



Chapter 1. Theories of Power and Change in Educator Unions: Situating the Emergence of Solidarity Unionism

Fear was the first pressing concern that compounded the low morale in the months and years prior to the 2018 statewide strike, according to Brianne Solomon, a fine arts teacher from Mason County, West Virginia: “My school and my county had even lower morale than what I considered the state’s average of low morale, so we were lower than low. People were afraid and that showed itself in defensiveness, standoffish behavior, refusal to comment, and tension.” In 1990, teachers in West Virginia had staged what was then the largest statewide strike in West Virginia history. Forty-seven of the fifty-five counties had gone on strike demanding better wages, new salary scales to reward years of education, and a fiscal solution to the state’s health insurance budget crisis. Led by WVEA’s president at the time, Kayetta Meadows, teachers won a resounding victory. They forced the legislature to institute a \$5,000 wage increase, spread across three years, bringing up the average state teacher’s salary comparable to contiguous states. The legislature committed new revenue to address the \$2 billion budget hole in the state’s insurance plan and committed to reducing wait time on insurance claims. New salary scales were adopted to enable educators to pursue graduate education (Mochaidean).

The 1990 strike was not without consequences. In the capital county, Kanawha, several teachers were arrested for attempting to stop buses from driving through picket lines. One teacher was run over by an irate parent dropping her children off at school (Mochaidean). Teachers received letters from their superintendents informing them that they would be fired if they continued to walk picket lines. The average loss in salary for those who went on strike in 1990 was \$660 (Bradley). Solomon said, “In the beginning, we were not sure if we’d be supported [in 2018] and the people who lived through the 1990 strike were fearful because they knew how bad things could get between coworkers and superiors.”

Yet, as Solomon recounted, so far, nothing had worked in the decades since to stem the tide of austerity. “We tried reaching out to lawmakers. We voiced opinions and concerns about the growing number of policies that we saw as attacks on public school teachers and public education. We knew we were getting lip service.” At times, both the WVEA and AFT- WV called for limited actions to be taken beyond lobbying lawmakers for better benefits. Blue flus, sick outs, and rolling walkouts were all either considered or acted upon in past years. During Governor Joe Manchin’s tenure in the mid-2000s, WVEA even organized a one-day walkout that brought with it a few thousand dollars in wage increases spread over three years (Silver).

A decade later, West Virginia remained ranked forty-eighth in the nation for teacher salaries and school funding continued to decline. “I don’t think it’s been a secret that teacher morale in West Virginia is at an all-time low,” Solomon explained. “It has been for quite some time. I think when you’re as deficient in morale as we were, you know it’s bad, but you don’t know how bad it is.”

The strike is the most powerful tool available to educators and all workers. As Solomon recounted, the 2018 strike emerged after decades of continued disinvestment scraping away at the achievements of the 1990 strike. The afterlife of that strike remained tangible for many who lived through it: lost wages, precarious public support, arrests, verbal abuse, and even physical violence in some cases. In 2018, decades of smaller actions and electoral advocacy had not yielded much. Educators did not want to go on strike. It appeared to be the only remaining option.

School funding, wages, and benefits are not the only reasons that teachers and staff were dissatisfied with their work. In the years since the 1990s strikes in West Virginia and elsewhere, educators’ curricular autonomy has drastically decreased with high stakes standardized testing and curriculum mandates, while class sizes have tended to increase (Bartell et al.). The sharp decline in overall public education funding has intensified educators’ work, forcing them to engage in grant writing and crowd-sourced resource drives for classroom materials (Del Valle); to attempt to address the absence of sufficient systemic resources to provide equitable education to students with disabilities and emergent multilingual students (Litvinov and Flannery); and to become expert learners in ever-new classroom technologies, mandated curricula, and grading systems (Weiner, “Heads Up! Chins Down!”). In Oklahoma, emergency certifications, which require no prior teacher education or teaching experience, have exponentially increased to more than three thousand annually in just a few years as traditionally certified teachers leave to find living wage jobs and administrators scramble to fill empty positions (Eger). As their own, their families’, and their students’ lives become increasingly challenging under late-stage capitalism, the notion that success in education leads to upward social mobility and economic prosperity seemed more and more a cruel myth.

In higher and lower education, these challenges are experienced with relative intensity across job classes. We use the term “educator” holistically to encompass classroom teachers, paraprofessionals or assistant teachers, food service staff, building caretakers, school health workers, school counselors, and all other support staff. We do so to formally recognize the educative and relational work involved in these positions. As one Oklahoma bus driver said to Erin,

I started buying dollar boxes of granola bars and just handing it to them because my kids were hungry. And this is me making sixteen thousand a year driving this bus. I’m feeding my kids because they’re hungry. Because they’re my kids on that bus. You know? . . . If the people are taken care of, then they’re taking care of the kids, then the kids are gonna

see that. Then they're gonna mimic that when they grow up. I mean a lot of the folks do it because they love the children—regardless of the pay, regardless of being frozen [on buses without heaters], regardless of whatever else.

Education workers in non-licensed support staff positions are often more diverse than majority White women teachers along the lines of race, language, and class yet often occupy the most precarious positions. Unionized support staff tend to bargain under separate contracts and are often either marginalized by teachers' union chapters or relatively ignored. In many places, paraprofessional positions have expanded to accommodate increased class sizes and reduce overall wage expenditures in practice. The 2022 joint strike by Minneapolis teachers and education support professionals (ESPs) in their respective chapters of the Minneapolis Federation of Teachers, and school food service workers organized with the Service Employees International Union Local 284 illuminates the necessity for organizing across job classes. The nearly three-week strike won significant increases in wages, most substantially for ESPs, who were majority educators of color. Demands were articulated as part of a broader movement for racial justice intimately linked to the police murders of George Floyd and beloved former Minneapolis Public Schools' food service worker, Philando Castile (Jaffe).

Like the Oklahoma bus driver feeding and warming her children each morning, education workers across lower and higher education continue to absorb the brunt of austerity in schools and society, with marginalized, precarious, and low-waged workers experiencing the most dehumanizing conditions. In response to the Minneapolis teachers and support staff strike, Paul Cantrell pointedly writes: "District admin is talking about these negotiations in terms of avoiding debt, cuts, bankruptcy. But the truth is the district is already deeply, deeply in debt. It's just that they've hidden that debt off the balance sheets by making it human debt. . . . Running the schools at the cost of educators' [and students'] health, well-being, and mental stability is a form of debt."

We begin the chapter by offering a framework for understanding the historical development of in-tension educator unionisms—business (sometimes called service), professionalist, solidarity, and social movement unionisms. These unionisms, or theory-practices of union organizing within the education industry, entail specific and situated histories of education labor struggles and modes of relating among and across hierarchies of race, gender, class positions and more. These histories and modes of relating offer important insights for understanding the recent resurgence in educator labor militancy and organizing to transform our unions, schools, and society. In the second half of the chapter, we analyze the lead-up to the strikes, engaging the legacies of these differences in ways of thinking and practicing unionism as a mode of analysis. We narrate how and why solidarity unionism, or rank-and-file organizing within and beyond the limits and exclusions of business union structures and state labor laws, emerged as a key approach that made the mass actions possible.

● Unionisms: Business, Solidarity, Professionalist, and Social Movement Approaches

Often, debates in certain traditions of scholarship (i.e., labor economics, political science), can refer to teachers' unions as one generally homogenous, ahistorical entity. From an economics or labor management perspective, teachers' unions are commonly framed as rent-seekers "looking to gain from their involvement in public education through increases in salaries and enhanced working conditions" (Cowen and Strunk 210). The body of research with and for educators' labor organization is much smaller and marginalized within the academy and often quite inaccessible for those without access to university library resources. Few educator preparation programs provide pre-service or in-service educators with opportunities to learn about unions (what they are, how they operate, how to participate). Often, as with most of our interviews, educators learn in and through struggle, through intergenerational relationships with union family members or mentors, and/or through social movement participation (Maton and Stark). Scholars of social justice or movement unionism argue that political education, or "the teaching and learning processes that compel individuals to reflect on the nature of power and its connections to the range of forces shaping both individuals and institutions" (Maton and Stark 2), is central to growing these movements and formulating more effective union practice (Brown and Stern; Morrison; Riley).

