported findings



## Critical Success Factors\* (Definition)

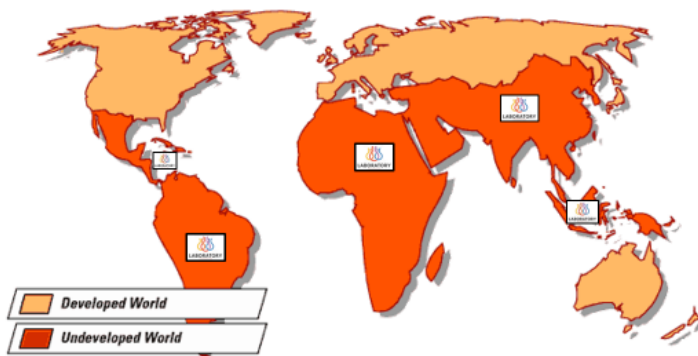


- Limited number of areas in which results, if satisfactory, ensure successful competitive performance for the organization's project
- The few key areas where things must go right for success
- If results in these areas are not adequate, there is a decrease in the organization's effectiveness to reach goal

\*D. Ronald Daniel (1960s) and John F. Rockart (1970s)

D. Ronald Daniel first presented the idea of CSFs in the 1960s. It was then built on and popularized a decade later by John F. Rockart, of MIT's Sloan School of Management, and has since been used extensively to help businesses successfully implement their strategies and projects. Inevitably, the CSF concept has evolved and been implemented in different ways. This provides a simple definition and approach based on Rockart's original ideas. Rockart also concluded that CSFs are **"areas of activity that should receive constant and careful attention from management."** Critical Success Factors are strongly related to the mission and strategic goals of a business or project. Whereas the mission and goals focus on the aims and what is to be achieved, Critical Success Factors focus on the most important areas and get to the very heart of both what is to be achieved, and how you will achieve it.

### Background/Need for Dissertation Research Study



The United States President's Emergency Plan for Aids Relief (PEPFAR) began in 2003; with its purpose to provide assistance to developing countries combating the HIV/AIDS pandemic. Originally, 15 developing countries were identified as having the highest rate of HIV prevalence and received funded through PEPFAR. Accurate HIV diagnosis, decreasing HIV infectivity rates, disease surveillance, and outbreak response were crucial to halting the disease and providing healthcare with the long-term goal to

eliminate HIV/AIDS. Billions of US dollars were pledged along with contributions from other developed countries. Initially, laboratory services were not included in the plan to improve the accuracy of patient testing to improve the accuracy of HIV identification. After a global call to country governments, laboratory services were added to the list of critical resources needed to stop the spread of HIV. Standardized training, implementation, and auditing programs were developed for global distribution as a way to improve the quality and accuracy of laboratory testing and patient results. Over 1100 laboratories in 42 countries adopted this program, worked to implement quality management systems and to earn ISO 15189 international laboratory accreditation. Of this number of laboratories, 80 labs have reported success in implementing quality management systems (QMS) into their laboratories and earning ISO 15189 accreditation.  $80/1100 = 7.3\%$ . With finite monetary resources, and the goal to improve public healthcare, a study of the critical success factors as reported by individual laboratories was needed.

Ebola, MERS, Zika, Nipah virus, and Rift Valley and Lassa fever are other infectious diseases with active outbreaks in June of 2015-2018. In addition to HIV, these diseases move around and can crop up — and if they find the right environment they have the potential to explode,” Dr. Richard Hatchett (CEO of CEPI). And that kind of outbreak situation doesn’t just threaten the folks in the epicenter of the outbreak — it has the potential to shake global stability. “Not only are individual lives at stake, but as we have already seen, a crisis such as pandemic flu, SARS, or Ebola can devastate entire health systems and economies, stall future development, and even lead to political instability,” Rebecca Martin, director of the Center for Global Health at the CDC, told HuffPost. “Gaps in public health emergency response capabilities remain a serious vulnerability for the entire world,” she added. “While we don’t know when or where the next pandemic will occur, we know one is coming.”



Why Study Vietnam?

Why Labs in Ho Chi Minh City?

CSFs have been studied and identified for many types of businesses and organizations. CSFs first found value and acceptance in manufacturing companies – Cars, utilities, construction – where the Iron Triangle of Cost, Quality, and Access was used to measure success. In the realm of Global Health, additional measures are crucial to successfully implementing and sustaining global healthcare. Studying the

component players in the medical laboratory unit was needed to identify both the CSFs and the barriers impeding laboratory improvement.

