PUBLIC SCHOOLS: TEACHER UNIONS, PRODUCTIVITY, AND REFORM


In explaining the failed merger between the National Education Association and the American Federation of Teachers, Bastian describes a conflict between the new progressive reformers and old guard adversarial factions which exist in both the NEA and AFT. This split, she says, left each union without a well-formed power base and ultimately turned the potential merger into a battle-ground where each faction sought control. She argues that to survive the union must reform by making a commitment to investing in the success of the school system. In another article in the same issue ("Educational reform and the merger that wasn't: an alternative view,"") pp. 33-37), Tom Mooney, while agreeing with Bastian about the dynamic of the failed merger, provides additional insight into the problems each faction had with the proposed governance structure. He also presents an alternative picture of the future of union reform.


The conservative literature suggests that unions drive opposition to school reform efforts such as layoffs or legislative changes in teaching standards, working conditions, and tenure rights. The findings of this study suggest a different picture. Duplantis surveyed school districts with over 10,000 students in eleven states without collective bargaining legislation. He identifies three issues key to teacher interest in joining a union: wages, job security, and desire for voice in administrative decisions. These concerns are greater in districts without collective bargaining agreements and increase when change occurs. It might be concluded that educational reform efforts can cause teachers to look for representation and may increase the strength of unions or at minimum require union involvement to succeed.


In the debate over whether unionization has helped or hurt public education, this key study evaluates the achievement gains of individual students in union versus

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** Items on this list should be ordered directly from the publisher or obtained through your library. Addresses and prices are given only for monographs and documents in print. For references to earlier works on teacher unions, please see Selected References, No. 133: Collective Bargaining in the Public Schools. January, 1967.
non-union districts. The authors use micro-level data from the Sustaining Effects Survey sponsored by the U.S. Department of Education in the late 1970s. The data includes math scores from a pretest-posttest given to fourth graders, as well as personal data collected for each student and resource data for each school. Overall findings indicate that school districts with collective bargaining are on average 3% more productive than non-union. Just as significant, Eberts and Stone detect a distinct difference in the type of student being helped: performance outcomes for average students in union districts improved by 7%, but for students significantly above or below average union districts show the opposite outcome. In a more recent study based on individual SAT/ACT scores, Charles A. Register and Paul W. Grimes measure a 4.7% improvement. Of note, the authors control for selectivity bias inherent in using SAT scores. Their article, "Collective bargaining, teachers, and student achievement" appears in *Journal of Labor Research*, Spring, 1991, pp. 99-109.


Do teachers unions create a rent-seeking effect that merely increases salaries and district spending or do they represent an efficient voice, which results in productivity gains? In a longitudinal study using data for three decades from the 1970s through the 1990s, Hoxby tests whether school districts that unionize ultimately have better student achievement levels than those that don't. She uses the dropout rate as a measure of student achievement (which weights to lower achieving students). She accounts for district demographics and school inputs and uses a difference-in-differences method to account for unobservable variables. Her findings show that rather than contributing to the productivity of education, unions have a rent-seeking effect that raised salaries and expenditures without a concurrent improvement in the dropout rate.


The authors believe that successful educational reform requires both schools and unions to change. Laying groundwork with nine case studies from those undertaken by Claremont Project VISION, Kerchner and Koppich propose a new role for unions. The school districts highlighted have switched to a collaborative rather than adversarial approach to management relations. Readers gain insight into how this new approach changes management and the teachers' professional status. For many functions, districts decentralize the decision-making and budgeting process to the school level and begin including teachers. Teachers also take on peer review and conflict management. Concurrent with these shifts in authority and changing ideas of labor relations are inevitable anxieties and friction while a new working relationship is gradually established. For a tested approach to site-based management in public schools, see Barry and Richard Rubin's "A heuristic model of collaboration within labor-management relations," *Journal of Collective Negotiations in the Public Sector*, 1997, pp. 185-201.