Historically and today, in-tension perspectives on the nature of power have always comprised K-12 and higher education unions and union movements. These iteratively inform structures of union decision-making (whether they are more horizontalist or verticalist), who can be a union member or active participant (e.g., the role of education support professionals, adjuncts, and non-teaching staff in guiding the union's priorities), the political purposes of the union, their aspirations for transforming the education system, and the kinds of action unions might take to realize these aspirations. The recent resurgence in union militancy and democratization (Dyke et al., "Introduction") certainly illuminates increased disaffection with highly centralized unions or those narrowly focused on building power via electoral lobbying. Electoralism, in its extreme, locates power with legislators and government representatives. Educators and educator unions' aim to steer this power through working to elect and build relationships of mutual interest with people who can pass public education-friendly laws. Alternatively, militancy, or direct action, locates power within workers themselves. Their collective action and refusal to continue on with business-as-usual serves as a point of pressure to see the conditions of their work improved and to enact broader legislative and policy transformation. The strength and quality of union militancy and union democratization are intimately intertwined with one another. In the context of the education industry, militancy and union democratization are animated by long-standing, intersecting histories of racism and gender and sexual oppression within union organizations and movements, and

likewise, histories of resistance and movement-building for increased worker power and the just and liberatory transformation of schools and society.

To read and understand the in-tension unionisms that emerged in and through the spring 2018 strikes, we first engage a longer, deeper history of educator unionism in the US. By understanding these histories and traditions of theory-practice in educator union organizing, we can better make sense of resurgent militancy in our contemporary moment and its challenges.

● (White) Professionalization

It is a bit of a stretch on our part to consider movements toward (White) professionalization alongside other unionisms, as its traditions of understanding power and change are often opposed to unionization. Marjorie Murphy writes, “The ideology of professionalism in education grew into a powerful antiunion slogan that effectively paralyzed and then slowed the unionization of teachers” (1). It was not until the 1960s that many teachers’ unions won the right to collectively bargain. Yet, professionalism is one distinct set of multi-faceted traditions for understanding how educators work together to improve teaching and education.

To be clear, many unionists, including social movement unionists, articulate professional dignity and respect for teachers’ pedagogical expertise as a core part of contemporary educator movements. Such calls for dignity, trust, and autonomy can exist within educator movements that acknowledge and attend to the class, race, and/or gender hierarchies within the education system. Historically southern Black educator associations are an important example of this (see D’Amico Pawlewicz and View; Hale, “The Development of Power”; V. S. Walker; and attended to in more depth in Chapter Two). We are after a different sort of call to professionalism. Our use of the term (White) professionalization refers primarily to a movement within education to seek for teachers’ inclusion and status within the professional class, and to improve the quality and rigor of education through advocacy and cooperation with the state and capital. Diana D’Amico Pawlewicz and Jenice View write, “[p]rofessional occupations gain stature and authority because they know something that their clients do not: the more abstract and esoteric the knowledge, the more social and economic authority for the professional group” (1280-1281). Whereas other unionisms within education are rooted in the structural divisions between the employing and employee classes, professionalism, as a way of thinking, rejects such a structural understanding. Professionalism imagines teachers, staff, administrators, contingent and tenure track researchers and educators—all who work in education as, to put it simply, on the same team with the same or similar interests (our students) while masking their unequal relations of power and decision-making authority.

One of the main ways we can understand this approach is through the historical evolution of the NEA, the national union of which the major state teachers’ associations in West Virginia, Kentucky, Oklahoma, and Arizona are affiliated. We lean heavily on two important and expansive histories, Urban’s history

of the NEA and Marjorie Murphy's history of the AFT and NEA, which centers the AFT. Founded in 1857 as a professional association by, primarily, administrators and university researchers (mainly men), the association aimed to further the profession of teaching, and to advocate for influence over its increasing centralization in the form of teacher credentialing and accreditation. During its early meetings, White women teachers were disallowed from speaking or participating in the association's proceedings (M. Murphy 4). Women fought for the right to speak and were able to organize within the association to promote their interests in the early twentieth century. At the time, women desired for the association to address their interests more directly, namely, academic freedom, better and equal pay to men, the ability to marry, have a family, and continue teaching (most married and pregnant women were fired), and to have more autonomy over their lives outside of school (often contracts included requirements about when and with whom women teachers could socialize). It is important to note here that the NEA was segregated up until the 1950s, and so women's interests in the organization were decidedly rooted in the interests of White women, specifically.

Women began making some gains within the NEA, even electing a woman president in 1910 (Urban 13). In 1920, male central leadership in the organization pushed a reorganization that would shift the NEA from an assembly-style process to a representative process, with state associations wielding more power. Despite halting the reorganization for a couple of years, women-led interest groups in the NEA saw their participation and influence decline significantly (Urban 14).

In the mid-twentieth century, the NEA turned towards building strong state associations and locals through a top-down, "soft" approach to negotiations. Historically, mostly women teachers had little power within their state or the national association. Although teacher strikes occurred in 1946, 1947, and 1948, the NEA adopted a no-strike clause in all their contracts and refused to endorse them to build cooperation between teachers and administrators (Urban 177). Urban explains:

As long as the associations had to serve both teachers and school superintendents, and as long as administrators had the ear of the NEA hierarchy, independent teacher initiatives, no matter how successful, were ignored. Just as problematic as the NEA's commitment to teachers and to local teachers' associations in the 1940s was its commitment to the equity concerns of women and minority teachers. (106)

Superintendents continued to have significant control of the leadership and direction of the organization until the teacher uprisings of the 1960s.

At this time, the NEA took a hard stance discouraging its members from the rising communist, socialist, and radical progressivist movements in education research and practice (M. Murphy). Instead, it pushed a professionalist theory of change that suggested teachers, school administration, superintendents, and

university faculty must work together to lobby for educational changes in the best interest of all children. Urban recounts that the NEA's (at least nominal) commitment to gender pay equality served to bolster women's support of the organization in relation to the (also) male-dominated AFT, a trade union that rejected the notion that administrators and teachers maintained the same class interests. It is important to note here that during this time, the AFT also swiftly subjugated radical political factions within its organization, even colluding with McCarthy-era government witch hunts (Feffer), contributing to its leadership remaining staunchly White, male, and top-heavy (M. Murphy).

It wasn't until the late 1960s and early 1970s that teachers' union movements had begun to seriously challenge professionalist discourses that the NEA clung to in favor of direct action. Within the NEA, smaller groups of teachers organized within the association to push its transformation to a trade union despite that "the state associations often acted to block, delay, or dilute the various changes proposed by teacher militants for the NEA" at their annual representative assembly (Urban 191). In 1968, the Florida Education Association, an NEA-affiliate, took part in the country's first statewide teacher strike, setting the tone for the association's 1973 re-constitution.

Urban notes that, since the Reagan era and until recently, the NEA has returned to its earlier traditions of professionalist discourses, articulating the purpose of educational change along the lines of what is best "for the children" as a rhetorical device to minimize the relationship between educators' working conditions and students' learning conditions. The non-confrontational lure of (White) professionalism aligned with the dispositions required by neoliberalism, namely, self-sacrifice for the good of the profession.

● Business Unionism

Within education labor studies and activism, Lois Weiner has studied and articulated the mode of unionism that dominates established unions in education and in the wider world of organized labor: business unionism. A strong proponent of members' democratic participation in their unions, she suggests such participation is at odds with the predominating "service model" or "business unionism" approach taken by most teachers' unions (and trade unions, in general). For Weiner, in this model:

[T]he union is run like a business and exists to provide services including lower rates for auto insurance; benefits from a welfare fund; pension advice; contract negotiations; and perhaps filing a grievance. Officers or staff make decisions on the members' behalf. The union as an organization functions based on the assumption (generally unarticulated, unless it's challenged) that paid officials know best about everything. . . . Exclusionary ways of operating that are accepted out of what seems like necessity morph into principles. ("The Future of Our Schools" 33-34)

Despite the predominance of business unionism, education labor scholars have illuminated the ways in which educators have attempted to transform their unions and take up social liberation aims via the formation of social justice caucuses. Rhiannon Maton and Lauren Ware Stark describe caucuses as,

meso-level organizational forms that exist both within and apart from their broader unions. At times they are formally recognized by their broader union as a “caucus” or group of unionists sharing a specific set of values and agenda, and at other times they operate without formal union recognition while still using this title. Their membership tends to consist of a range of constituents, including progressives seeking radical systemic and structural change, unionists disgruntled with traditional conciliatory union politics, and classroom educators seeking support in the development and advancement of social justice curriculum, pedagogy and politics within and beyond the classroom (Stark, 2019). Caucuses tend to have greater flexibility to work beyond traditional union venues such as district negotiations, and frequently strive to develop deep partnerships with local community groups and constituents. (5)

Via caucuses, rank-and-file members can mobilize their own theories and practices of power and change and organize together to encourage (or pressure) union leadership to distribute resources in ways that support those theories and aims (Stark; Stern et al.).

