

PENNSYLVANIA

OVERALL RANK: 4TH¹
TIER 1 (STRONGEST)

STRONGER —————> WEAKER

OVERALL	4				
1. RESOURCES AND MEMBERSHIP		13			
2. INVOLVEMENT IN POLITICS		10			
3. SCOPE OF BARGAINING	7				
4. STATE POLICIES				41	
5. PERCEIVED INFLUENCE	7				

AREA 1: RESOURCES AND MEMBERSHIP TIED FOR 13TH

Pennsylvania’s teacher unions benefit from relatively high membership, ample resources, and generous public education funding. The Keystone State has the 12th-highest rate of teacher union membership in the nation (93.4 percent). In addition, its state-level NEA and AFT affiliates bring in the 19th-highest annual revenue, at \$538 per teacher. Funding for K-12 education in Pennsylvania is also substantial with 19.6 percent of state expenditures going toward K-12 education (24th). Per-pupil spending, a combination of local, state, and federal funds amounts to \$12,906 per year (14th).

AREA 2: INVOLVEMENT IN POLITICS² TIED FOR 10TH

For at least the last ten years, teacher unions have been quite active in Pennsylvania state politics. Union donations made up 1.5 percent of the total contributions to candidates for state office (10th-highest among states). Their contributions also accounted for 7.4 percent of direct donations from the ten highest-giving sectors in Pennsylvania (19th). The teacher unions prioritized giving to candidates rather than parties, however, giving the latter just 0.04 percent of total monies received (less than everywhere but Alaska). Further, a full 20.0 percent of Pennsylvania delegates to the Democratic and Republican national conventions identified as members of teacher unions—a proportion ranking 10th-largest nationwide.³

*AREA 3: SCOPE OF BARGAINING
7TH*

Pennsylvania is one of thirty-two states that require collective bargaining for public school teachers, and one of twenty-five that permit the automatic collection of agency fees from all such teachers (a key source of union revenue). The state also allows for a relatively broad scope of bargaining: Of twenty-one items examined in this metric, Pennsylvania law explicitly requires or permits four as subjects of bargaining: wages, hours, terms and conditions of employment, and management rights. Its laws are silent on the remaining seventeen items, implicitly permitting them all. Pennsylvania also permits teachers to strike.

*AREA 4: STATE POLICIES
41ST*

While a handful of Pennsylvania policies are aligned with traditional teacher union interests, many others, particularly those bearing on charter schools, are not. Relative to those that unions traditionally support: The state does not require that student achievement factor into teacher evaluations, nor does it require that districts consider teacher performance when determining layoffs. Further, Pennsylvania dismisses a smaller percentage of teachers due to poor performance than all but two other states. Yet many other policies do not parallel traditional union interests: The Keystone State's charter school law does not cap charter growth (although some districts have restrictions), provides automatic exemptions for charters from many state and district laws and regulations, and does not require that charters participate in district collective bargaining agreements. Further, the state does not limit K-3 class sizes.

*AREA 5: PERCEIVED INFLUENCE
7TH*

Stakeholders perceive teacher unions in Pennsylvania to be quite strong, unanimously rating them as the most influential entity in the state on matters of education policy. They also strongly agree that unions are effective in warding off education proposals with which they disagree and that, in a time of budgetary constraints, they fought hard to protect dollars for education. Further, they indicate that Democrats seeking office almost always need union support to be elected. Still, stakeholders note that, despite the unions' past successes, education policies proposed by the governor in the latest legislative session were mostly *not in line* with their priorities.⁴

*OVERALL
4TH*

Pennsylvania's teacher unions enjoy broad financial resources and membership, are highly involved in politics, and wield considerable influence at the state level. The state's NEA and AFT affiliates are some of the most powerful in the nation.

A recent survey of Pennsylvania districts concluded that school finances will descend from “difficult” to “desperate” in 2012-13—prompting cuts “unheard of since the Great Depression.”⁵ District leaders are not simply being fatalistic: On top of austerity cuts, the districts’ share of employee pension obligations will reportedly rise by 45 percent this year. When Governor Tom Corbett asked local unions to take a one-year salary freeze to lighten the fiscal load, James Testerman, the president of the Pennsylvania State Education Association, encouraged members to “seriously consider” the request.⁶ But they didn’t take the bait. In fact, one survey found that just 140 of the state’s 500 school districts froze employee pay in 2011-12—and freezes included teachers in just 83 districts.⁷ Teachers did not escape completely unscathed, however, as districts enacted other cuts (including layoffs) and state leaders are calling for even more belt-tightening in the years ahead.⁸

Pennsylvania’s teacher unions have had diminishing success in fending off school choice in its various forms, and state laws are relatively charter-friendly. In addition, in June 2012 the governor signed a new educational tax credit program into law while also bolstering the state’s existing system. AFT Pennsylvania calls the programs, which give tax credits to businesses that contribute to private school scholarship funds, “stealth vouchers” for kids in low-performing schools.⁹ Governor Corbett made vouchers his top priority coming into office in January 2011, and so far has triumphed over union objections.¹⁰ Still, given the unions’ record of success in staving off other reforms that threaten their members’ pay and job security, it could be that vouchers will be Corbett’s only victory.

