

EXECUTIVE SUMMARY

In recent years, debates over school reform have increasingly focused on the role of teacher unions in the changing landscape of American K-12 education. On one hand, critics argue that these unions, using their powerful grip on education politics and policy to great effect, bear primary responsibility for blocking states' efforts to put into place overdue reforms that will drive major-league gains in our educational system. Such critics contend that the unions generally succeed at preserving teacher job security and other interests, and do so at the expense of improved opportunities for kids.

On the other side, we find union defenders who stoutly maintain that these organizations are bulwarks of professionalism in education, that their power is greatly exaggerated, that their opposition to misguided reforms is warranted, and that they couldn't possibly account for achievement woes—considering that highly unionized states perform at least as well as any others (and better than many) on the National Assessment of Educational Progress (NAEP) and other indicators.

This debate has taken on an international aspect, too, as critics of U.S. reform initiatives (and defenders of unions) point out that teachers are unionized all over the world, including nearly all the countries that surpass us on comparative achievement measures such as the Trends in International Mathematics and Science

Study (TIMSS) and Programme for International Student Assessment (PISA).

Both sides agree that, for better or worse, teacher unions look out for teacher interests. This study sheds light on how they use politics to do this, by measuring teacher union strength, state by state, more comprehensively than any other study to date. It sought answers to three questions:

1. What elements are potential sources of a union's strength (i.e., inputs)?
2. How might unions wield power in terms of behavior and conduct (i.e., processes and activities)?
3. What are signs that they have gotten their way (i.e., outcomes)?

We do not limit the answers to those questions to routinely-studied channels of union strength such as membership density and bargaining status, though we do include those. We also include such other measures as alignment between state policies and traditional union interests, union contributions to political campaigns, and the impressions of union influence held by knowledgeable participant-observers within the states. We chose to focus on state-level unions rather than local ones, because the state organizations are apt to affect education policy on a large scale.

OUR APPROACH

To gauge union strength at the state level, we gathered and synthesized data for

thirty-seven different variables across five broad areas:

Area 1: Resources and Membership

Internal union resources (members and revenue), plus K-12 education spending in the state, including the portion of such spending devoted to teacher salaries and benefits.

Area 2: Involvement in Politics

Teacher unions' share of financial contributions to state candidates and political parties, and their representation at the Republican and Democratic national conventions.

Area 3: Scope of Bargaining

Bargaining status (mandatory, permitted, or prohibited), scope of bargaining, right of unions to deduct agency fees from non-members, and legality of teacher strikes.

Area 4: State Policies

Degree of alignment between teacher employment rules and charter school policies with traditional union interests.

Area 5: Perceived Influence

Results of an original survey of key stakeholders within each state, including how influential the unions are in comparison to other entities in the state, whether the positions of policymakers are aligned with those of teacher unions, and how effective the unions have been in stopping policies with which they disagree.

Using these data, we rank the relative strength of state-level teacher unions in fifty-one jurisdictions as compared to one another (fifty states plus Washington, D.C.). To do this, we score the state separately on each of the five areas and rank the states according to those scores. We then average the five area scores and re-rank the states accordingly.

RANKINGS

Table ES-1 displays the overall and area ranks of each state.

TABLE ES-1. TEACHER UNION STRENGTH BY STATE

State	Overall Rank	Area 1: Resources & Membership	Area 2: Involvement in Politics	Area 3: Scope of Bargaining	Area 4: State Policies	Area 5: Perceived Influence
Alabama	20	24*	1*	45*	18*	25
Alaska	15	13*	36*	4*	21*	36
Arizona	51	40*	49	45*	49*	48
Arkansas	48	50	47*	45*	20	37
California	6	20*	18*	1	37	1
Colorado	35	37*	18*	25	48	29
Connecticut	17	9*	29*	13	13	27
Delaware	19	9*	29*	15	36	18
District of Columbia	33	17	N/A	21	49*	41
Florida	50	47*	36*	35*	46*	50
Georgia	45	35*	36*	48*	26	45

