

ILLINOIS

OVERALL RANK: 8TH¹
TIER 1 (STRONGEST)

STRONGER WEAKER

OVERALL	8				
1. RESOURCES AND MEMBERSHIP			18		
2. INVOLVEMENT IN POLITICS		12			
3. SCOPE OF BARGAINING	3				
4. STATE POLICIES					39
5. PERCEIVED INFLUENCE				28	

AREA 1: RESOURCES AND MEMBERSHIP TIED FOR 18TH

While the two state-level teacher unions in Illinois have high membership rates compared to other states, the union revenues and spending on K-12 education are both in the middle of the pack. Fully 96.2 percent of teachers in the Land of Lincoln belong to unions (8th-highest out of 51 jurisdictions). But the state’s NEA and AFT affiliates bring in just \$497 annually per teacher in the state (25th). Spending on K-12 education by the state is moderate, accounting for 18.7 percent of Illinois’s expenditures (29th). Education dollars from all sources (local, state, and federal) are moderate as well—\$11,229 per pupil annually (27th), with 53.1 percent of that money going toward teacher salaries and benefits (34th).

AREA 2: INVOLVEMENT IN POLITICS² 12TH

Teacher unions have been significant contributors to state political campaigns in Illinois over the past decade: Teacher-union donations to state candidates comprised 3.6 percent of all such donations, the largest proportion in the land.³ Of the money donated by the ten highest-giving sectors, teacher unions gave 18.2 percent (3rd). Unions focused their contributions on candidates as opposed to state political parties: a mere 0.6 percent of donations to parties in Illinois came from teacher unions (33rd). Finally, 14.2 percent of all delegates to the Democratic and Republican national conventions were teacher union members (23rd).⁴

AREA 3: SCOPE OF BARGAINING
3RD

Illinois is one of twenty-one states that both require collective bargaining and allow unions to automatically collect agency fees from non-member teachers, a key source of union revenue. The state also has one of the broadest scopes of bargaining in the nation—of the potential contract provisions examined in this metric, all twenty-one may be bargained. State law mandates that five be negotiated: wages, hours, terms and conditions of employment, class load, and extracurricular duties.⁵ The remaining sixteen provisions are either explicitly permitted (four items) or implicitly allowed because the state takes no position; and, as recently demonstrated by the Chicago Teachers Union, Illinois law permits teacher strikes.

AREA 4: STATE POLICIES
39TH

Many of Illinois's state policies do not align with traditional teacher union interests. The state specifies that teacher evaluations be significantly informed by student growth. Tenure is granted after four years (three years is the national norm) and the tenure decision must take student growth into consideration. Layoff decisions must take teacher performance into account rather than relying on seniority alone. Further, Illinois law allows new and virtual charter schools, as well as conversions of traditional public schools. Charters are not required to participate in collective bargaining agreements. A handful of policies, however, are more favorable to unions: The state does not support performance pay, and it places a cap on the number of charter schools allowed to operate. The paucity of

favorable policies may have encouraged union donations to state politics (Area 2), which more than doubled between 2004 and 2010.

AREA 5: PERCEIVED INFLUENCE
28TH

Stakeholders in Illinois perceive teacher unions to be an active—if not always effective—force in state politics. Survey respondents rank the union among the entities with the greatest influence on education policies, after the state school board. They report that Democrats often need teacher union support to be elected, and that state education leaders often align with union positions. But they note that education policies proposed by the governor and those enacted in the most recent legislative session were only somewhat in line with teacher union priorities.⁶ They also report that, in a time of recent budgetary constraints, teacher unions conceded from the outset that some reductions in pay and benefits were acceptable.

OVERALL
8TH

Illinois state teacher unions operate in a favorable collective bargaining environment and are very active in state-level politics. Yet despite these advantages, they do not have a particularly favorable policy environment, and their perceived effectiveness is moderate when compared with unions in other states.