It is not merely an unfortunate development that the service or business model predominates within established teachers’ unions. The infrastructure and organization of business unions arose through battles between workers to exert more control over their own labor power and the state and capital, which sought (continues to seek) to do the same. The genesis of contemporary business unions was a direct result of cataclysmic strikes that had occurred in the US during the pre-World War I era. Typically, in this era, when workers struck, employers would shore up their side with armed guards to force strikers back to work, disrupt pickets, or protect scabs when they crossed the picket line (S. Smith). For example, in the Homestead Strike of 1892, a collection of more than six thousand unionized steel workers clashed with three hundred agents of the Pinkerton Detective Agency, who had been ferried up the Ohio River and begun firing upon the strikers on the shore (S. Smith). In 1894, more than two dozen workers died after the National Guard teamed up with private security forces hired by the Pullman Company to break the nationwide rail workers’ strike effort. After the Ludlow Massacre of 1914 and the Battle of Blair Mountain in 1921, where more than twenty-five people (including eleven children) and around one hundred people were killed, respectively, the state began to formally mediate labor-capital relations via the passage of labor laws (Roediger and Esch; S. Smith).

With precursors in the 1926 Railway Act (Wilner), eventually, the passage of the National Labor Relations Act of 1935, also known as the Wagner Act, provided government-protected union activity in the workplace, including the right to

collective bargaining and the right to engage in a strike if certain conditions had not been met by the employer. Though the Wagner Act provided a legal framework through which unions could negotiate, it had the effect of shifting unions' focus from militant action to win change and toward building central administrative structures that could negotiate contracts and hold employers to legal account (Brecher). Eventually, as organized labor's relationship with Democrats waned, the Taft-Hartley Act of 1947 amended the Wagner Act and prohibitions on certain labor actions were introduced. No longer could workers legally engage in solidarity strikes, wildcat strikes, or secondary boycotts, to name a few. Since then, labor law has become increasingly hostile to union organizing (Brecher). The latest example, the U.S. Supreme Court's 2018 ruling in *Janus v. AFSCME*, limits unions' ability to recruit members and collect dues.

Restrictive labor law and the power it provides employers has significantly contributed to the centrality of the service or business model of unionism (Tait 6-7). While business unions, in education and other industries, structurally deter rank-and-file membership participation, that has never stopped educators and other unionists from organizing, either within their formal unions and against such business union models (e.g., CORE in CTU) or in organizations that seek to build power beyond the structural limits of trade or business unions altogether. In Vanessa Tait's study of poor workers' movements, efforts on the part of predominantly BIPOC and immigrant worker communities within precarious service, domestic, and childcare labor spheres to address often racist, nativist exploitation were born of necessity after exclusion from and marginalization by predominantly White trade unions.

● Solidarity Unionism

While unions in the general public discourse tend to be synonymous with union organizations officially certified by the National Labor Relations Board (NLRB) to enact their legally mandated collective bargaining rights (e.g., NEA- and AFT-affiliated unions), following scholars of the role of caucuses and autonomous workplace organizing, we take a much broader and simpler definition of union: a group of two or more workers acting together to improve their working conditions. Solidarity unionism as a theory of radically democratic (and often anti-capitalist, anti-racist) unionism arises from the intellectual traditions of industrial union and poor workers' movements in the US and globally (Ness; Tait). Briefly and simply, solidarity unionism suggests workers build collective power by determining their own issues, demands, and actions via democratic processes of decision-making and participation. Attentive to and critical of the limits of business unions and legal impositions on workers' abilities to organize, solidarity approaches rely on creatively withholding labor, whether it's legal or not. As an Inland Steel worker from Chicago in the late 1930s describes, when workers wanted to make a change to their conditions, "the people in the mill . . . had a series of strikes, wildcats, shut-downs,

slow-downs, anything working people could think of to secure for themselves what they decided they had to have” (Lynd 20).

While solidarity unionism has many overlaps with social movement unionism, they derive from related yet distinct areas of thinking, organizing, and writing, and so we distinguish it from the latter. Solidarity unionism helps us to understand worker organizing for rank-and-file power in their workplaces and within their unions and derives from the intellectual traditions of industrial unionism, e.g., the IWW. Social movement unionism, in the interdisciplinary and praxis-focused literature broadly within social movement studies, often necessarily employs practices of radical workplace and union democracy to organize with and for broader social movements and toward broader social visions (Stark). Solidarity unionism as a theory and tradition within some of the most aspirationally liberatory movements for industrial unionism may help us to understand the significance of rank-and-file power over their workplace institutions, and social movement unionism pairs such a rank-and-file focus with more pointed considerations of the role and purpose of these institutions within society.

A significant source of trade unions’ aversion to radical democracy is their historical exclusion of the meaningful participation of women and Black, Indigenous, and other people of color (M. Murphy; Sakai; Urban). Critical race and Whiteness scholars have argued that up until the mid-to-late nineteenth century, racialized categories were contradictory, changing, and regionally specific to the social and political landscapes of the Northeast, North (now Minnesota), South, Indian Territory (now-Oklahoma), and West Coast. This period in history was one of immense change: Post-Civil War Black, Indigenous, agrarian populist, Chinese worker, and Irish and Eastern European immigrant radical socialist, among other resistance movements threatened the contingent social order of the emerging US (Frost; Roediger).

In the early colonies, the Anglo-European ruling elite had already begun “racially elevating” poor White European indentured servants, the majority of the non-enslaved workforce, by ensuring free White men’s “legal, political, emotional, social, and financial status . . . was directly related to the concomitant degradation of Indians and Negroes” (Thandeka 43). Laws and policies emerged that encoded and hierarchized racial and gender difference and responded primarily to White indentured servants’ “intraclass collaboration” with enslaved workers, who often conspired to run away together and otherwise caused land and slave owners trouble (Thandeka 44). Legal and social mechanisms of racial and gender hierarchy persisted in the industrializing US, often to tamp down on worker rebellion.

The history of industrial unionism offers an illustrative example of the emergence of solidarity unionism in the US to challenge White supremacy in the US labor movement. Since its inception and heyday in the early years of the twentieth century, the IWW has aspired to be a union of direct, democratic control. While the American Federation of Labor (AFL) during its inception around the

same time organized under the premise of “a fair day’s wage for a fair day’s labor,” the IWW organized under the principle, “abolish the wage system.” Their principal understanding of the nature of capitalism led the two unions to pursue wildly different organizing roles. IWW membership and local leadership roles were extended to all workers irrespective of race, nationality, ethnicity, gender, trade, or skill level. The IWW’s desire to organize the unorganized, the people whom the AFL would never seek to organize, that led to a boom in membership between 1906 and 1917 (Thompson and Bekken).

Theoretically, the IWW seeks to gain power through mass movements within labor unions rather than electoralism. Father Thomas Haggerty, creator of the industrial union structure known as Haggerty’s Wheel, desired to organize all workers under the One Big Union which would be democratically operated through a series of industrial committees staffed by rank-and-file delegates within each industry. Once all workers have been organized in this fashion, workers could then shut down the entire economy by engaging in what is known as a general strike (Thompson and Bekken). A massive wave of workers refusing to engage in work would shut down the operating mechanisms of capitalist industry, thereby forcing the bosses to negotiate their terms of surrender. Workers would then have sufficient power built up through this mass strike that would ensure worker control of the means of production alongside the apparatus of managing a non-statist entity of worker-controlled industries.

The IWW’s emphasis on worker control through industrial unionism and its eschewance of electoralism put it at odds with more moderate trade unions. In business unions, elaborately written contracts negotiated by paid union staff and directed by union leadership are the main source of employer accountability. In contrast, the IWW seeks for workers to control negotiations in direct systems of governance. Contracts are brief, often seen less as specific obligations of two parties and more of a truce between the working class and the employing class. The main lever of accountability in this approach is the threat of workers’ withholding their collective labor (Thomsons and Bekken).

The IWW’s efforts toward worker control of production via industrial and concertedly multiracial organizing led to many major uprisings during its heyday in the early twentieth century. Its most successful committee was the Agricultural Workers Organization (AWO), which, at its height, comprised around 100,000 multiracial members across the nation. The AWO pulled off one of the largest agricultural worker uprisings of its era in 1914, creating “‘the world’s longest picket line’ running 800 miles from Kansas up to Rapid City, South Dakota . . . Confronted with a critical labor shortage at the time, the growers had to give in” (Sakai 155). Despite the organization’s purported multiracialism, historians of the IWW suggest that its failure, in practice, to create antiracist, anti-sexist leadership and organizing practices, alongside its violent repression by the state, ensured that revolutionary industrial unionism remained (and continues to remain) a marginal theory/practice within the broader labor movement (Sakai).