<i>State</i>	<i>Overall Rank</i>	<i>Area 1: Resources & Membership</i>	<i>Area 2: Involvement in Politics</i>	<i>Area 3: Scope of Bargaining</i>	<i>Area 4: State Policies</i>	<i>Area 5: Perceived Influence</i>
Hawaii	1	3*	1*	9	9	23
Idaho	36	30	4*	42	45	42*
Illinois	8	18*	12	3	39	28
Indiana	31	9*	13*	39	44	32
Iowa	27	27	23*	32	11	31
Kansas	32	33*	18*	31	14	30
Kentucky	28	35*	26*	26	10	11*
Louisiana	42	40*	44*	24	33	44
Maine	22	20*	44*	16	7*	11*
Maryland	23	26	40*	20	16	4
Massachusetts	21	13*	40*	12	21*	16
Michigan	16	6*	4*	22	51	20
Minnesota	14	3*	32*	2	46*	19
Mississippi	46	49	40*	43*	7*	51
Missouri	38	33*	47*	23	40	24
Montana	3	20*	10*	6	6	5
Nebraska	26	18*	13*	37	27	38
Nevada	25	28*	18*	27	28	10
New Hampshire	30	24*	40*	14	17	40
New Jersey	7	1*	26*	17*	5	2
New Mexico	37	46	32*	35*	29	8
New York	9	1*	13*	19	24*	21
North Carolina	40	47*	29*	48*	12	11*
North Dakota	24	28*	23*	33*	2*	14
Ohio	12	20*	17	10	23	35
Oklahoma	43	44*	26*	40	43	46
Oregon	2	9*	8*	4*	34*	3
Pennsylvania	4	13*	10*	7	41	7
Rhode Island	5	6*	4*	17*	15	15
South Carolina	49	51	35	43*	38	47
South Dakota	34	40*	1*	33*	34*	49
Tennessee	41	37*	18*	38	42	42*
Texas	44	44*	36*	48*	30*	34
Utah	39	37*	25	28*	30*	39
Vermont	11	6*	44*	8	2*	22
Virginia	47	40*	50	48*	4	33
Washington	10	3*	32*	11	18*	9
West Virginia	13	31*	4*	28*	1	6
Wisconsin	18	13*	8*	41	24*	17
Wyoming	29	31*	13*	28*	30*	26

* Indicates that a state is tied with one or more other states for this rank.

TABLE ES-2. TEACHER UNION STRENGTH BY RANK AND TIER

Tier 1 Strongest		Tier 2 Strong		Tier 3 Average		Tier 4 Weak		Tier 5 Weakest	
STATE	OVERALL RANK	STATE	OVERALL RANK	STATE	OVERALL RANK	STATE	OVERALL RANK	STATE	OVERALL RANK
Hawaii	1	Vermont	11	Massachusetts	21	Kansas	32	Louisiana	42
Oregon	2	Ohio	12	Maine	22	District of Columbia	33	Oklahoma	43
Montana	3	West Virginia	13	Maryland	23	South Dakota	34	Texas	44
Pennsylvania	4	Minnesota	14	North Dakota	24	Colorado	35	Georgia	45
Rhode Island	5	Alaska	15	Nevada	25	Idaho	36	Mississippi	46
California	6	Michigan	16	Nebraska	26	New Mexico	37	Virginia	47
New Jersey	7	Connecticut	17	Iowa	27	Missouri	38	Arkansas	48
Illinois	8	Wisconsin	18	Kentucky	28	Utah	39	South Carolina	49
New York	9	Delaware	19	Wyoming	29	North Carolina	40	Florida	50
Washington	10	Alabama	20	New Hampshire	30	Tennessee	41	Arizona	51
				Indiana	31				

Note: With fifty-one total jurisdictions, each tier comprises ten except Tier 3—the middle tier—which comprises eleven.

