



Chapter 4. Class, Elections, and Relationship with the State

Don't let anyone tell us that we—but a small band—are too weak to attain unto the magnificent end at which we aim. Count and see how many of us there are who suffer this injustice. . . . Ay, all of us together, we who suffer and are insulted daily, we are a multitude whom no man can number, we are the ocean that can embrace and swallow up all else. When we have but the will to do it, that very moment will Justice be done: that very instant the tyrants of the Earth shall bite the dust.

– *Kropotkin, An Appeal to the Young*

James Miller, a teacher in Louisville, recalled a political shift that took place in Kentucky after the 2018 walkouts:

People like to think that debt is a moral failing, but people are starting to see through it, that austerity isn't the most moral thing we can do and that raising taxes can help. And if we have to do these things and find other avenues for revenue, that's acceptable. . . . Political change is happening because of the [educators'] movement and because of the penny-pinching that's taking place in the state. I think this is a national issue, and we would've seen this drawing away from the center even without the teacher movement nationally, but I think it's a big part of this.

Many of the so-called “red” states continue to face an uphill battle against reactionary, Republican lawmakers. According to a February 2019 Gallup poll, conservatives in Kentucky outrank liberals by twenty percent (Jones), increasing the likelihood of either centrist Democrats taking control or conservative Republicans maintaining a majority in each election cycle. Miller described,

Part of it is a cultural factor in Kentucky because they've done such a good job of demonizing Democrats and liberals as making them dangerous people who want to get rid of morality and religion, and people think they would rather die than be a Democrat. . . . There are built-in disadvantages for people that they can't overcome at the local and state level because McConnell and other Republicans have used their power to take over in such a way that the national Democratic Party just didn't see it coming, and they've pushed this idea that voting is so important, but it doesn't take any of this into account.

As the 2018 strikes and the recent resurgence in education union militancy illuminates, rank-and-file educators, and perhaps the wider public, increasingly

understands the limits of electoralism. For many others, as Miller relates, and as Angel Worth came to understand after her failed state representative campaign (Chapter Three), an emphasis on elections alone may even be a dead end to political organizing: “If you told this tiny football team that if they just practiced enough, they would beat an NFL team, I’m sorry but that’s not enough. All these advantages that they have that practicing and rehearsing won’t overcome.” In Miller’s ideal world, however, unions would recognize this inherent disadvantage and find new paths forward external to the established political system: “When you have workers of all trades and all backgrounds, and if they are their allies consistently, 365 days a year, allies in this struggle, then that’s how you can build political power during elections at the ballot box and that’s how you build collective power against this electoral problem because we can’t sue our way out of gerrymandering.” For Miller, such an approach would require a “meaningful Left caucus” that could collectively lead the union to fulfill this solidarity unionist vision.

Unlike Miller, others in Kentucky had a different perspective on gaining power. After the strike, Jeni Bolander of the KY 120 social media organization believed that endorsements, get-out-the-vote campaigns, and lobbying potential allies was a smart strategy given the uneasy political terrain in her state. KY 120 committed the summer of 2018 to building a non-partisan electoral campaign that they had hoped would sweep out bad legislators—those that had voted for the Sewer Bill, which would have decimated teachers’ pensions, and were unfriendly to the movement—and bring in new legislators more amenable to their line of thinking. “It’s about building relationships,” KY 120 leader Brewer said in an interview. “We need to create a relationship with politicians that can help us win our fights when we need them.”

Bolander likewise believed that this strategy has more upsides than downsides. “Those relationships matter. Build them with your elected representatives whenever you can. Being able to text a representative during a vote and saying, ‘Don’t you even think about it,’ is important. It’s a big deal that we can do that and that it gets responded to.” The “accidental activists” went from being “just an average, working, tax-paying Kentuckian,” as Bolander described herself, to having candidates for governor conducting interviews at her house, seeking an endorsement from KY 120. This seeming shift in power meant turning away from direct action and into electoral political advocacy. Bolander recalled a conversation she had in 2019 as then-candidate for governor, Robert Goforth, was leaving her home after an interview. In Bolander’s retelling, Goforth stated that he would now listen to concerns related to public employees much more clearly because they had taken the time to sit down and talk with him, go through their issues with him as potential constituents, rather than showing up at the Capitol to scream during a walkout. “When we’re there enough, you can’t forget us, because you know we’ve been advocating,” Bolander stated. “If we just show up once a year for a walkout, then we’re an angry mob. We’re not a teacher, married to a teacher, trying to help protect our families and our pensions.”