The IWW offers a window into the lengths toward which employers and the state disciplined and policed multiracial worker organizing. As such, immigrant and poor workers of color have organized themselves, excluded, for the most part, from major business or trade unions. Tait writes, “Many in the traditional labor movement did not believe poor workers could be organized, either because of their fluctuating job status, or because of prejudices against their race, ethnicity, gender, poverty, or immigration status” (7). As such, many poor workers unions challenged unfair working conditions but also, and interrelatedly, took up broader struggles that directly affected them, including for immigrant rights, gender pay equity, and the recognition of domestic, caregiving, and service work as labor worthy of organizing. In her study of poor workers’ unions, Tait recounts the economic initiatives of the Civil Rights era movements—tenant and service worker organizing. Tait calls this the “other labor movement . . . composed of independent and community-based labor organizations.” She argues, “It is these supposedly marginal workers who are increasingly important in both the US and world economies” (10). Challenging the “image of the working class as blue-collar men,” Dorothy Sue Cobble importantly notes that the casualization and precaritization of work is feminized and that “[p]aying more attention to women and to women’s jobs, then, is essential if we are to understand the experience of the majority of workers” (2-3).

In higher education, academic workers have long organized via solidarity approaches, as the legal employment status of graduate students and adjunct professors has historically been contested, with universities, often with aid from the NLRB, arguing the contract nature of academic employment. Higher education labor historian Zach Schwartz-Weinstein, in an interview with *Jacobin Magazine*, suggests the significance of thinking the solidarity unionism, by necessity, of graduate employee and adjunct faculty organizing together with the “red state” strikes:

Organizing in a context in which there is no prospect of legal recognition, as graduate employee unions have had to do in the very recent past . . . is actually really instructive for thinking about how to organize in a Right to Work context. . . . It’s important to think about what a union can look like outside of the kind of protections afforded by a Fordist collective bargaining regime and the legality provided by the National Labors Relations Act. (Schapira)

In fact, Rebecca Kolins Givan writes of our current moment, “the line between strikes that are legal and those that are technically illegal is growing thinner and less consequential” (7).

For their part, trade unions have been historically hesitant to support or affiliate with contingent academic labor given the precariousness of recognition, although contingent faculty movements have gained ground in some places (Berry and Worthen). In 2016, the NLRB proposed a rule that determined graduate student workers were not employees eligible for union recognition.

In 2021, it withdrew the rule, yet the NLRB's position on graduate student workers' rights is often in flux and dependent on the political party in power (Douglas-Gabriel). Because they were unable to rely on legal recognition, Columbia University graduate employees—key instigators in the 2016 decision—articulated the necessity to forefront solidarity approaches. Union organizer and doctoral student Kate McIntire stated in an interview, “A contract first forces Columbia to share information with us about what those resources actually are, and then allows us to insist on issues rather [than] having to accept what they offer us” (Moattar).

Even in higher education institutions where faculty and employees have been unionized, research on academic casualization suggests that union membership and collective bargaining agreements have not necessarily led to a halt to the restructuring of work in colleges and universities, in the US or in Canada (Dobbie and Robinson; Herbert and Apkarian). SEIU has been one of the major unions to begin to organize adjunct faculty, yet it has been hesitant to engage in strike actions (Herbert and Apkarian). Even so, few faculty in the US belong to a union. Thus, like graduate employees, contingent faculty have had to engage in organizing, often, outside of formal unions. In 2015, for example adjunct labor activists attempted to organize a mass work stoppage of adjuncts nationally. It began when a group of adjunct activists wrote to the Department of Labor “calling for government investigations into wage-theft, teaching load reduction and other unethical/illegal labor practices, garnered nearly 10,000 signatures in summer/fall 2014” (Kahn et al. 5).

This effort led to the organization of the National Adjunct Walkout Day, mainly via social media. While universities were not shut down, large scale protests at universities across the nation took place. In cases where unionized faculty have recently struck, as Seth Kahn writes of the 2016 strike of the Association of Pennsylvania State Colleges and University Faculty (APSCUF), solidarity approaches were key. APSCUF faculty decentralized their work through a strike team that intentionally excluded members of the executive leadership, calling up people with specific skills who may not have previously held leadership positions. Further, the strike team encouraged widespread participation in the organization of the strike up to a year prior to the action (“Solidarity Invoked” 252-54).

In sum, theories of solidarity unionism emerged through early US and international efforts at poor workers', multiracial, sometimes multi-gender, and industrial organizing. With its violent repression and the evolution of the implicit association of the “working class” synonymous with “White men” (Roediger), theories of solidarity unionism emerged through the efforts of workers excluded from trade unions and NLRB recognition. With the ongoing attempts to limit legal recognition and collective bargaining for many workers, e.g., graduate student employees and nonunionized contingent faculty, solidarity unionism beyond the legal strictures of trade unions are emerging as a key approach for building worker power.

● Social Movement Unionism

In the years since the Great Recession, lower and higher education unions (and unionizing attempts) have come under intense attack via legislation that has drastically expanded school and curriculum privatization and cut education funding. Simultaneously, many educator unions have existed on the frontlines of school austerity and the COVID-19 pandemic, demanding, as with the most recent wave of educator militancy, the restoration of resources and robust public health safety measures in schools. Labor studies scholar Saturnin Dandala writes that “while the role of teacher unions in bargaining for the economic interests of their members has somewhat been studied by industrial relations researchers, unions’ role in advocating for social justice, such as militating for student welfare, has received little interest among [labor] scholars” (572). However, studies of solidarity and social movement unionism offer significant resources for understanding political differences and tensions from within educator unions.

In higher education, labor studies of contemporary social movement unionism are fewer and farther between. Piya Chatterjee and Sunaina Maira suggest that a significant reason for this is the ways in which higher education resists and marginalizes scholarship that seeks knowledge of its institutions and social functions (12). Much of the existing scholarship of social movement unionism in higher education is rooted in movements within and beyond the university, including feminist, queer, Black, Indigenous, and other liberation movements (Meyerhoff). Louise Birdsell Bauer, in her study of the University of Toronto graduate employee strike, argues that social movement unionism among higher education labor movements is made possible by workers’ taking up political identities that reject professionalist discourses that they are “professors-in-training” but rather precarious workers in a system that structurally requires precarity (275). Contemporary precarious worker movements among graduate students and contingent faculty are building social movement coalitions and making important connections between relative precarity in higher education labor and other facets of our current political-economic moment, such as widespread crippling student debt or the ways in which most people’s lives have become increasingly precarious via the overall decline in living wage salary and benefits-offering jobs (Bauer).

In the scholarship that emerged from the 2012 Chicago Teachers Union (CTU) strike, several scholar-activists elaborated the significance of the social movement-oriented caucus, CORE, taking control of the union and ousting the stagnant former leadership. Movement and scholarly studies have highlighted CORE’s emphasis on community-based organizing and a commitment to building grassroots power (Nuñez et al.; Uetrict). Further, scholars articulated the significance of its analyses of the relationship between Chicago’s urban planning policies to gentrify and cosmopolitanize the city and its school closure and privatization policies. CORE’s research arm linked various strategies by city

leaders to upwardly redistribute public money and power to reshape working class neighborhoods close to the city center into a mass of luxury condominiums. CTU's strike aimed to redistribute that power to the BIPOC working-class communities most directly affected by these oppressive policies (Lipman). In this way, social movement teachers' union activists and scholars have sought to articulate theories of power founded in critiques of capitalism, White supremacy, and heteropatriarchy (Blount; Quinn and Meiners). The small body of education and social sciences scholarship on social movement unionism has most directly attended to theories of power and change in unionisms.

Likewise, within education research, scholars articulate social movement unionism as a form of organizing beyond workers' immediate economic interests and toward transforming social institutions as part of a larger coalitional project to transform and democratize society and governance (Peterson, "Survival and Justice"; Stark). However, Weiner, veteran union activist and scholar, suggests that formal education unions have, since they won collective bargaining rights in the 1970s, pushed aside serious conversations about race, class, and gender through the predominance of business unionism, or representative and centralized leadership distanced from educators' everyday work ("The Future of Our Schools"). This aversion has stultified rank-and-file participation in their unions and their study of for whom, for what, and how they are fighting. In the following chapters, we take up a more sustained discussion of these tensions. In Chapter Four, we discuss the significance of the recent rise of social justice caucuses and transnational networks of social movement unionism and their efforts to challenge often anti-democratic and narrowly professionalist business unionism (Bocking; Stark).