In contrast to the political war waged in many neighboring states, Illinois state legislators, teacher unions, and the governor reached détente in Spring 2011. They jointly backed SB 7, a sweeping education-reform bill that considers teacher performance (not just seniority) in teacher pay, tenure, and dismissal; streamlines the dismissal process; and makes legal strikes more difficult.^{7,8} (The spirit of cooperation clearly didn't extend to Chicago, where implementing SB 7 was a major part of the September 2012 Chicago Teachers Union strike—the first strike in twenty-five years.⁹) Despite support for the bill, however, there has been a major hang-up to implementing it: dollars. “We keep [making aggressive reforms] for less and less money...and there's a breaking point,” warned State Superintendent Chris Koch.¹⁰

To avoid that financial cliff, in late 2011 Senate Democrats, along with Democrat Governor Pat Quinn, proposed a comprehensive plan to reform the state pension system. As of July 2012, the bill remained stalled in the legislature due to an unlikely meeting of the minds between labor unions and Republican representatives.^{11,12} Reacting to the requirement that local districts make up for state cuts, Dan Montgomery, president of the Illinois Federation of Teachers, railed that “there's no free choice here, but a coercive dilemma where a public servant must choose between harm on the one hand or more harm on the other.”¹³ Republican lawmakers agreed: The bill would force districts to raise property taxes or make cuts in the classroom, neither of which is palatable. Democrat Representative Elaine Nekritz countered that moving the burden away from the state was essential: “With this change, we can move away from being financial laughingstocks.” With the clock ticking down on the state's gravely underfunded pensions and lawmakers acting with no sense of urgency, time may make a fool of them all.

ILLINOIS RANKINGS BY AREA AND INDICATOR

OVERALL RANK: 8TH

Area and Rank ^a	General Indicator	Sub-Indicator	Sub-Indicator Rank/Status ^b
AREA 1: RESOURCES & MEMBERSHIP 18*	Membership	By rank, what percentage of public-school teachers in the state are union members?	8th
	Revenue	By rank, what is the total yearly revenue (per teacher in the state) of the state-level NEA and/ or AFT affiliate(s)?	25th
	Spending on education	By rank, what percentage of state expenditures (of state general funds, state restricted funds, state bonds, and federal "pass-through" funds) is directed to K-12 education?	29th
		By rank, what is the total annual per-pupil expenditure (of funds from federal, state, and local sources) in the state?	27th
		By rank, what percentage of total annual per-pupil expenditures is directed to teacher salaries and benefits?	34th
AREA 2: INVOLVEMENT IN POLITICS 12	Contributions to candidates and political parties	By rank, what percentage of the total contributions to state candidates was donated by teacher unions?	1st
		By rank, what percentage of the total contributions to state-level political parties was donated by teacher unions?	33rd
	Industry influence	By rank, what percent of the contributions to state candidates from the ten highest-giving sectors was donated by teacher unions?	3rd
	Status of delegates	By rank, what percentage of the state's delegates to the Democratic and Republican conventions were members of teacher unions?	23rd
AREA 3: SCOPE OF BARGAINING 3	Legal scope of bargaining	What is the legal status of collective bargaining?	Mandatory
		By rank, how broad is the scope of collective bargaining?	7th
	Automatic revenue streams	What is the unions' legal right to automatically collect agency fees from non-members and/or collect member dues via automatic payroll deductions?	Permitted
	Right to strike	What is the legal status of teacher strikes?	Permitted
AREA 4: STATE POLICIES 39	Performance pay	Does the state support performance pay for teachers?	State does not support
	Retirement	By rank, what is the employer- versus employee-contribution rate to the teacher pension system?	23rd
	Evaluations	What is the maximum potential consequence for veteran teachers who receive unsatisfactory evaluation(s)?	Eligible for dismissal
		Is classroom effectiveness included in teacher evaluations? If so, how is it weighted?	Required; Significantly informs evaluation
	Terms of employment	How long before a teacher earns tenure?	Four years
		Is student/teacher performance considered in tenure decisions? If so, how is it weighted?	Required; Included as one of multiple criteria
		Is seniority considered in teacher layoff decisions? If so, how is it weighted?	Optional; May be considered among other factors
		Is teacher performance included in teacher layoff decisions? If so, how is it weighted?	Required; Considered among other factors
		By rank, what percentage of the teaching workforce was dismissed due to poor performance?	32nd
	Class size	Is class size restricted for grades 1-3? If so, is the restriction higher or lower than the national average (20)?	Yes; Higher