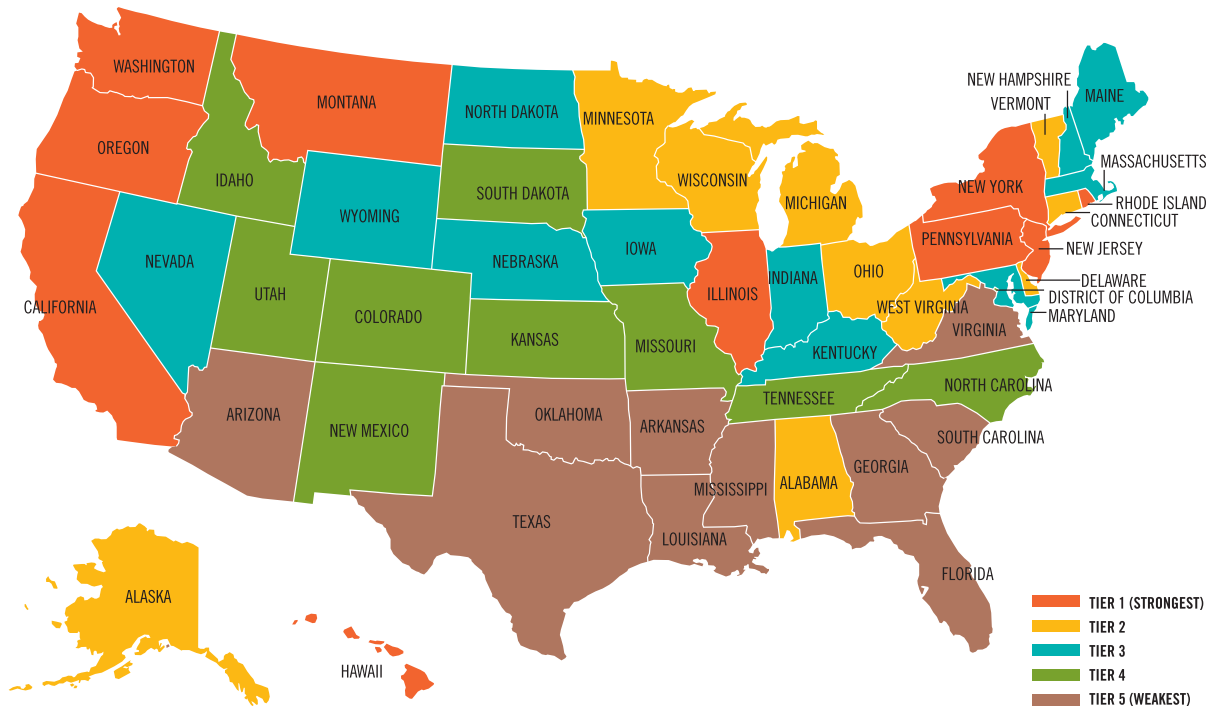
TABLE ES-3. TEACHER UNION STRENGTH BY RANK, TIER, BARGAINING STATUS, AND AGENCY FEES

Tier 1 Strongest		Tier 2 Strong		Tier 3 Average		Tier 4 Weak		Tier 5 Weakest	
STATE	OVERALL RANK	STATE	OVERALL RANK	STATE	OVERALL RANK	STATE	OVERALL RANK	STATE	OVERALL RANK
Hawaii	1	Vermont	11	Massachusetts	21	Kansas	32	Louisiana	42
Oregon	2	Ohio	12	Maine	22	District of Columbia	33	Oklahoma	43
Montana	3	West Virginia	13	Maryland	23	South Dakota	34	Texas	44
Pennsylvania	4	Minnesota	14	North Dakota	24	Colorado	35	Georgia	45
Rhode Island	5	Alaska	15	Nevada	25	Idaho	36	Mississippi	46
California	6	Michigan	16	Nebraska	26	New Mexico	37	Virginia	47
New Jersey	7	Connecticut	17	Iowa	27	Missouri	38	Arkansas	48
Illinois	8	Wisconsin	18	Kentucky	28	Utah	39	South Carolina	49
New York	9	Delaware	19	Wyoming	29	North Carolina	40	Florida	50
Washington	10	Alabama	20	New Hampshire	30	Tennessee	41	Arizona	51
				Indiana	31				

Note: With fifty-one total jurisdictions, each tier comprises ten except Tier 3—the middle tier—which comprises eleven.

MANDATORY BARGAINING PERMITTED BARGAINING PROHIBITED BARGAINING AGENCY FEES PROHIBITED

FIGURE ES-1. MAP OF TEACHER UNION STRENGTH BY TIER



We divided the fifty-one jurisdictions into five tiers, from strongest to weakest. Table ES-2 (page 11) shows the overall rank and tier for each state.

Many of the states whose teacher unions rank in the strongest tier—such as California, New Jersey, and Washington—are widely recognized for their powerful teacher unions. Likewise, in many of the weakest Tier 5 states, unions have suffered some major defeats (Louisiana and Arizona) or do not have much of a presence at all.