Cindy Rottmann and colleagues write that educator unionists have long organized with and for social movements—from early women's movements to early twentieth century communist and social movements to Civil Rights era and contemporary movements (53-54). Educators organized within their trade and professionalist organizations for broader union responses to the social issues facing their students and families (54). While the CORE takeover of the CTU in 2010 is one of the more widely documented contemporary examples of and catalysts for social movement unionism, analyses and calls to action from teacher unionists suggests the latest wave of social movement unionism has roots in the late 1980s and 1990s as public education began to feel the impacts of the effects of neoliberal policies. In 1999, teacher unionist Bob Peterson describes social justice unionism as a "perspective [that] informs a range of topics—from union democracy to the purpose of schooling, from teachers' relationships with students, parents, and community to the need to radically restructure society" ("Survival and Justice" 11). For him, social justice unionism builds on the best aspects of what he describes as industrial unionism, which "focuses on defending the working conditions and rights of teachers" and professionalism, which emphasizes "teacher accountability and quality of school programs" ("Survival and Justice" 14).

Weiner suggests an important difference between “social justice” and “social movement” unionism, advocating for the latter to describe how educator unions are working and should work toward specific justice-centered political and social visions. She writes that the term social justice unionism has become common place, “I think the idea of a ‘social movement’ unionism is more useful because it addresses the need for transformation of the unions internally, especially the need for union democracy” (“The Future of Our Schools” 197). However, Stark, in her study of social justice caucus networks uses the terms interchangeably and prefers social justice unionism because it is most commonly used in practice by organizers. For Weiner and Stark, as for us, social movement unionism is predicated on radical democratic participation of its members and its social justice aims. Further, social movement unionism is accountable to the social movements that shape each union’s terrain of schooling—whether its anti-gentrification movements, food justice, climate justice, and so on.

As Peterson notes, advocates of social justice or movement unionism also understand the necessity of inter-movement support for winning campaigns and demands (“Survival and Justice”). Just as Bauer suggests the significance of “precarious worker” political identities of higher education workers in building coalitions with related movements, K-12 educator social movement unionists work beyond simply the interests of their communities. They operate with keen analyses of what Lois Weis and Michelle Fine term “critical bifocality,” who understand how they and their students’ experiences in their classrooms (the micro) is interrelated with global circuits of dispossession and privilege (the macro) (194; Asselin).

In the Global South, social movement educator and student unionism has been closely tied to issues of climate change, dispossession of Indigenous and poor communities’ access to land and water, and neoliberal austerity policies. The violently repressed 2011 student strikes in Chile emphasized the US-inspired neoliberal education reforms privatizing and making profits from public schools (Bellei et al.). In Brazil, Mexico, and many other places, educators and social movements have engaged in mass strike actions to protest neoliberal austerity policies (Bocking; Stark and Spreen; Tarlau “Occupying Schools”). At the start of 2019, Zimbabwe educators engaged a national strike to protest rising inflation, which made the purchase of basic necessities for everyone near impossible (Education International). The spiraling inflation is a result of colonialist structural adjustment policies imposed on the nation by the International Monetary Fund and the World Bank.

Across the world, educators have been rising up against privatization, stolen land and poisoned water, and facing outright violence and repression. In Ayoztinapa, Mexico in 2014, forty-three student teachers were murdered for protesting police brutality (Washington). Social movement unionism necessitates participatory and democratic unions yet also seeks to understand, in practice, the relations of repression, dispossession, and containment with which the education system is intertwined. As the movement saying suggests, police brutality

of educators in Mexico is tied with colonialist violence in Palestine is tied with my neighborhood and yours, neighborhoods in which schools are always central features and contested terrains.

● The Emergence of Solidarity Unionism in the 2018 Strike Wave

While all four orientations to unionism and more were in play at any moment during the 2018 “red” statewide strikes, we argue that solidarity unionism emerged as a significant means by which rank-and-file educators catalyzed the statewide educator uprisings. Educators organized within and in tension with their trade unions to strike in states where striking is illegal. In all four states, state and local union organizational power had been eroded by anti-union laws and policies (e.g., Right to Work laws) since the 1990s. In Arizona, Oklahoma, and Kentucky, NEA-affiliated state associations articulated themselves not as unions but as professional advocacy associations (Hale “On Race”). Solidarity unionism emerged as a means for workers excluded from the decision-making processes that govern their trade unions and workplaces to pressure their school administrations to shut down. Educators, to varying extents in different places, formed dual power organizations, or organizations that worked in tension and collaboration with their trade unions.

○ West Virginia: “Workers Were Not Satisfied with that [Service] Model”

The WVEA stalled organizationally after the November 2016 election. At their annual delegate assembly in April 2017, WVEA President Dale Lee stated, “The WVEA is broken.” Few locals had operating budgets, monthly meetings were scattered and never attracted more than a handful of members, and local political action committees could not mobilize enough people to get out strong Democratic votes for endorsed candidates. Building representatives (stewards), who are unpaid, did not always attend monthly meetings nor were they able to share pertinent information with fellow union members in their school on policy or electoral matters. Electorally, the unions could do little to stem the tide of conservative lawmakers sweeping into office on the back of Trump’s populism. The state senate swung from a slimmer 16–18 Republican majority to a 12–22 Republican majority. At the 2017 delegate assembly, President Lee announced gleefully that the WVEA’s endorsed governor candidate and West Virginia’s only billionaire, Jim Justice, had won his race. Governor Justice went on to switch back to the Republican Party later that year. At the time, his election was hailed as a saving grace to an otherwise poor election turnout.

WVEA members were expected to take on the brunt of these challenges partly because association staff was overworked. An Organizational Development

Specialist (ODS) with the WVEA must cover on average 7.85 counties in the state. Commutes from one end of a single staffer's region to the next can range up to two-and-a-half hours. In Monongalia County, for example, there are eighteen K-12 schools in total. This is only one of nine counties that the ODS of the Northeast district must cover. If an ODS only visited schools, one of their multitudinous daily tasks, it would take anywhere from fifteen to seventeen weeks just to visit each school in their region. In a thirty-six-week school year, almost half of the year would have been devoted to making rounds to the counties an ODS represents, ensuring that members' concerns were fully heard and understood.

An emphasis on lobbying lawmakers and pushing for electoral changes did little to galvanize a base of support to fight for strong public education. Emily Comer, a key organizer during the walkouts, said to Brendan in an interview, "I've always belonged to a union and paid my dues, but until the strike I never felt like it held much of a presence in my life in the way much of my other organizing does." Handing out highlighters, calendars, and notepads at the beginning of each year as enticements for new educators may be a good marketing strategy to gain members, but it didn't make members feel they were connected to a union prepared to go headlong into a fight. "Years of asking nicely instead of wielding power helped us get into our current mess, and workers were not satisfied with that model," Comer said. Lobbying is far-removed from teachers' day-to-day work and undertaken by mostly paid professionals who might or might not have experience as a classroom teacher.

In the previous national election, members were mailed endorsement lists while mass emails were sent out months and weeks beforehand. Directives informing members who to vote for, rather than why they should cast their votes in that direction, created a transactional relationship in the minds of many members; vote for the Democrat because the Republican is a worse choice. "It's easy for leadership to say, 'We don't have any power because our members just won't show up to meetings,'" Comer said. "But who wants to show up to a meeting to talk about lobbying? People want to belong to a vibrant, organizing-focused union that puts its money where its mouth is."

The lobbying efforts of WVEA and AFT have produced some results that members have taken note of in recent years. For one, West Virginia—with a population of 1.8 million residents—is one of a handful of states that did not have charter schools at the time of the 2018 strike. Attempts to push pro-charter bills out of the education committee were met with firm opposition from both parties until more than a year after the strike. While the state's educators struck again in 2019 against what they viewed as retaliatory privatization legislation, it passed soon after (Reed). In 2006, teachers across the state staged a one-day walkout to protest a mediocre pay raise proposed by then-Governor Joe Manchin. A few years later, teachers received a \$1,000 pay raise across the board, but educators realized this was a drop in the bucket. Rising healthcare costs quickly ate away at the bump in pay, making it evident that the raise was simply an attempt to quell the growing unrest of education workers. Matt McCormick, a WVEA member,

said that the tactics of “lobbying a hostile legislature and holding the occasional rally” were typical of this period in the union’s history. Even with the one-day walkout, “there was a longstanding trepidation that manifested any time that the word ‘strike’ was broached.”

In 2016, the state senate voted along party lines to approve a bill that would have allowed for the formation of charter schools. Initially, the bill would have allowed for two charter schools to be created each year for the first five years. Senator Greg Boso (R-Nicholas), who represented a predominantly rural district, was in favor of the new educational model, arguing that it would attract businesses and more competitive teacher salaries in rural regions of the state (Ebert).

Lobbying Republicans to vote against the bill did not have the desired effect as it might have had in years past. Party-line voting meant that lobbying allies in the state legislature would only be as effective as long as those (Democratic) allies retained their seats. As Democrats lost control of the state legislature in 2014, union officials turned to lobbying as their main strategy to stymie the rising tide of conservative law-making. The bill was not signed into law, but in an election year, it showed the power of a slim Republican majority. The state unions were generally perceived as lobbying arms, and members who wanted their unions to do more found this perception difficult to challenge.