Area and Rank	General Indicator	Sub-Indicator	Sub-Indicator Rank/Status
AREA 4: STATE POLICIES 39 (cont.)	Charter school structural limitations	Is there a cap (limit) placed on the number of charter schools that can operate in the state (or other jurisdiction) and/or on the number of students who can attend charter schools?	State cap with some room for growth
		Does the state allow a variety of charter schools: start-ups, conversions, and virtual schools?	Yes
		How many charter authorizing options exist? How active are those authorizers?	Two or more w/ limited jurisdiction
	Charter school exemptions	Are all charter schools automatically exempt from state laws and state/district regulations (except those that safeguard students and fiscal accountability)? If not, are they eligible for exemptions?	Yes
		Are all charter schools automatically exempt from state teacher-certification requirements? If not, are they eligible for exemptions?	No; Schools can apply for exemptions
		Are all charter schools automatically exempt from collective bargaining agreements (CBAs)? If not, are they eligible for exemptions?	Yes

AREA 5: PERCEIVED INFLUENCE^c 28	Relative influence of teacher unions	How do you rank the influence of teacher unions on education policy compared with other influential entities?	Second- or third-most influential
	Influence over campaigns	On a scale from always to never, how often do Democratic candidates need teacher-union support to get elected?	Often/Always
		On a scale from always to never, how often do Republican candidates need teacher-union support to get elected?	Sometimes
	Influence over spending	To what extent, from strongly agree to strongly disagree, do you agree that even in times of cutbacks, teacher unions are effective in protecting dollars for education?	Neutral
		Given recent budgetary constraints, would you say that teacher unions generally make concessions to prevent reductions in pay and benefits or fight hard to prevent those reductions?	Generally concede
	Influence over policy	To what extent, from strongly agree to strongly disagree, do you agree that teacher unions ward off proposals in your state with which they disagree?	Agree
		On a scale from always to never, how often do existing state education policies reflect teacher-union priorities?	Sometimes/ Often
		To what extent, from totally in line to not at all in line, were state education policies proposed by the governor during your state's latest legislative session in line with teacher-union priorities?	Mostly not in line/ Somewhat in line
		To what extent, from totally in line to not at all in line, were legislative outcomes of your state's latest legislative session in line with teacher-union priorities?	Somewhat/ Mostly in line
	Influence over key stakeholders	On a scale from always to never, how often have the priorities of state education leaders aligned with teacher-union positions in the past three years?	Sometimes/ Often
Would you say that teacher unions typically compromise with policymakers to ensure that their preferred policies are enacted, or typically need not make concessions?		Generally compromise	

* Tied with another state

^a Area ranks are calculated using a weighted average of sub-indicators. For a more detailed description, see Appendix A.

^b Where possible, we report a state's rank as compared to other states on a given metric. For example, out of 51 states, Illinois has the 8th-highest percentage of teachers who are union members. Otherwise, we report a status: Illinois has mandatory collective bargaining, and union agency fees are permitted. For a more detailed description of our metrics and methodology, see Appendix A. To request the raw data for your state, send an email to uniondata@edexcellence.net.

^c For all survey questions, stakeholders were asked specifically about teacher unions, candidates, policies, and leaders in their state. In addition, we asked about unions and policies in the "current legislative session," but because legislative calendars vary from state to state, responses refer to policies proposed and enacted within the 2010-11 window.

ENDNOTES

¹ A state's overall rank is calculated as follows: First, we score it on multiple sub-indicators (sub-indicator data and scores for Illinois are shown in the table, *Illinois Rankings by Area and Indicator*). Second, we take a weighted average of the sub-indicators in each of five areas. In each area, we use that average to place the states in rank order: For example, in Area 1: Resources and Membership, Illinois is ranked 18th of 51 based on the weighted average of its sub-indicators. To generate the state's overall rank, we average the five area ranks together, then re-order the states. For a more detailed description of data sources and methodology, see Appendix A.

² Readers should note that these figures include only direct donations from unions and union-connected PACs, but not their spending on electioneering/advertising, mobilizing the union's own membership, lobbying, or advocacy. A recent *Wall Street Journal* report found that donations and lobbying activities account for a small share of union political spending compared with their expenditures on member mobilization and advocacy. Even the AFT agreed, making the argument that since its mission is organizing and activism, it will naturally spend significant amounts on these activities. Thus, the percentages we report here are extremely conservative representations of what unions actually spend on politics. For more information, see Appendix A, Area 2; Tom McGinty and Brody Mullins, "Political Spending by Unions Far Exceeds Direct Donations," *Wall Street Journal*, July 10, 2012; and Jeff Hauser, "Wall Street Journal Compares Union Political Spending to Corporate Donations," AFL-CIO, July 10, 2012.