In previous chapters, we discussed that unionist and movement leaders in each of the states had varying kinds of relationships of solidarity and engagement with non-educator-led social movements in their areas and different forms of (often new, tenuous) rank-and-file-led organizing infrastructure. In Kentucky, educators and educator movement allies rooted in Louisville-based movements for Black Lives had particular analyses of the state and its monopoly on racialized educational and physical violence against the city's Black communities. In many places, and illuminated most starkly in Oklahoma, women-led and feminist-oriented organizing, in and through educators' participation in the strike and their experiences as care workers in their homes and communities, developed key understandings of the state's (hetero)patriarchal devaluation, even derision, of women's decision-making, autonomy, and value as care workers. Many developed strong antagonisms against their business unions' anti-democratic collaborationism and gendered power inequities within rank-and-file groups like TTN and OTU. In both Oklahoma and Kentucky, feminist, queer, anti-racist, and left-worker movements became marginalized as broader rank-and-file militancy became absorbed within state union organizations that operated via centralized, hierarchical modes of representative organization. In Arizona and West Virginia, the formal extra-union or dissident union rank-and-file organizations that had formed during the strikes persisted in the years following in ways unlike Kentucky or Oklahoma yet with differing orientations toward and relationships with their formal unions.

In this chapter, we draw on transnational studies of worker organizing in educator movements to focus our discussion on a key strategic tension illustrated by Miller's and Bolander's differing perspectives. Arguably, this tension lies at the center of the resurgent militancy of contemporary education labor movements in our four states and beyond, as educators think with and practice unionism: To what extent should educators collaborate with and build power through relationships with the state (e.g., via electoral campaigns, relationships with legislators and other elected education leaders)? To what extent should educators build power through collective organization and direct action?

By "the state," we mean, generally, the webs of state institutions, political actors and parties, and governing bodies at the local, state, and national levels. As Hopland importantly notes, understanding the state also requires a deeper understanding of capitalism, and the ways in which state governance is entwined with and influenced by wealthy corporate interests (e.g., West Virginia coal baron Governor Justice's tax avoidance schemes for his private companies are interrelated with his interests in disinvesting from public education). Rather than answer this question prescriptively, we approach it descriptively, trying to understand with critical generosity and in-depth contextualization how and why certain collaborationist or pressure-oriented (or both) approaches to the state emerged as predominating or marginal during and in the aftermath in each of the so-called "red" state strikes. By considering these in relation to and learning from various transnational movement contexts, we pose it as a dynamic,

ongoing question that educators and unionists might regularly engage through critical and situated reflection.

● The Question of the State: A Transnational Perspective on Theories of Power and Change

In his case study analysis of contemporary education labor movements in Toronto, New York City, and Mexico City, Paul Bocking writes, “The key strategic political question is still how to deal with the state” (390). Since the long 1970s of militant educator unionism, as M. Murphy noted of the early histories of teacher unionism in the US, professionalism had become a strong discourse for state collaboration and against worker militancy during the 1980s and 1990s. In the US and Mexico, emerging market-based, neoliberal reforms aiming to deprofessionalize the work of teaching through an emphasis on datafication and privatization of public education, leaders of the NEA, AFT, and Sindicato Nacional de Trabajadores de la Educación (SNTE), Mexico’s national teachers union, and influential academics “argued for a turn away from militancy and the defense of contractual rights, to embrace new forms of teacher evaluation as a mark of professionalism, alongside teacher voice in school budgeting, teacher evaluation, hiring and firing decisions, implicating union members in managerial decision-making” (Bocking 51). Alternatively, Bocking writes, during this period Canada’s educator unions largely avoided the pitting of teacher professionalism against workplace concerns.