When members had an idea for making change to union strategy, they were met with little confidence from leadership. Jay O’Neal, co-founder of the WVPEU page, moved to West Virginia in 2015 and quickly realized that it would take more than asking nicely to move leadership in the ways he felt were needed. “When I would go to leadership in the past with some ideas, I got either a non-committal response, it might take forever to get to someone on the board, or I would get a thank you email but no follow up,” O’Neal said. “One of the biggest problems is the split between AFT-WV and WVEA, and even though they want most of the same things, it was hard to work between the unions because of their bureaucracy.”

West Virginia’s initial attempts to halt the floodgates of reactionary legislation came together slowly. Over the summer of 2017, O’Neal and Comer had worked together to create the secret Facebook group that would later be used as a springboard for future direct action, WVPEU. Education workers who had expressed discontent with the lobbying tactics of WVEA and AFT-WV were invited to join and take on an active role within the space. At first, the goal for the secret group was to create a mass collective that workers could join and learn about issues related to their health care, salaries, and education-related efforts at the legislature. Through this group, O’Neal and Comer suggested to WVPEU members that a Lobby Day at the capitol might be the first beneficial use of the group’s time and effort.

WVPEU members were tasked with researching issues important to educators, determining which legislator was friendly or hostile, and putting forth presentable material that could then be used by rank-and-file educators on Martin Luther King, Jr. Day, the day that the WVPEU group had set for the Lobby Day. It was around November, however, when O’Neal was summoned to WVEA’s main

office in Charleston. Apparently, one of the Facebook group members added an executive committee member for WVEA, who informed President Lee that there was an effort to push for lobbying legislators outside of the purview of the union establishment. After meeting with Lee, O'Neal's union leadership gave the greenlight to officially sponsor the Lobby Day—likely because O'Neal, Comer, and others had already organized members and made plans beyond the union via WVPEU.

A few hundred WVEA teachers and their allies attended, bolstered by the belief that 2018 could be a year of a renewed union membership. In the previous year's Delegate Assembly, Lee and David Haney, executive director of WVEA, had called upon locals to make plans of action that would breathe fresh life into the union. With a crowd gathered around the rotunda of the capitol, Lee addressed the crowd thus: "I've heard a lot of people talk about 'It's time for a walk-out or time for a strike.' But those are not the first steps in that decision. It's not the first step in what we should do to achieve our goals. If we were to get back to that, there's a lot of groundwork that needs to be laid beforehand." Lee's reference to a strike undoubtedly came from local WVEA presidents and sympathizers, who almost certainly had been witnessing an explosion of reactions across the state demanding the unions take further action.

Earlier that month, Governor Justice spoke at his annual State of the State address and named education as his centerpiece for a new, revitalized West Virginia. His proposal was simple, though; a two percent raise for public school teachers, amounting to around \$800 per teacher. This paltry raise would have been eaten up by premium increases to the PEIA. Simultaneously, the WVPEU page began to explode with membership—from a few hundred members in November to several thousand and eventually more than twenty thousand by January. Talks of more militant action permeated the online space, while attempts to lobby hostile legislators continued at the capitol. The result was a perfect storm of impromptu organizing.

Stories began circulating online about legislators accosting teachers for having the gall to push back against premium increases, of representatives outright rejecting attempts to work with teachers to craft policy that could assist in making West Virginia schools better, and of delegates simply misunderstanding basic economic facts and data that the unions presented to them (Howell and Schmitzer). In addition, the state had begun to roll out its GO365 plan at the beginning of the legislative session. This plan would, in one teacher's words, "gamify" an employee's health care. Insurance holders would have been required to log into an online system that would track their health plan. Policy holders would receive points based on the level of exercise that they completed, with an annual point goal that increased each successive year. Failure to meet the set criteria would result in increased deductibles and premiums.

As things were heating up across the state, AFT-WV and WVEA locals began holding cross-union meetings to discuss the impact of the proposed changes to PEIA. A vote of authorization was called in early February that year, which

would signal support among the rank-and-file for a walkout. County presidents tallied their votes the following weekend in the town of Flatwoods and found the vote had received overwhelming support—upwards of eighty-five percent of voters stated that they would authorize their union to call a walkout in protest of the proposed changes to PEIA.

On February 17, the following weekend, a collection of United Mine Workers, AFT-WV, WVEA, and service personnel members joined together at the capital to call for unity in action—the walkout that members had wanted to see was announced for February 22 and 23.

○ Kentucky: “We Became Activists Accidentally”

Like West Virginia, Kentucky does not allow most public employees to engage in collective bargaining, except for the JCTA, a local affiliate of the state union, KEA. JCTA represents teachers in the most populated county in the state and the county where Louisville is located. Like the WVEA and AFT-WV, the KEA and its local affiliates mostly relied on lobbying efforts to advocate against austerity. In 2017, Governor Bevin had released a series of reports titled “Pension Performance and Best Practices Analysis”—known as the PFM reports after the Philadelphia-based consulting firm that authored the reports—that argued for the systematic dismantling of the state’s pension plan and moving it over to a standard 401(k) (Bailey). KEA had lobbied vociferously against the pension reform bill and seemed sure that Governor Bevin’s pension overhaul plan would be stopped before it had time to germinate. On a muggy November afternoon, public employees across Kentucky held a “Save Our Pensions” rally at the capitol steps in Frankfort. The rally was called towards the end of a special session initiated by the Republican-controlled legislature and governor’s office, where the pension overhaul plan was set to be enacted. The rally, organized by independent activist groups, union sympathizers, and the newly-formed online group, KY United We Stand, had defeated the measure.

Public sentiment had been geared towards defeating the special session and halting changes to public employee pensions in a winter session. Once that session ended, the major state unions believed that it was better to hold off on any collective action until they knew more. Katie Hancock, a social worker and organizer of KY United We Stand, believed that the rally would only be the beginning of the fight. When she helped to organize her fellow social workers under her secret group, the idea was that union and non-union members would be included. KEA had been conspicuously absent from the “Save Our Pensions” rally, even if members had been in attendance. Adding teachers to the online KY United We Stand group shifted a dynamic for Kentucky’s state employees in ways that could not have been done solely within the confines of one union or another. “We noticed that we had few teachers on the [KY United We Stand] page, even though they were going to be affected by the same things we were going through,” Hancock said about efforts to reach out to and include teachers.

“This is why we shifted our dynamic from just focusing on the pension plan to funding public education.”

As a non-education state employee, Hancock could be a member of the Kentucky Association of State Employees (KASE), a labor advocacy group similar to the KEA, but one which had less political power as of late. Even still, Kentucky state employees don’t officially have a collective bargaining unit. “We have KASE, but as far as I know, they go to our [KY United We Stand] page and share our content to their group, so it’s pretty much as if we’re doing their work for them.” KASE had become de-legitimized in the minds of state workers over the decades of anti-union legislation that Kentucky passed, with KASE’s role as advocacy group becoming less prominent and membership declining. Hancock said, “There’s no real representation that the average state employee can rely on, so we just decided we had to do it ourselves.”

Earlier that year, Bevin’s administration had released a series of three PFM reports that highlighted the conservative legislature’s agenda for radically transforming Kentucky’s state pension system into a traditional 401(k) model, as mentioned above. The reports outlined several critical challenges Kentuckians faced with their pension plan, but it was clear that privatization would be the goal. On the first page of PFM #1, the report states that Kentucky’s pension plan for FY 2015 ranks the lowest of all fifty states for funding ratios, setting aside a paltry 37.4 percent of funding levels needed to fully fund the plan. The report states that, “While funding levels are higher for the public safety, local government, teachers, and judicial and legislative programs, all of Kentucky’s systems are underfunded and the aggregate challenges remain quite severe” (4).

Initially, PFM #1 introduced the idea that transparency and stricter governance of funds would provide greater control of overhead costs for managing Kentucky’s various pension plans (PFM Group, “Interim Report #1”). This was followed by a May 2017 report that signaled a move towards privatization. In PFM #2, the proposal outlined a trajectory of current costs for the state when compared to border states and across the US. The report argued that the solvency of the state’s pension plan could not last over the next decade, and for the continued existence of reliable benefits packages, significant alterations would need to be made (PFM Group, “Interim Report #2”). In August 2017, PFM #3, titled “Recommended Options,” proposed that public employee retirees would no longer see a cost-of-living adjustment (PFM Group, “Interim Report #3”; Bailey). In a state that does not provide social security benefits to state workers, this would mean living decades on a fixed income. Newer state employees would immediately be funneled into a low-return 401(k) plan in lieu of the state’s pension plan, and their retirement age would be raised. Current state employees would be moved to a hybrid model of state and 401(k) plans. Workers would also have to defer retirement even if they had been planning for this ahead of time, and they would no longer be able to accrue sick leave for retirement purposes.