³ While our overall metric reports the strength of state teacher unions, this area also captures contributions to state campaigns and parties from national unions and local union affiliates. Typically, the total contributions from each are much smaller than the donations from the state unions. But in Illinois's case, a local union (the AFT-affiliated Chicago Teachers Union) gave almost as much as the state unions did.

⁴ At the time of publication, the 2000 conventions were the most recent for which such detailed data were available in forms that met rigorous standards. However, 2008 data provided by the Democratic National Convention were highly correlated with the reliable figures from 2000.

⁵ Illinois Senate Bill 7, passed June 2011, stipulates that hours are a permissive rather than mandatory subject in districts that serve cities with a population greater than 500,000 people (in other words, Chicago). In such cases, district leaders can decide whether to negotiate or impose the length of the work and school day/year. See Note 9, below, for more.

⁶ We asked stakeholders about unions and policies in the "current legislative session," but because legislative calendars vary from state to state, responses refer to policies proposed and enacted within the 2010-11 window.

⁷ Ellen Alberding, "Illinois: The New Leader In Education Reform," *Chicago Tribune*, June 13, 2011, http://articles.chicagotribune.com/2011-06-13/news/ct-oped-0613-reform-20110613_1_piece-of-education-legislation-teachers-kimberly-lightford.

⁸ Illinois Senate Bill 7, accessed July 23, 2012, <http://www.ilga.gov/legislation/97/SB/09700SB0007sam001.htm>.

⁹ The Chicago strike touched on many of the contentious issues in education reform: merit pay (and teacher pay more generally), evaluations, and length of school day. The conflict began in July 2012 when an arbitrator ruled that while the city could lengthen the school day, it could not demand teachers work more hours without additional compensation. However, both union and management rejected the plan laid out by the ruling, and talks stalled through the summer, resulting in a seven-day strike at the start of the school year in September. The agreement that eventually ended the walkout does maintain Mayor Rahm Emanuel's stated primary goals: Students now have a longer school day and principals kept their right to decide which teachers to hire. But the settlement's other provisions reflect the union's goals, perhaps because Democratic leadership—including the well-connected Emanuel—was concerned about the strike's effect on the presidential election. The agreement does not contain merit pay; gives teachers across-the-board raises of 3 percent, 2 percent, and 2 percent over the next three years; sets the portion of evaluations based on student growth at 30 percent, nearly at the minimum level of 25 percent required by state law; leaves teacher work hours untouched while requiring the city to hire additional teachers to cover the lengthened school day; and ensures that half of all new district hires are teachers who were laid off in 2010 due to budget constraints. As of publication, details of the new contract were being finalized, after which it must be approved by rank-and-file union members. But it appears safe to say that the CTU got most of what it wanted. See "Chicago Teachers Strike: Union, Emanuel Disagree On Bottom Line," *HuffingtonPost.com*, September 9, 2012, http://www.huffingtonpost.com/2012/09/10/chicago-teachers-school-b_n_1869477.html; "Chicago Teachers Agree To End Strike, Classes To Resume Wednesday," *NBC News*, September 18, 2012, http://usnews.nbcnews.com/_news/2012/09/18/13938248-chicago-teachers-agree-to-end-strike-classes-to-resume-wednesday?lite.

¹⁰ Ray Long, "Education Reforms Underfunded, Illinois School Chief Warns," *Chicago Tribune*, July 18, 2011, http://articles.chicagotribune.com/2011-07-18/news/ct-met-education-reform-funding-20110718_1_evaluations-teacher-performance-education-reforms.

¹¹ "Schools Predict Local Burdens From Pension Plan," *Illinois Daily Herald*, May 30, 2012, <http://www.dailyherald.com/article/20120530/news/705309938/>.

¹² Associated Press, "Illinois Governor Hints At Calling Legislative Session Next Month Over Pensions," *Chicago Tribune*, July 18, 2012, <http://www.chicagotribune.com/news/local/sns-ap-il--illinois-pensions-quinn-20120718,0,5084344.story>.

¹³ Dave McKinney and Andrew Maloney, "Unions: Pension Bill Forces Choice 'Between Harm... Or More Harm,'" *Chicago Sun-Times*, May 29, 2012, <http://www.suntimes.com/news/cityhall/12844079-418/unions-pension-changes-force-choice-between-harm-or-more-harm.html>.