To be sure, bargaining status and agency fees help define—but not completely determine—the rankings (see Table ES-3, which adds these variables). Mandatory bargaining states are shaded in tan, permitted-bargaining states are shaded in green, and bargaining-prohibited states in yellow. Red text indicates that the state does not allow agency fees.

Most of the twenty strongest states (Tiers 1 and 2) require collective bargaining. But so does Florida (Tier 5), ranked next-to-last. Three of the twenty-strongest—Ohio, West Virginia, and Alabama—permit but do not require bargaining. Most of the twenty weakest states (Tiers 4 and 5) prohibit agency fees (red text), but three allow this practice (Washington, D.C., New Mexico, and Missouri). Nor do bargaining-prohibited states invariably land in the weakest tier; North Carolina, for instance, is in Tier 4.

GEOGRAPHY

Figure ES-1 maps states by tier. As is evident, there are strong regional associations. The West Coast and the Northeast have nearly all of the strongest unions in the nation (shaded light orange and red), while southern states have the weakest (in brown).

Obviously there is nothing inherent to geography that dictates union strength. But it is correlated with factors that do—the history of collective bargaining, the rhetoric of unionism, and overall political or ideological orientation. Places where unions have long been regarded as necessary and valuable parts of the economy and polity are more apt to mandate bargaining and to allow the collection of agency fees. Employees are also more likely to join unions themselves in areas with long-standing favorable attitudes toward organized labor. And in places that are ideologically liberal, voters are more prone to hold favorable views of unions and to elect Democrat leaders, who in turn tend to be more receptive to union interests.

The states with the strongest teacher unions (Tier 1, mapped in red) are in the Northeast and on the West Coast. All of these states have mandatory bargaining, allow agency fees, and have high membership rates. They are politically and ideologically liberal, and unions there rank highly in perceived influence. The Tier 2 states in light orange are mostly in the Midwest, which is also historically (and currently) pro-labor but politically more moderate. These states allow agency fees, and the unionization rate is high even though some permit rather than mandate bargaining. Unions there tend to be politically active, since elections and policy outcomes are less predictable than in the Tier 1 states.

In contrast, the western and central states are largely rural and politically conservative, with little history of unionism. They generally rank in Tiers 3 and 4 (blue and green). Many of them bar agency fees and have low unionization rates, even where bargaining is mandated. But unions there, as well as most in New England, benefit

from the value placed on local control over restrictive state mandates. As a result, the policy environment tends to be aligned with union interests because there aren't many statewide education policies as such. Finally, the South is home to the Tier 5 states with the weakest unions, mapped in brown. These jurisdictions are both ideologically conservative and historically anti-union. Here bargaining is either prohibited or permitted, but not mandatory; union membership is low, even where bargaining is allowed; and education policy is not aligned with union interests.

FOUR KEY TAKEAWAYS

1. **Mandatory bargaining appears to tilt the playing field in favor of stronger unions.** At the very least, it is a sufficient (though not an essential) condition by which unions are made strong. Where bargaining is optional or prohibited, unions tend to score “weaker” on our overall metric.
2. **Resources make a difference.** Dollars and members are both important. With higher revenue, a state union can not only better finance its lobbying and advocacy efforts, but also increase its capacity to support the activities of its local affiliates. Greater membership means more union representation at the ballot box, more letters and calls to state leaders, and more boots on the ground during rallies and campaigns—and in turn, more revenue from member dues.
3. **The scope of bargaining matters a lot, too, as does the right (or not) to strike.** Local unions can and do use collective bargaining to protect teacher interests, which can (among other things) result in iron-clad job protections for

ineffective teachers. When a wide scope of bargaining combines with ill-defined, timid, or absent state policies, local unions have more room to negotiate contracts that serve their goals. And local bargaining isn't the only way to secure teachers interests; sometimes such protections are written directly into state law.

4. **The fact that a state has mandatory, permissive, or broad bargaining laws—or its unions enjoy abundant resources—does not mean that state policies are union-favorable and vice-versa.** Many states in our top two tiers have education policies that are *not* particularly favorable to teacher unions. Conversely, states without strong collective bargaining rights nonetheless have union-friendly policies. That's because other factors matter, too, sometimes greatly—beginning with state leadership (both past and present), federal policy, the condition of the economy, the influence of other key stakeholders, and the state's own macro-politics.