It was in this environment that Kentuckians gathered outside their capitol steps to protest Bevin’s push to kick off thousands of Kentuckians from benefits

that they had earned through years of service. Matilda Ann Butkas Ertz, a music teacher from Jefferson County who had attended the rally, remembered, “The mood was angry and bitter. Teachers were filled with rage . . . At the same time, the governor had made hostile remarks about teachers, included calling us ‘thugs,’ who were ‘not sophisticated enough to understand the fiscal issues,’ who were ‘greedy . . . hoarding sick days . . .” This rhetoric recalled racist (“thugs”) and gendered (unable to participate in public budget matters) non-producer tropes mobilized to quell teacher militancy in the long 70s (Shelton), and sought to justify Kentucky educators’ absorption of continued state disinvestment.

The November 1 rally had been organized outside of the purview of the KEA, which was still coming to grips with the potential for mass action. Jeni Bolander, a fourteen-year special education teacher from Lexington, recalled feeling that the KEA had given up on members’ concerns. “The problems that we faced in 2018 were issues that KEA knew about in 2003,” Bolander said, “and yet they let the problems continue to snowball until we were forced to take action.” The rally did not necessarily have a large turnout, with anywhere from several hundred to a thousand public employees. But “there were Teamsters, and labor union folks, and everyone just seemed pissed about what was happening to us.” KEA had refused to endorse this rally, as they had refused to endorse all actions leading up to the statewide walkouts.

What came of the rally was less clear in the immediate moment. Nema Brewer, organizer of another major social media organizing group that grew out of KY United We Stand, KY 120 United (KY 120), described KY120 organizers’ frustrations with the narrow electoral focus of the KEA:

We became activists accidentally, and KEA is still in the lobbying mindset. There’s a big difference between being a lobbyist and an activist. We had gotten to the point that we were done talking, we were tired of sitting down and holding dinner. We wanted to put our boot on someone’s throat and flex our muscles. We couldn’t hold back anymore.

As the movement grew, so did disagreement around the core issues facing public education, and tensions within the KEA emerged from the longstanding marginalization of Jefferson County educators and BIPOC communities.

○ Oklahoma: “I Remember What This Meant to Our Family”

Similar to other states, the lead up to the strikes in Oklahoma had begun at least a year prior within and without the OEA and AFT, even though much of the media attention centered on the strike actions themselves. OEA is, by far, the largest union in the state, though AFT represents many education support professionals and non-teacher school staff. AFT also represents Oklahoma City educators (AFT-OKC), one of the state’s largest school districts and a few surrounding schools. While Oklahoma and Arizona educators may not have imagined that they would be walking out in the spring, the work of NEA locals and

groups of autonomous educators earlier in the academic year facilitated state educators' response to West Virginia and Kentucky: Oklahoma could walk out and walking out was the only way to create change.

As we discuss in more depth in Chapter Three, Oklahoma's entryway into the strike was largely represented in the media and analyses as led by Alberto Morejon and Larry Cagle—two educators who had headed up each of the two major Facebook pages: Oklahoma Teacher Walkout: The Time is Now (TTN) and Oklahoma Teachers United (OTU). However, our oral history and formal interviews with fifty-four educator-organizers in Oklahoma illuminate that much of the agitation and initial pressure arose from rank-and-file organization among strong, active union locals and ad hoc groups of educators that formed a year or more prior, including in Stillwater (see Chapter Four), Moore (Chapter Four), and Putnam City (see Chapter Five), among many other places. For many across the state, the failure of State Question 779 in November 2016, which would have raised the state sales tax by one penny to provide teachers a \$5,000 wage increase, was a major shifting point alongside local experiences of increased managerial surveillance and loss of teacher autonomy.

A year later, in January 2018, Cagle, a mid-fifties veteran English teacher at Edison Preparatory High School in Tulsa (at the time), shared with Erin in an interview that he and a friend and colleague at a different school, Jim (pseudonym), formed the early instantiation of what would later become OTU. Cagle's then-school, located in a wealthier neighborhood in South Tulsa, is highly regarded in the district and state with an economically, racially, and linguistically diverse, majority-minority school community. Even as Edison Prep received praise and high rankings, like many other urban schools in the state, the high school had become subjected to increasingly narrowed and scripted curricula and an authoritative administration that created a competitive school culture among faculty with little support. The school's district administration pushed a slate of venture philanthropist-backed school reform policies and practices disquietingly like those that, in previous decades, sought (and seek) to capitalize on the "crises of failure" in post-Katrina New Orleans, Chicago and many other cities. Tulsa Public Schools superintendent, Deborah Gist, was, herself, trained at the Broad Academy, a two-year fellowship program dedicated to training educational leaders within a paradigm of school efficiency, choice, and market-driven policies (Casey). Leaders are groomed into advancing the privatization-oriented schemes backed by the Eli and Edythe Broad Foundation (Saltman). Tulsa's historically Black and Latinx communities in the north and east parts of the city increasingly experienced school closings, turnarounds, and consolidations to make space available for new corporate-backed charter school ventures.

At Cagle's Edison Prep, even as one of the wealthier schools in the district, the high rate of teacher turnover each year provided a telling glimpse of the conditions public school educators faced in the city. Cagle and Jim recruited a few other educators in two of the city's high schools to organize a sick-out on January 25—three weeks prior to the West Virginia strike. Around fifty teachers

between the two schools called in, causing students to spend their day gathered in auditoriums or cafeterias. For their efforts, they received some attention in the news (see Mummolo). Discussing the events two years later, Cagle described himself as “totally a union person” and a union member in his younger days in other cities. However, he had not been a member of Tulsa Classroom Teachers Association (TCTA) or OEA.

The early action caught OEA, TCTA, and district leaders by surprise and they quickly distanced themselves from OTU, calling it a “fringe group.” As then-vice president of TCTA, Shawna Mott-Wright stated in a press interview, “I have had no members reach out to me about this” (Mummolo). The early action taken without engaging the union in advance set the antagonistic tone of Cagle and OTU’s relationship with OEA leaders from the beginning. Cagle was, perhaps, not wrong to avoid consulting OEA leadership from the beginning as they fought to avoid or limit the strike until rank-and-file pressure from within the unions and on social media made it appear inevitable. An OEA staffer stated: “It’s going to happen with or without us, so we need to help” (Blanc, “Red State Revolt” 153). Some members of the TCTA familiar with Cagle felt that his actions were not taken in collectivity but mainly were taken individually and with great risk, for which Cagle, upon reflection in an interview, expressed regret. We explore this further in Chapter Four.

From there, OTU grew initially, as well as lost members quickly after participants in the first sickout action became fearful of retaliation. By mid-February, students at several schools had organized successful walkouts, including more rural towns like Keifer (Thompson). At Edison Prep, two sisters, including then-junior Faith Shirley, coordinated hundreds of students to walk out on February 14 to protest teachers’ working conditions and students’ learning conditions. They successfully won their demand to fire their principal at the time, Dixie Speer, who students argued created a “negative climate” at the school (Hardiman).

Cagle described to Erin that organizing the sickouts felt surprisingly easy, in a way that shocked him at the time. With the intensity of the teacher shortage, he knew they only needed a few to participate to shut down normal operations. As OTU grew in notoriety, Cagle reached out to educators in the Oklahoma City area and other regions in the state to begin calling for a statewide teacher walkout, with continued resistance from the OEA. The leader of the most prominent Facebook group, TTN, Morejon, a young teacher in the mid-sized college town of Stillwater, attended an early organizing meeting at a public library in Oklahoma City, according to Cagle, and shared his plan to create his own page. More social media savvy than Cagle, and, like Cagle, willing to be public-facing, Morejon quickly grew his Facebook group by researching faculty employees across the state’s larger districts and direct-inviting them to join TTN, according to Cagle. As a result, the social media group had tens of thousands of educators seemingly overnight.

In the lead up to the strike, the most significant battle between rank-and-file educators and OEA came soon after the two Facebook pages blew up in membership. Initially, OEA leaders turned away from OTU’s calls for a statewide

walkout. On Tuesday, March 6, OEA president Alecia Priest announced the union's decision to walk out on April 23, after state testing. Immediately, social media sites were filled with furious teachers, who argued that OEA was limiting educators' leverage by holding the walkout so close to the end of the year. The state could have ended the school year with enough state-required instructional time to spare. Thousands of posts along the lines of one educator's comment "Make them fight!" lit up both pages. In the background (described in more detail in Chapter Three), groups of educators with OTU threatened continued sickouts and educators within local unions across the state voiced their dissatisfaction with the state union.

