

OREGON

OVERALL RANK: 2ND¹
TIER 1 (STRONGEST)

STRONGER
←
→
 WEAKER

OVERALL	2				
1. RESOURCES AND MEMBERSHIP		9			
2. INVOLVEMENT IN POLITICS		8			
3. SCOPE OF BARGAINING	4				
4. STATE POLICIES				34	
5. PERCEIVED INFLUENCE	3				

AREA 1: RESOURCES AND MEMBERSHIP TIED FOR 9TH

While Oregon’s state teacher unions benefit from substantial internal resources from their members, they and their members do not see generous spending on education overall. A high percentage of teachers in the Beaver State—95.2 percent of them—belong to unions (the 10th-highest unionization rate of 51 jurisdictions). The NEA and AFT state affiliates bring in the second-largest annual revenues, a very substantial \$984 for each teacher in the state. The state does not contribute much of its own budget (12.8 percent) to K-12 education (46th), and while total spending (from state, federal, and local sources) is in the middle of the national pack at \$10,517 per pupil per year (32nd), just 52.2 percent of those dollars go to teacher salaries and budgets (40th).

AREA 2: INVOLVEMENT IN POLITICS² TIED FOR 8TH

Teacher unions have been highly active in Oregon politics over the past decade. Of the total donations to candidates for state office, 3 percent came from the unions; only in Illinois did candidates receive a higher percentage from unions. Contributions from unions accounted for 15.3 percent of the donations to candidates from the ten highest-giving sectors in the state (8th). Unions also gave to the state’s political parties, although not quite as heavily—1.2 percent of party donations in Oregon came from teacher unions (21st). Finally, 18.1 percent of Oregon delegates to the Democratic and Republican national conventions were teacher union members, ranking the state 12th.³

*AREA 3: SCOPE OF BARGAINING
TIED FOR 4TH*

Oregon bargaining laws are more permissive and union-friendly than in nearly every other state. The state requires collective bargaining, allows unions to automatically collect agency fees from non-member teachers (a key source of union-revenue), and permits teacher strikes. The state also has a broad scope of bargaining: Of twenty-one items examined in this analysis, Oregon explicitly requires or permits ten to be included in bargaining (wages, hours, terms and conditions of employment, grievance procedures, insurance benefits, pension/retirement benefits, fringe benefits, leave, curriculum, and extracurricular duties). State law is silent on another seven provisions, implicitly opening them for bargaining, and prohibits only four (evaluation process/instruments, length of the school year, class load, and class size).

*AREA 4: STATE POLICIES
TIED FOR 34TH*

Oregon's teacher employment policies are relatively in line with traditional union interests: Oregon does not require that teacher evaluations or tenure decisions include student achievement data, nor does it mandate that layoff decisions take teacher performance into account. Employers contribute 1.7 times more to pensions than teachers do, a higher proportion than in many other states. However, while unions usually favor limiting charter schools, Oregon law encourages them. The state does not cap the number of such schools, which may be virtual schools, new charters, or conversions. All charters are automatically exempt from most state and district laws and regulations, and they are not required to participate in district collective bargaining agreements.

*AREA 5: PERCEIVED INFLUENCE
3RD*

Oregon stakeholders identify teacher unions as very strong. Respondents rank them as one of the two most influential entities on education policy (along with education advocacy organizations), and note that they are effective in protecting dollars for education and warding off education proposals with which they disagree. According to stakeholders, between 2009 and 2011 the position of state education leaders *always* aligned with those of the teacher union, and Democrats often needed teacher union support to get elected. But while stakeholders report that state-level education policies often reflect teacher union priorities, the outcomes of the latest legislative session were mostly *not* in line with those priorities—indicating that the unions may be facing more opposition than they have in the past (see sidebar).⁴

*OVERALL
2ND*

Oregon's teacher unions have substantial internal resources, are active donors to politicians and parties, and enjoy highly favorable bargaining rules. But other state policies (especially related to charter schools) do not align with traditional union interests. Still, stakeholders report that they are a strong force in the state.

What a difference two years makes. In 2010, the Oregon Education Association (OEA) enthusiastically endorsed Democrat John Kitzhaber's run for governor.⁵ His election looked to be a boon for the already-strong OEA: Teacher unions had consistently had a powerful presence with Oregon's lawmakers, and the 2011 legislative session was shaping up to be no exception. As in years past, the unions gave generously to Democratic candidates and already counted many legislators as allies.⁶

But something went awry. Only 13 of 31 bills that the state union supported passed in 2011; moreover, 11 of the 37 measures they opposed actually passed.⁷ Worse, the OEA saw former allies turn into foes. Kitzhaber endorsed GOP-sponsored laws to increase parental choice and expand charter schools in return for Republican support on measures that would increase his financial oversight and decision-making authority over education.⁸ Even Democratic legislators were no longer sure bets: In its traditional end-of-session report card, the OEA gave Fs to 8 Democrats (and 40 Republicans) out of 90 legislators. No senator, Democrat or Republican, earned higher than a C.⁹

With Oregon's 2012 assembly session open for business, it is unclear how lawmakers will react to the OEA's report card. Representative Matt Wingard, the author of last year's Republican education bills, thinks the report card undermines the union's position: "It hurts their credibility."¹⁰ (That said, Wingard later had some credibility issues of his own.¹¹) Currently, Oregon teacher unions are among the strongest in the nation. But with potentially damaged credibility, and evidence from other states that lawmakers' sentiments are turning against union interests, it remains to be seen whether 2011 was a blemish on a strong record or indicative of things to come.