PENNSYLVANIA RANKINGS BY AREA AND INDICATOR

OVERALL RANK: 4TH

<i>Area and Rank^a</i>	<i>General Indicator</i>	<i>Sub-Indicator</i>	<i>Sub-Indicator Rank/Status^b</i>
AREA 1: RESOURCES & MEMBERSHIP 13*	Membership	By rank, what percentage of public-school teachers in the state are union members?	12th
	Revenue	By rank, what is the total yearly revenue (per teacher in the state) of the state-level NEA and/or AFT affiliate(s)?	19th
	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?	24th*
		By rank, what is the total annual per-pupil expenditure (of funds from federal, state, and local sources) in the state?	14th
		By rank, what percentage of total annual per-pupil expenditures is directed to teacher salaries and benefits?	30th
AREA 2: INVOLVEMENT IN POLITICS 10*	Contributions to candidates and political parties	By rank, what percentage of the total contributions to state candidates was donated by teacher unions?	10th
		By rank, what percentage of the total contributions to state-level political parties was donated by teacher unions?	49th
	Industry influence	By rank, what percent of the contributions to state candidates from the ten highest-giving sectors was donated by teacher unions?	19th
	Status of delegates	By rank, what percentage of the state's delegates to the Democratic and Republican conventions were members of teacher unions?	10th
AREA 3: SCOPE OF BARGAINING 7	Legal scope of bargaining	What is the legal status of collective bargaining?	Mandatory
		By rank, how broad is the scope of collective bargaining?	20th*
	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 41	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?	48th
	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?	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; Sole factor
		Is teacher performance included in teacher layoff decisions? If so, how is it weighted?	Not required
		By rank, what percentage of the teaching workforce was dismissed due to poor performance?	3rd
Class size	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 41 (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 (but authorizers are capped)
		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 7	Relative influence of teacher unions	How do you rank the influence of teacher unions on education policy compared with other influential entities?	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?	Rarely
	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?	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?	Strongly 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?	Not at all/Mostly not 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?	**
	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?	**
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 generally concede	

* Tied with another state

** Insufficient number of responses to this particular question

^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, Pennsylvania has the 12th-highest percentage of teachers who are union members. Otherwise, we report a status: Pennsylvania 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 Pennsylvania are shown in the table, *Pennsylvania 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, Pennsylvania is ranked 13th 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 Associated Press, "Pa. School Groups' Survey Sees Grimmer Finances," *Sentinel*, May 22, 2012, http://cumberlink.com/news/local/state-and-regional/pa-school-groups-survey-sees-grimmer-finances/article_baacda5e-a41e-11e1-bb89-0019bb2963f4.html.

⁶ Tony Rhodin, "PA Teachers Union Urges Members To 'Seriously Consider' Wage Freeze," *Express-Times*, March 16, 2011, http://www.lehighvalleylive.com/breaking-news/index.ssf/2011/03/jim_testerman_head_of_pennsylv.html.

⁷ Charles Thompson, "In Pennsylvania, Most Teachers Rejected Gov. Corbett's Urging Of Pay Freezes In Face Of Budget Cuts," *Patriot News*, September 5, 2011, http://www.pennlive.com/midstate/index.ssf/2011/09/in_pennsylvania_most_teachers.html.

⁸ "PSEA President Responds To Governor's Call For A One-Year Pay Freeze," Pennsylvania State Education Association, March 16, 2011, <http://www.psea.org/general.aspx?id=7903>.

⁹ "Governor Signs \$27.7m Budget; Flat Funding, New Teacher Evaluation, Stealth Vouchers," AFT Pennsylvania, accessed July 11, 2012, <http://pa.aft.org/index.cfm?action=article&articleID=e6ec35b0-f50b-4b23-b816-7b0bcae3138b>.

¹⁰ "Governor Corbett Cites School Vouchers As Priority For Fall Legislative Session," *CBS Philadelphia*, September 19, 2011, <http://philadelphia.cbslocal.com/2011/09/19/governor-corbett-cites-school-vouchers-as-priority-for-fall-legislative-session/>.