In response to this outpouring of anger and collective pressure, the OEA sent an email to its membership implying cooperation with the state's two hundred superintendents and their support for the April 23 walkout date. Almost as immediately, a Cooperative Council for Oklahoma School Administration (CCOSA) representative sent an email to all school staff that was screenshotted and shared to the OTTN group stating the OEA email was "a misrepresentation of the facts," and that, "CCOSA has not taken any official position on any plans at this time. We know that local districts will make decisions based on their communities." Within the CCOSA, a minority of more enthusiastic superintendents, like Chuck McCauley of Bartlesville, were in support of an earlier date. By Wednesday, March 7, the OEA abruptly announced its decision to push up the walkout to April 2, in time to threaten disruption of state testing and federal funding. OEA's list of demands to be met by April 1 included wage increases for all public employees and school staff and significant increases in school funding. Priest's public image among the state's educators shifted from enemy number one to beloved hero in a matter of just twenty-four hours.

TCTA, the largest local, took on a significant amount of work toward this effort after it became clear it was inevitable, with many teachers new to or inactive in their locals recruited to take on leadership and active organizing roles. This was the case for Hannah Fernandez, a first-year teacher in Tulsa. For many younger teachers participating in and organizing the 2018 strike, the 1990s teacher strikes in Oklahoma and elsewhere were a motivation, even as many did not know much other than the occasional anecdote from a rare veteran colleague who participated in the event. Many had older relatives who had experienced those strikes firsthand as teachers and staff and felt connected to a longer legacy of fighting for public education.

Fernandez remembered her father's experiences, a teacher in Maryland, on strike in 1990. She was well into the second half of her first year as a teacher in Tulsa Public Schools when she learned of the possibility for a statewide strike:

At first, I was like, "I don't know what I'm doing teaching! I'm not really gonna try to get involved in anything else right now." I just needed to keep my head above water in terms of surviving. And then as it all approached, there was an article shared [on social media] about my dad's

school district [back in 1990]. That was what really drew me in to like, “OK, I remember this. I remember what this meant to our family if this is going to happen.” So then I started showing up and doing things.

Fernandez attended a TCTA meeting where leaders invited people to sign up for committee work to prepare for the now certain larger actions that were to take place. She became one of a core group of eight women organizers for the local. This group of women, according to Fernandez, became her community of support in union organizing and in learning to teach as a first-year educator. They also organized several primarily awareness-building actions in the lead up to the strike, including canvassing the county to make people understand the severity of the issues and inviting them to attend legislative events and write their lawmakers of their support for teachers.

Rural educator, Michelle Waters recalled her motivation to support the strike and be involved in her OEA local stemmed from her experiences participating in the 1990 statewide strike as a high school student newspaper reporter:

So, I just remember, you know, the feeling of the spirit of camaraderie and as wanting to support our teachers and recognizing that we needed better education for us, and they need better working conditions. And you know, covering that kind of on an objective level, although it’s kind of hard to be objective and, just like, these are my teachers that you’re talking about. These are people that I see every day. And just, I remember being excited about that.

Waters’ formative memories of the 1990 strike as a student and her family’s unionist history in the railroad industry combined with the conditions of her students’ rural lives created, for her, a sense of purpose in striking to raise taxes on the state’s wealthiest (even as she remained skeptical of the state’s effectiveness at redistribution): As Waters described, “educators are on the front lines of that battle,” and they “see what’s happening.”

○ Arizona: “I’ve been Through that Before”

As a teacher in Chicago, Rebecca Garelli recounted to Erin in an interview that she had participated in the CTU and its historic 2012 education strike, though at the time she did not see herself as an organizer. “I wasn’t anybody special, just a regular rank-and-file member. You know, a pretty good foot soldier. I did what I was told, and I did it with a vengeance.” As a young person coming of age in the city during 9/11 and the war on Iraq, she had always been politically active, especially at anti-war protests. But she said she was “awakened” by the “racially charged” closings of Black and Brown schools, a main issue for striking CTU teachers.

After moving to Arizona, Garelli shared that she became frustrated by the low pay, horrible working conditions, and, as she described, the pervasive sentiment that teachers had no real power to change anything. “Coming from such a

hardcore union town, I was used to being respected. I was used to having rights.” She felt that her friends and colleagues did not, at first, share in her frustration, offering up platitudes when she asked questions about why they were forced to attend meetings without pay. “That’s just how it is here.” After meeting and receiving resources and encouragement from Jay O’Neal and other union activists via social media, Garelli felt supported to create a Facebook page for Arizona teachers. Through the process of managing the explosion of membership and discussion, nine others stepped up to lead the movement of Arizona teachers, forming the organizing core for AEU, which worked in collaboration with but intentionally distinct from the state union, the Arizona Education Association (AEA). Garelli said, “I was like, ‘You know what? I’ve been through a strike before. I have some ideas of what we could do.’” Indeed, many of the tactics that AEU mobilized were straight from the CTU playbook.

Vanessa Arrendondo, who began teaching in Phoenix, had never joined the union. She said, like many of her colleagues, she had a “negative perception” and felt like she could not afford the five hundred dollars per year in dues. She was already working before and after school to make ends meet. “When I joined Arizona Educators United is when I joined the union.” Arrendondo was spurred to action when she joined the newly created Facebook page that kickstarted AEU and took up Garelli and others’ offer to start a more formal organizing process. Arizona had the benefit of learning with and from the other three states. Guided by Garelli’s experiences and support from other strike organizers, the beginnings of an inter-state network of Red for Ed teacher unionists, the AEU collective learned a few key lessons.

First, they began their work committed to democratic participation. To avoid falling into the same hierarchical forms of out-of-touch decision-making that teachers like Arrendondo’s colleagues had been critical of within AEA, they decided to create a more formal system of communication beyond the free-for-all of social media. They began using their social media page more strategically. Arrendondo said in an interview with Erin,

It started with asking people to volunteer to work as liaisons. We are a grassroots movement. People slowly started volunteering. I created a list, with two lists, one for charter and one for public, which helped people to see which schools were missing liaisons. And then others stepped up and started getting themselves organized.

As AEU developed a liaison network of two thousand teachers across the state, they also began organizing escalating actions. First, wearing “red for ed,” along the lines of the CTU strike. Next, they began “walk-ins,” where educators, students, and parents showed up before school wearing red to rally and then walk into school together in solidarity.

Learning from the tensions between members, non-members, and business union leadership in the previous struggles, particularly the drastic drop in OEA’s membership after they called off Oklahoma’s walkout with minimal rank-and-file

support, AEA approached AEU with an eye toward collaboration. According to interviews with Garelli and Arrendondo and Garelli's written reflections on the lead-up to the strike in Rebecca Kolins Givan's and Amy Schragger Lang's edited volume on the 2018-2019 strikes in public education, AEU had plenty of leverage to hold their own against AEA, should they need to, given their organization and widespread participation across the state. Their collaboration was mutually supportive. The state union provided resources and organizing expertise and traveled across the state with AEU leadership to host regional trainings for the school liaison network.

● From Fear to Fire

In West Virginia, Kentucky, Oklahoma, and Arizona, the lead up to the strikes emerged in vastly different ways yet with many similar themes, namely, the slow (then quick) collectivizing of anger at legislators and corporate interests who were selling them out and selling out their students and communities. Caught between hostile legislatures, ineffective unions, and neoliberal reformist agendas, education workers found within themselves the foundations for charting a new path forward. Rather than choosing to lobby their delegates for improvements, they staged direct actions at their capitols to demand protections and halt reactionary actions; rather than choosing to rely on paid union staff to help set up channels of communication, they created accessible social media platforms themselves; rather than waiting for an election, they directly confronted their "bosses" in their respective legislative houses; rather than withhold stories of struggle and anger to pacify their rage, they shared their individual messages in collective spaces, generating continual energy for more action.

In each state, the lead up that began with fraught emotions, intense anxiety and fear and shifted toward collective fury, excitement, and possibility as events unfolded and the strikes became a realistic horizon. Mercer County Education Association president, Nicole McCormick's reflections in Givan's and Lang's edited volume speak to the zeitgeist of the moment, "When we fight, we win! When we stand together, we win! Most importantly, when we own our labor and decide that it is ours to give or withhold, we win!" (116).

As the strikes took shape, early feelings of unity and power grew yet also changed and became complicated by differences in understanding the significance of and the in-practice difficulties of building democratic structures amidst struggle, racialized, gendered, and class differences, and tensions and disagreements in understandings over for whom and for what broader purposes educators were withholding their labor. In subsequent chapters, we illuminate the ways in which competing professionalist, social movement, and trade unionisms permeated and interacted within the rising tide of rank-and-file educators.