In Mexico, SNTE has historically had a more direct and intimate relationship with the state, given its emergence and relationship with the Institutional Revolutionary Party (PRI), a party that ruled the nation for seventy-one years until 2000 (Bocking). While major educator unions in the US and Canada are relatively independent of the state, they have long, often complex histories of engaging in electoral party politics (Weiner, “The Future of Our Schools”), and all three nation’s educator unions are subject to public sector labor laws and interventions that have sought to constrain worker militancy. As Bocking writes, collaboration with the state without an emphasis on union democracy and building collective power among union members, as it occurred in this era of neoliberalization, diminishes the power of a union overall:

[T]his work considerably reduces the opportunity for union officers to work directly with groups of members. In this environment, the markings of a union leader are fluency in a technocratic form of policy and quasi-judicial knowledge. A technocratic union becomes autocratic when these specific forms of expertise become unchallengeable by rank-and-file members, leading to their apathy and demobilization. (391)

Thus, a singularly state collaborationist approach without meaningful participation of members has extraordinary limitations, as the terms of engagement

are set by state actors (politicians and their interests). Alternatively, for anti-collaborationist and confrontational (militant) approaches, the terms of engaging in negotiation are set by workers themselves. Their ability to enforce the terms of negotiation (their power) is earned not from electoral political allies, rather from the strength of their collective organization. As we discuss via examples, social movements that prioritize meaningful and horizontal grassroots participation have undertaken strategies that work with and within state institutions/political parties and without and beyond the terms of electoral politics.

Union leaders' collaboration with the state to the detriment of meaningfully addressing educators' working conditions throughout previous decades were (and continue to be) sources of agitation that have spurred dissident militant rank-and-file union organizing transnationally. As the "global education reform movement" seeks "the transfer of public education funds to the private education sector, a growing industry estimated to be worth over US\$6 trillion," educators across the globe have responded and informed one another's efforts (Stark and Spreen 234; see also Bocking; Stark). For example, the Trinational Coalition to Defend Public Education is an organization composed of educator unions and unionists from Canada, the US, and Mexico that formed in 1993 to protest the North American Free Trade Agreement, part of a hemispheric coalition to fight against corporate capitalist incursion into public education. The organization holds regular convenings to share movement knowledge. In Stark and Spreen's review of recent global educator movements, "educators across the globe systematically challenged neoliberal austerity policies in 2018 and 2019" in Zimbabwe, Morocco, New Zealand, Brazil, Iran, Chile, Argentina, Mexico, the UK, Tunisia, Poland, Costa Rica, the Netherlands, Guyana, Jordan, Canada, the US (including Puerto Rico), and more (245).

Transnational educator and social movements have long grappled with the question of the state. In Mexico, the Coordinadora Nacional de Trabajadores de la Educación (CNTE) emerged in the southern states in the 1970s as a grassroots, radically democratic, and militant alternative to the state-controlled SNTE. In the US, social justice caucuses emerged in many major urban centers as educators envisioned rank-and-file-led union movements that could attend to educational and intersecting justice issues affecting their students' and communities' lives.

Further, social movements, like Brazil's Landless Workers' Movement (MST) and its educational "real utopias" (Tarlau "Occupying Schools") or Mexico's Zapatista movement offer further insights into both the possibilities and limitations when labor and social movements collaborate with or confront the state—or engage purposeful strategies that undertake both to try to achieve their visions and demands. In our discussion of these North and South American examples, we highlight how movements' various relationships to the state have evolved through specific historical and political conditions and offer a transnational lens for understanding this question in the context of the 2018 strikes.

● Social Movements and Dual Power Institutional Participation

Rebecca Tarlau, in *Occupying Schools, Occupying Land: How the Landless Workers Movement Transformed Brazilian Education*, engaged a multi-year political ethnography within the *Movimento dos Trabalhadores Rurais Sem Terra* (MST), or Landless Workers Movement, in Brazil. She recounts the movement's thirty-year "long march through the institutions" (5). Emerging in Brazil's rural countryside, the MST initially aimed to redistribute land through occupation and reform with three main principles situated within a broadly anti-capitalist and socialist politics: land reform, agrarian reform, and social transformation. To address the latter aim, the MST first turned its energies to popular education efforts. As the MST grew (from a few rural regions in the 1980s to twenty-three of Brazil's twenty-seven states currently) and collaborated with state institutions, the movement shifted and broadened to transform public education. The movement demanded "communities' right to participate in the governance of these schools, with the purpose of promoting alternative pedagogical, curricular, and organizational practices" and to create schools as sites that could grow and sustain their movement (5).