Does setting a standard for professional licensure ensure high quality teachers? Kleiner and Petree compare state professional licensing to collective bargaining as methods for improving student performance and teacher pay. Using state-level data for the period 1972-82, they examine educational outputs by two measures, SAT/ACT scores and dropout rates. They find that licensing does not impact pay and has a mixed effect on educational outputs. Unionism shows a positive relationship with educational outputs, but the relationship varies based on union strength. Unionism is also associated with higher student/teacher ratios, which in turn are associated with lower test scores. With licensing the results are reversed. Yet, unionism is found to improve test scores, whereas licensing does not. Results of a phone poll suggest and answer to the contradiction. Administrators are likely to relax licensing standards in response to market need for teachers, which might affect quality of teachers and consequently educational outputs.


In this early study, the author tests three possible explanations for falling SAT scores during the 1970s: the changing social environment, the level of money spent on education, and the growth in teacher unions. SAT scores are chosen as an indicator of what Kurth terms "excellence in education" or the ability of the best students to excel. He distinguishes between excellence in education and "quality of education" which would be a measure of the general caliber of teaching. Using aggregate state-level SAT scores, Kurth calculates the percent change over a ten-year period (1972/73 to 1982/83). The resulting numbers clearly connect declining SAT scores to teachers unions. However, the methodology and subsequent findings of this well-known study have been strongly contested. For example, F. Howard Nelson and Jewell C. Gould criticized Kurth's findings after performing their own calculations on his data. Their results are available in "Teachers' unions and excellence in education: comment." *Journal of Labor Research*, Fall, 1988, pp. 379-87. Kurth replies to this criticism in the same issue of *JLR*: "Teachers' unions and excellence in education: reply," pp. 389-394.


Lieberman, an advocate of limiting union power, combines a lifetime of experience with research on teachers unions in this presentation of ideas on bargaining, school choice, restructuring, vouchers and other reform issues. At the core of his views is a basic opposition to collective bargaining, which he sees as inefficient and an obstacle to democracy and reform in public education. In support of his argument, he provides extensive background information on union finances and politics as well as on state collective bargaining laws. Ultimately Lieberman describes an alternative scenario, which includes a switch to local teacher unions.


In this comprehensive overview, noted researchers in the field present their estimation of the issues and research that define the relationship between
teachers unions and educational reform. The authors provide a balanced view and avoid portraying unions as the answer to or the cause of problems in public education. Topics covered include reform bargaining, collective bargaining, professional licensing, Milwaukee public schools, school choice, defensive politics, educational research, international comparison, and refocusing on quality.


This recent district-level study measures monopsony and other market forces in Texas public schools where collective bargaining does not determine teachers' salaries. Merrifield theorizes that if teachers were employed by individual schools rather than by school districts, competition would increase and consequently drive salaries up. Using data from the 1989-90 school year and then establishing a 25-mile relevant market area for each district, the author calculates potential salary, taking into account ability to pay, teacher experience, and willingness to be taxed. While he finds that salaries would increase $1,341 on average, monopsony is not the key factor in salary structure. Rather, ability to pay and experience play the decisive roles. Monopsony does play a bigger role in large multi-district urban counties and the salary rise is greater in urban districts. The question of concurrent increases in student achievement is not studied.


Using both the 1994 NAEP fourth-grade reading test scores for public schools and 1995 SAT scores for public and private schools, this study finds that students have higher test scores in states with high rates of unionization (over 90%). The factors that relate to lower scores are low household income, race, large class size, high absenteeism, and higher rates of private school attendance.


Building on earlier research that linked unionized school districts with improved student achievement, Zigarelli constructs and tests a model of specific causal factors. Those include student socioeconomic status, educational inputs (class size, teacher quality, etc.), management involvement in curriculum development, bargaining gains, and funding levels. Data is derived from the High School and Beyond and the Administrator and Teacher Survey data sets collected by the U.S. Department of Education. Ultimately, no individual set of moderators fully explains the relationship. However, Zigarelli's findings suggest that two changes resulting from unionization create the impetus for achievement gains: better management oversight of classroom practices and increased (nonsalary) educational funding.