Seeing the Forest Instead of the Trees

Nuance needed when studying teachers unions

Special Interest: Teachers Unions and America's Public Schools

by Terry M. Moe

Brookings Institution Press, 2011, $34.95; 513 pages.

Reviewed by Jeffrey R. Henig

Some 10 years in the making, this book comes at such a propitious time that one might wonder whether author Terry Moe held it waiting for this moment to arrive. For years Professor Moe has been pointing out the teachers unions' tendency to use what he considers to be their vastly disproportionate powers to benefit their members at the expense of schoolchildren. Now, with Republican governors like Scott Walker in Wisconsin and John Kasich in Ohio publicly taking on collective bargaining for public school teachers, replacing strict salary schedules with merit pay, and introducing value-added measures into decisions about salaries and tenure, events have caught up to his message. It seems Moe's time has come.

When someone has been as prominently identified with an issue and a perspective as Terry Moe has been vis-à-vis teachers unions, potential readers might be prone to shrug off the announcement of a new book, assuming they know what's inside. Let me dispose of that concern first. Whether you agree with its key themes or not—and I do not—this is an important book and one well worth reading.

Those familiar with Moe's other books, journal articles, and various opinion pieces will recognize the trademarks: a strong dose of institutional theory, original empirical analysis, crisp writing, and sharp thinking. They'll find a central argument that has not changed and some data they've seen before, but enriched by more historical context, new data, and a comprehensive view on unions not previously available from Moe and rarely approached by others.

Perhaps the distinguishing element of Moe's perspective, one I find alternately appealing and exasperating, is his unrelenting refusal to let what he sees as trees distract from what he sees as forest. Moe understands that we live in a multicausal world and that serious efforts to disentangle "all the myriad, inter-related factors" that affect schools "would inevitably conclude with something like 'it's complicated.'" But "this isn't very enlightening," and so he sees his role to be one of filtering out less important considerations. "The task is not to capture everything of any relevance. It is to get to the heart of the matter."

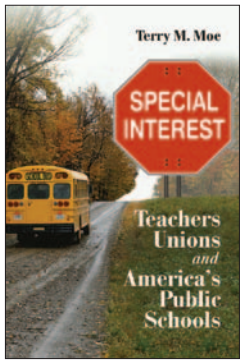
Despite this mission to simplify, Moe is too intellectually honest to hide all the complexities, and as a result there is much in the book that tugs against its central themes. The strongly critical view of unions that prevails when Moe steps back to look at the forest lives in tension with the more complex, nuanced, and interesting picture that emerges when he allows himself to step in amongst the trees.

Let me be clear here. Moe is neither contradicting himself nor softening his view. Rather, he's wrestling with two anomalies. First, even the data and analysis that he compiles himself provide a cloudier image than do his theory and policy stance. Second, the obvious facts that teachers unions are being powerfully challenged, often defeated, and led to pragmatic and tactical compromise work against the air of crisis and indignation that Moe still wants to cultivate.

Moe's institutional theories lead him to account for the power and behavior of political actors by zeroing in on laws and the incentives they create. In his historical narrative, the game changers are mid-20th-century laws about collective-bargaining rights and mandatory dues: "The key to the spectacular growth of public sector unions is that the laws changed. And what the laws did was to make union organizing and collective bargaining much easier, largely by setting up legal frameworks that allowed for elements of coercion." If laws are indeed responsible for the creation of union power, the policy message for reducing union power would seem straightforward: one only need undo the offending laws. Yet, when he turns to the data, Moe's own analyses show that union membership is high in states without pro-union laws, and that teacher support for unions is high whether or not they are legally forced into paying dues. "It seems to be a mistake, then, to think that somehow the great majority of teachers are forced to join the union because the laws push them into it." When existing research, "warts and all," does not converge on his expectation that collective bargaining lowers achievement, he writes that off to how difficult it is to empirically disentangle complex causal chains and reasserts his faith that "whether the exact effects of collective bargaining on achievement can be well estimated or not, rules that keep bad teachers in the classrooms are still bad for kids." In an appendix, Moe presents a regression analysis that apparently confirms his expectation that state laws mandating union fees affect membership levels. But when his probit analysis, which he

admits is more appropriate, does not produce the same results, his "inclination is to think that…the probit results are off track and misleading."

Moe's indignation about what he sees as union arrogance and his frustration with progress that is slower than he would like force him to downplay evidence that non-union forces have gained the upper hand in many arenas where education policies are shaped. He does not deny that unions are losing battles at all levels of government. Chapter 7 discusses New Orleans, New York City, and Washington, D.C. (at least while Michelle Rhee was in charge) as places where unions have had to acquiesce to reforms they initially opposed, but tellingly titles the chapter "*Small* Victories for Sanity" [emphasis added]. He chronicles the expansion of charters despite union opposition, but insists that when considering this "modicum of progress," that "it is important to recognize, as a political baseline, that the union's ideal—if they can get it—is to have no charter schools at all, with the possible exception of unionized charter schools." He notes the prominent role of the Gates, Broad, Walton, and other foundations that decidedly do not toe the union line, but insists that they are only "at the periphery of power." And while concluding that the union's days of dominance are numbered, he emphasizes that this is only due to the confluence of "fantastically powerful" forces, a "lining up of the stars," and an "accident of history." The redeeming forces are the Obama-Duncan team and the unfolding effects of education technologies that will weaken the central power of labor. Lest reformers get complacent, he urges them on: "Just consider this sobering question: '*What if Hillary Clinton had been elected president?*'" [emphasis in the original]… because "it easily could have happened." And he tempers his story about the healing powers of technology by noting that its full impact is "many years down the road."



Important as this book may be, I'm left to conclude that the timing may be off in the end. The growing muscle of non-union forces, the more pragmatic stances of progressive union leaders (whether sincerely felt or tactically adopted), and roughly 25 years of education reform that has gone against the traditional union vein leave Professor Moe sounding a bit like a tardy Paul Revere, sounding the cry that "the British are coming" when it is not redcoats in formation that he is hearing but the drumbeat around the wedding of Kate and William. Teachers unions retain considerable power, to be sure, and for this reason I think they necessarily must be drawn in to the reform movement if it is to make a serious and lasting mark. But unions are just one among several key players these days, and there are whiffs of anachronism around this larger-than-life portrait of their dominant role.

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