## Strength of CSFs in Medical Social Science

- The sampling methods were determined by characteristics of a new field of study and practice without a common definition
- Descriptive research methods integrated qualitative and quantitative data to reach conclusions
  - Qualitative research methods were designed to address questions of meaning, interpretation and socially constructed realities
  - Quantitative research methods ensured objectivity and reliability in the data generated

## CSFs & MSS Impact on Global Public Health



CSFs as a methodology in Medical Social Science (MSS) offer a comprehensive approach to identifying needs for medical laboratory improvement projects. This methodology encompasses the whole of a location and its people. Identifying CSFs and barriers is important, but more importantly, knowing WHY people DO things is critical to the change and improvement process. Identifying CSFs merges the strengths of both qualitative and quantitative data. Quantitative data (statistics) are objective and can be measured in many different ways. The culture, traditions, and resources of any given region are the critical knowledge for success and provide “why” answers to statistically findings. CSFs ask open-ended questions to identify factors in many areas: staff,

management, environment, internal and external, healthcare industry, and stakeholder support. Ignoring one category of factors makes the difference between failure and success.

## Top Five CSFs and Barriers to Improving Medical Laboratories in Vietnam

**Top Five CSFs to ISO Accreditation**

Rank	Critical Success Factor
1	Staff Knowledge of QMS
2	Laboratory Manager Leadership Knowledge
3	Staff Commitment to QMS Project Change
4	Mentorship
5	Hospital Administration Support

**Top Five Barriers to ISO Accreditation**

Rank	Barrier
1	Lack of Staff Knowledge (QMS)
2	Insufficient Hospital Administration Support
3	Ineffective Laboratory Management Leadership
4	Insufficient Laboratory Infrastructure
5	Lack of Sufficient Resources

This study found knowledge of quality management systems, laboratory leadership, staff motivation to the change processes, mentorship, and hospital support as critical factors in improving laboratory service quality. Ensuring staff knowledge, motivation, and commitment to the change processes in lab procedures increases maximum benefit of limited resources.

Each CSF category was assigned a frequency response rate and a weighted value. Frequency response rates were determined by adding the number of times each study participant response matched a CSF category. The CSF category with the highest frequency response was the most important CSF. Participants were also asked to rank order the CSFs they provided from 1 to 5, with one being the most important and five being the least important. Based on the ranking, each CSF received a numerical weight value. The CSF category with the highest weighted value was the most important CSF. Cohen's Kappa was the rigorous approach used to measure intercoder reliability.<sup>10</sup> Pearson's Chi square statistical test was used to identify any association between the demographic variables and the listed CSFs.



## CSF Benchmark Findings Vietnam, Kenya, Tanzania, Ukraine

Vietnam Study	BME 1	BME 2	BME 3
1. Staff Training	1. Training Staff	1. Staff Training	1. Training Staff
2. Lab Manager Leadership	2. Staff Attitude to Change Process	2. Staff Motivation to Change Process	2. Hospital Admin Support
3. Staff Commitment to Change Process	3. Hospital Admin Support	3. Mentorship	3. Staff Commitment to Change Process
4. Mentorship	4. Lab Manager Leadership	4. Lab Manager Leadership	4. Lab Manager Leadership
5. Hospital Admin Support	5. Embedded Mentorship	5. Hospital Admin Support	5. Mentorship

To strengthen the findings in this research study, national experts in Kenya, Tanzania, and the Ukraine were asked to be Subject Matter Experts (SME). Each SME managed one or more laboratory QMS projects in each respective country reporting partial or complete success in implementing QMSs and earning ISO 15189 international laboratory accreditation. The significance of these benchmark findings indicates developing countries share at least some of the challenges to laboratory improvement as well as identifying identical critical success factors.

### Laboratory Impact on Global Public Health

- Over 70% of patient **diagnoses** are based on laboratory results
- Laboratory results assist physician's & countries to monitor:
  - Treatment regimes for side effects and effectiveness
  - Disease surveillance
  - Outbreak response
- Initial reason to improve accuracy and reliability of laboratory tests in developing countries was to correctly diagnose patient HIV status
  - PEPFAR goals and metrics included # of people diagnosed and # of HIV (pos) people started on anti retroviral (ARV) drugs
  - **CSFs offer social scientists a method to meld many disciplines together to better serve the needs of developing countries**

A study completed by Robinson in 2018, demonstrates the interaction of medical and social sciences in identifying critical success factors (CSF) for medical laboratories in Vietnamese medical laboratories. Identification of CSFs offer a way to map out important areas and develop an improvement plan.

