



Story Lab – Spending by Teachers’ Unions

Teachers’ unions can be powerful forces – in addition to contract negotiations, the unions can have an impact on school board decisions on everything from zoning changes to classroom technology purchases to budget cuts. But in many cases the greatest influence of unions – specifically, where they choose to spend their money – happens behind the scenes. The Hechinger Report and GothamSchools teamed up to take a closer look at the changing role of teachers’ unions, and what activities are being funded by their members’ dues. The following suggestions come from the project’s editorial team, and EWA Public Editor Emily Richmond.

1. Follow the money

Federal law requires labor organizations to submit a document known as an LM-2, which covers both political expenditures and lobbying. (See the supplemental page for the steps to finding and using the LM-2.) Questions the documents can help you answer include: Which union officials are spending most of their time on political activities? What percentage of the union’s spending is going to personnel (such as lobbyists) compared with events or mailers? Keep in mind that a union might categorize contributions to the same organization under two different headers. A community group might be the recipient of both a “grant” to support its outreach programs as well as a separate political contribution. You can dig deeper into the numbers using campaign finance and lobbyist records.

2. Keep it in context

Financial documents are just numbers – it takes context to extract something newsworthy, said Philissa Cramer, editor of GothamSchools. “In most cases you aren’t going to see anything earth-shattering,” she explained. “You should see tools to help your understanding and your reporting.” The documents may list expenditures that you’ve already reported on, such as mailers that went out during a contentious bond measure campaign. Sarah Butrymowicz of The Hechinger Report said both of the project’s on political spending and lobbying – http://hechingerreport.org/content/unions-lobby-power-remains-unmatched_11399/ and http://hechingerreport.org/content/unions-wield-much-power-in-elections-but-can-still-lose_11551/ – centered around specific examples. Those details included candidates the unions supported, bills they had lobbied for, and how they used their members to lobby for public support. The numbers provided the backbone of the stories, but concrete examples did the best job of illustrating union strength.

3. Limit the scope

It’s easy to get overwhelmed by a wealth of financial data. Setting a specific time period to examine – the most recent fiscal year or the past two legislative sessions, for example

– will help you focus your efforts. Be careful jumping to conclusions about changes between years. Sarah Darville, writing for GothamSchools, found significant swings in the New York City teachers’ union’s annual expenditures, but the reason turned out to be that a loan payment that had come due rather than new spending. “They weren’t running around buying office chairs,” Darville said. “It’s important to find out what’s behind the numbers and not just focus on the change.”

4. Know the players

Lobbyists are required to register, typically with the secretary of state’s office. They must identify their clients, as well as the specific pieces of legislation they are tracking. This is a good place to start to find out who else might be watching key education bills other than the “usual suspects.” Lobbyists can also be valuable sources – they’re up to date on the key education legislation and they typically know – often well ahead of the official votes – which way individual lawmakers are leaning.

Two organizations, StudentsFirst and Democrats For Education Reform (DFER), are the probably next-most involved groups in education issues after the unions, and they know the landscape well. It’s a good idea to get familiar with their activities and leadership at the local and state level. In that same vein, campaign managers during election season can be important sources – particularly those working for the candidates the union opposes.

5. Check your math

Your story’s accuracy depends on it. “You need a second set of eyes,” says Sarah Butrymowicz of The Hechinger Report. If you do come across something unfamiliar – ask. The unions want your story to be accurate and fair; they have an incentive to be helpful. Don’t hesitate to ask them to explain expenditures to provide additional documentation.

Stories to Steal

- **Who’s the Competition?** Teachers’ unions typically play a big role in who gets elected to school boards. One reason is that the races are often held in off years from the national and state elections, and therefore draw a smaller pool of voters. If a union mobilizes behind a particular candidate, it can make a big difference. At the same time, national advocacy groups like Stand for Children and StudentsFirst are becoming increasingly active at the state and local levels, particularly in big districts that are being watched on the national stage. How does their political activity compare to the local unions? Many of those reform-oriented groups focus their efforts on a few key issues, which means they are significantly outspending unions in areas such as promoting “parent trigger” laws or tougher accountability standards for teachers. How is that changing the conversation?
- **The Foot Soldiers:** The unions’ top officers get the spotlight, but much of the labor groups’ day-to-day work is carried out by its school-site leaders. Talk to the union shop stewards at different schools – and different grade levels – to get a

sense of what's on the minds of teachers. How much of their time is spent on service? How many grievances are filed on a weekly, monthly, and annual basis? Are the bulk of their events focused on political activities or professional development?

- **I'm Just a Bill:** Go behind the scenes to tell the story of one recent bill or election to illustrate union power. How much did they spend? How (and how many of their members) did they organize? Who did they go up against? All of these elements can be put in the broader context of union political involvement to showcase how strong a local or state teachers union is.

Moving Forward ... Why Unions matter

Given the enormous challenges facing their members, teachers' unions are under significant pressure and ripe for reporting. It's important to remember they typically represent retirees as well as active teachers. But keep in mind they aren't the unions representing education employees, and the organizations representing support employees and administrators bear watching, as well.