MST, as one of the largest social movements in Latin America and the globe, comprises a large network of regional and statewide collective leadership bodies across the nation. In the context of its educational struggle, the MST engages in movement-expanding pedagogical work via "teacher trainings, conferences, bachelor's degree programs, nonformal educational offerings, and other initiatives that teach activists and teachers about the movement's pedagogical and agrarian vision" (Tarlau 212). The question of the possibilities and limitations for movements' engagement with state institutions has a long history of analysis and insight within social movement literature. In the book, Tarlau challenges and aims to nuance prevalent theories within this literature, including Frances Piven and Richard Cloward's influential perspective that "movements inevitably become more conservative and less effective as they institutionalize" (7). Tarlau engages a Gramscian theory of the state as "an assemblage of organizations, institutions, and national and subnational government actors that often have contradictory goals" and which rely on political hegemony (or the consent of civil society) to govern (5). As an illustrative example, many public education systems have the contradictory goals of both "labor market preparation and democratic citizenship," even as, under neoliberalism, these have become increasingly conflated (Lipman 14). Contradictions exist, also, at various scales of governance, as various parties and actors engage in the everyday practice of translating these goals within their specific local and institutional contexts.

Tarlau argues that activists can utilize their social vision within the framework of state institutions while recognizing these contradictions, as those in the MST have. Further, various local and state governing bodies may be weaker or stronger and may have more or less sympathetic politicians in office that can

determine the movement's strategies for engaging in collaboration or confrontation. MST's practice of "contentious co-governance" involves a multi-directional relationship between the movement from below, collective leadership, and institutional engagements to implement and experiment with ("prefigure") the movement's social vision ("Occupying Schools" 5). In such a framework, social movements, like the MST, combine a strong grassroots organization with strategic institutional participation (e.g., partnerships with state institutions or organizations, electoral campaigns).

For the MST, co-governance is possible because of its strong social movement infrastructure and decades of cumulative movement knowledge. Even so, as Tarlau describes in-depth, contentious co-governance prefiguration, or the practice of strategic engagement with state institutions is messy, uneven across different geographic scales and political contexts, and complex. Further, it is situated within specific political and historical conditions. In Brazil, the MST had long had a relationship with the Worker's Party (Partido dos Trabalhadores or PT) a Marxist and socialist political party that maintained a hold of Brazil's presidency from 2002–2018 until its shift right with the ousting of PT's Dilma Rousseff and election of the ultra-right Jair Bolsonaro as president. The left-coalition PT party emerged out of opposition to the Fifth Brazilian Republic, a brutally repressive military dictatorship that governed the nation from 1964–1985. Out of the movements that emerged to form PT, among other social movements, Brazilian municipalities have a history of participatory budgeting and governance that have created specific conditions for MST's engagement in strategic, contentious co-governance (Tarlau, "Occupying Schools").

Social movement scholars like Sonia Alvarez use the phrasing dual strategy, where movements work simultaneously against, within, and without the state. As a major example, throughout two decades, MST developed and sought the strategic institutionalization of a national educational proposal for public education in rural Brazil, *Educação do Campo*. In the late 1980s, the call for the movement to support education came from families occupying land in camps and settlements who desired formal access to schooling (73). Throughout the 1990s and 2000s, MST's education sector evolved through its local, regional, state, and national collective decision-making bodies to advocate for educational policy and through the development of university partnerships to develop bachelor's degrees in "geography, agronomy, and pedagogy" (153). A proposal emerged that sought to expand these initiatives.

As Tarlau writes, "The phrase 'Educação do Campo (Education of the Countryside)' was deliberate, indicating a proposal not simply in the countryside or for rural populations but, rather, a proposal of those rural populations, implemented by them according to their realities" (164). As the proposal was adopted to become the Brazilian Ministry of Education's official approach to rural education, Tarlau details the challenges and limitations of MST's efforts over time. The official proposal was a far cry from the MST's and other coalition groups', including unions and other civil society actors, original vision rooted

in a Freirean-socialist framework. In large part, this had to do with the ways in which MST's institutionalization of the proposal expanded quickly, providing opportunities for key institutional actors to co-opt movement leaders and demobilize movement participation in the effort. However, Tarlau writes that even as the proposal lost its connection to a socialist agrarian development model (to that of one supported by capitalist agribusiness), *Educação do Campo* made a significant impact on rural communities' access to quality education and "legitimiz[e]d the idea that rural schools should have a differentiated educational approach than urban schools and creat[e]d dozens of educational programs specifically designated for rural populations" ("Occupying Schools" 216-217).