OREGON RANKINGS BY AREA AND INDICATOR

OVERALL RANK: 2ND

Area and Rank ^a	General Indicator	Sub-Indicator	Sub-Indicator Rank/Status ^b
AREA 1: RESOURCES & MEMBERSHIP 9*	Membership	By rank, what percentage of public-school teachers in the state are union members?	10th
	Revenue	By rank, what is the total yearly revenue (per teacher in the state) of the state-level NEA and/or AFT affiliate(s)?	2nd
	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?	46th
		By rank, what is the total annual per-pupil expenditure (of funds from federal, state, and local sources) in the state?	32nd
		By rank, what percentage of total annual per-pupil expenditures is directed to teacher salaries and benefits?	40th
AREA 2: INVOLVEMENT IN POLITICS 8*	Contributions to candidates and political parties	By rank, what percentage of the total contributions to state candidates was donated by teacher unions?	2nd
		By rank, what percentage of the total contributions to state-level political parties was donated by teacher unions?	21st
	Industry influence	By rank, what percent of the contributions to state candidates from the ten highest-giving sectors was donated by teacher unions?	8th
	Status of delegates	By rank, what percentage of the state's delegates to the Democratic and Republican conventions were members of teacher unions?	12th
AREA 3: SCOPE OF BARGAINING 4*	Legal scope of bargaining	What is the legal status of collective bargaining?	Mandatory
		By rank, how broad is the scope of collective bargaining?	10th*
	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 34*	Performance pay	Does the state support performance pay for teachers?	State supports/encourages
	Retirement	By rank, what is the employer- versus employee-contribution rate to the teacher pension system?	13th
	Evaluations	What is the maximum potential consequence for veteran teachers who receive unsatisfactory evaluation(s)?	Teacher improvement plan
		Is classroom effectiveness included in teacher evaluations? If so, how is it weighted?	Not required
	Terms of employment	How long before a teacher earns tenure?	Three years
		Is student/teacher performance considered in tenure decisions? If so, how is it weighted?	Not included
		Is seniority considered in teacher layoff decisions? If so, how is it weighted?	Required; Considered among other factors
		Is teacher performance included in teacher layoff decisions? If so, how is it weighted?	Not required
	Class size	By rank, what percentage of the teaching workforce was dismissed due to poor performance?	13th
Is class size restricted for grades 1-3? If so, is the restriction higher or lower than the national average (20)?		No restriction	

Area and Rank	General Indicator	Sub-Indicator	Sub-Indicator Rank/Status
AREA 4: STATE POLICIES 34 (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?	No state cap
		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?	Single option; Some activity
	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?	Partially; All schools receive automatic exemptions for some teachers
		Are all charter schools automatically exempt from collective bargaining agreements (CBAs)? If not, are they eligible for exemptions?	Yes

AREA 5: PERCEIVED INFLUENCE^c 3	Relative influence of teacher unions	How do you rank the influence of teacher unions on education policy compared with other influential entities?	Most- or second-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
		On a scale from always to never, how often do Republican candidates need teacher-union support to get elected?	Rarely/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?	Agree
		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?	Fight
	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?	Mostly not in line/ Somewhat 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?	Always
		Would you say that teacher unions typically compromise with policymakers to ensure that their preferred policies are enacted, or typically need not make concessions?	Does not concede

* 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, Oregon has the 10th-highest percentage of teachers who are union members. Otherwise, we report a status: Oregon 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 Oregon are shown in the table, *Oregon 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, Oregon is 9th 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 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.

⁴ 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.

⁵ OEA Leader Letter, "OEA-PIE Recommends Kitzhaber For Governor," Oregon Education Association, accessed July 17, 2012, <http://www.oregoned.org/site/apps/nlnet/content2.aspx?c=9dKKKYMDH&b=5186993&ct=8519601>.

⁶ Jeff Mapes, "Oregon Teachers Union Hands Out Harsh Grades, Even To Longtime Legislative Allies," *Oregonian*, August 18, 2011, http://blog.oregonlive.com/mapesonpolitics/2011/08/oregon_teachers_union_hands_ou.html.

⁷ 2011 Legislative Summary, Oregon Education Association, accessed July 18, 2012, http://www.oregoned.org/atf/ct/%7B3F7AF7EC-F984-4631-A411-148CD1FB8421%7D/2011_OEA_legislative_summary.pdf.

⁸ Mapes.

⁹ 2011 Legislative Summary.

¹⁰ Mapes.

¹¹ Jeff Mapes, "Matt Wingard Leaves Oregon House Leadership Post After Allegations of Misconduct," *Oregonian*, June 13, 2012, http://www.oregonlive.com/politics/index.ssf/2012/06/matt_wingard_leaves_oregon_hou.html.