## Critical Success Factors Embrace Medical Social Science



- Study in Vietnam: Four medical laboratories
- Forty-four participants: 11 from each laboratory
- Included all levels of stakeholders: lab staff, lab management, administration, clinicians using lab services

Study identified participant responses to the following:

Benefit to self?  
Benefit to Laboratory?  
Benefit to hospital?

Benefit to clinicians?  
Benefit to patients?  
Benefit to Vietnam?

Robinson utilized statistics to show how many laboratories began laboratory improvements by implementing a QMS = 1,100 laboratories. Robinson also used statistics to identify how many laboratories earned ISO 15189 accreditation = 7.3% of the 1,100 labs = 80.3 laboratories. Applying the concept of content analysis, Robinson determined CSFs. The CSFs provided answers to “Why” accredited laboratories earned accreditation: offers security to staff to provide for their families, recognition of self and lab to community, their country, the world. Staff are proud their laboratory provides quality results to patients and improves health care. CSFs open-ended questions discovered challenges laboratory staff faced: staffing issues, infrastructure impediments, lack of knowledge, lab favoritism, administration lack of support (overwhelming at onset), lack of staff/manager commitment, unequal salary levels and personal issues.

### Significance of findings “36 Hours”



Dr. Inglesby (director of the Johns Hopkins Center for Health Security states: “They (diseases) do damage and they cause outbreaks and appear again. We don’t know when the next Ebola outbreak will come but we do know it will come again, and again, and again.” And when it does (come) — disease sees no borders. “We know that an outbreak that begins in a remote village can reach major cities on all continents, including here in the U.S., in 36 hours,” the CDC’s Martin said. “In today’s interconnected world, a health threat anywhere is a threat everywhere.” Labs must be prepared to react quickly. The first professionals to ‘know’ a disease, outbreak, terrorist action is the Lab- specimen collection, biosafety handling and transport, infrastructure, equipment, consumables to identify agent, standardization of lab practices and policies to communicate accurate information to clinicians are all critical components to a country’s health care, environment, to being a productive citizen ensuring political stability.

The Social Science findings provide the “WHY” for: laboratory professionals’ beliefs, responsibilities, acceptance and adherence to change, willingness to work in teams, commitment to medicine and patients, and their own well-being.

The “WHY” CSF findings help researchers/laboratories/countries adapt training programs, improve communication, form effective teams, motivate staff and stakeholders, and successfully implement QMSs, sustain QMSs to reach ISO 15189 accreditation.

A global goal focuses on the ability of all Laboratories to offer the same standards of testing performance and the same accuracy of test results to affect patient diagnosis, treatment, monitor health conditions, and detect disease outbreaks before they become epidemics.

## Impact of Accurate & Reliable Laboratory Results

### Facts on Patient Safety...

- There is a 1 in 1,000,000 chance of a traveler being harmed while in an aircraft
- There is a 1 in 300 chance of a patient being harmed during health care.



Medical laboratory services and systems impact global healthcare by making the following possible:

- Correct diagnosis versus wrong diagnosis for all patients
- Side effects from medication require 100% identification accuracy
- Patient kept on drug regime versus patient taken off of regime based on laboratory results

- Disease surveillance accuracy?
- Disability and/or death due to inaccurate test result (medical error)
- Population trust in a health care facility
- Maintain balance of healthy people to contribute to community, family life, work force, culture, economics, 'happy people'
- Pride in health care system
- Vietnam level of health care compared to other countries

**If we were 99.99% accurate, we would still experience:**

- 2 unsafe plane landings /day at O'Hare Airport
- 500 incorrect surgical operations each week
- 50 newborns dropped at birth by doctors daily
- 32,000 missed heartbeats per person/ year
- CSFs provide the 'why' answers to statistical findings

We have learned 7.3% of laboratories (80/1,100) successfully implemented a QMS, garnered staff commitment to the process, and earned ISO 15189 accreditation. Robinson's dissertation and this presentation offer evidence to why those 80 labs were successful, what their biggest challenges were, and suggestions on how other labs can also be successful.

## Summary

- Critical Success Factors in the Medical Laboratory arena are crucial to improving and sustaining global healthcare
- Application of Critical Success Factors and Medical Social Science support Global Public Health Systems
- The top five CSFs and top five Barriers to improving medical laboratories in developing countries were identified
- Medical laboratories constitute a new field of study with unique critical success factors

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