● Horizontalist, Anarchistic Structures of Power and Anti-Collaborationism

As Tarlau notes, activists and movement thinkers have debated the efficacy of state institutional participation. The histories and ongoing social movement efforts and organization of Mexico's grassroots democratic teachers' movement, CNTE, and the Zapatista Army of National Liberation (EZLN) offer a different perspective on the question of state power. Both the democratic teachers' movement and the EZLN emerged from the longer histories of social movements in Mexico's southern states. The EZLN of Chiapas and CNTE, which emerged from and remains the strongest in the states of Oaxaca and Chiapas, both have roots within Indigenous peasant, land struggle, and rural militant labor movements in the 1960s and 1970s (Cook; Vergara-Camus). Unlike the MST, both organizations within different social contexts have taken far more left-libertarian approaches to organizing and perspectives on the role of collaborating with and/or collectively pressuring state power in achieving their respective social visions.

Often, EZLN is compared to the MST as an example of a movement that went in the opposite direction, rejecting any state or institutional participation and seeking to build counter-institutions beyond the state (Tarlau "Occupying Schools"). As Vergara-Camus explains regarding the differences in approach between the MST and EZLN, in particular, "[F]or these social movements, the question of state power is a very practical one. It is a question to be approached by taking into consideration the actual history of national state formation and the concrete experience of each movement with the state" (430). Whereas MST was formed and coalesced under similar conditions as PT and found within PT an opportunity for contentious co-governance, the EZLN had a very different history with state repression. "After forty years of broken promises and betrayals from state officials, Indigenous subsistence peasants have come to see the state as the main class enemy. . . . The Zapatistas rejection of state power and their decision to build forms of self-government derives as much from this experience as from an ideological reflection on how best to radically transform society" (431). MST's power, according to Vergara-Camus, relied on the state to expropriate

land for their agrarian reform demands. While MST has confronted the state in the past, it must continue to negotiate alongside it at other times, always working within and without/against the system.

The EZLN began in 1994 as a guerrilla organization in the remote Lacandona jungle. Whereas Brazil's transition from dictatorship to liberal democracy included a left-wing political party that was, at least initially, relatively accountable to the social movements that brought it to power, in Mexico there was no such equivalent. Mexico was in effect a single-party state for seven decades as the Revolutionary Institutional Party (PRI) maintained control over the political system of the nation. By 1988, a split occurred within the PRI among the neoliberal camp and the nationalist camp. The nationalist camp, led by the popular Cuauhtemoc Cardenas, broke with the PRI to build the Democratic Revolution Party (PRD), and by the close of the decade, most other left-wing parties had been subsumed within it (Vergara-Camus). Although the PT in Brazil emerged as a result of popular struggle against the military dictatorship, combining social movements with militant labor struggles, the PRD did not emerge from similar circumstances and thus lacked a popular basis of support among the diverse groups within Mexico. The PRD's electoral route dominated the party, and its leaders co-opted grassroots organizers that had helped galvanize its initial break from the neoliberal PRI.

Initially, the EZLN attempted to work with the left-leaning PRD in its resistance to the PRI's Ernesto Zedillo administration (1994–2000). In their "Third Declaration of the Lacandona Jungle," the EZLN organized resistance with the PRD through their creation of the National Liberation Movement (MLN). This proposal refused to recognize Zedillo's government and sought a constituent assembly to replace it, governed by the masses in their localities. Within a year, the MLN had fallen apart. The PRD watered down proposals of insurrection and downplayed the calls for revolution. The party's goals were limited to opposing neoliberalism in form but not in function. In response to the MLN, Zedillo's neoliberal government provided a salve that pacified the PRD and broke its relationship with the EZLN. Zedillo announced that he would enact electoral reform, giving public funds to electoral campaigns, thus aiding the PRD in its future as a political party (Vergara-Camus). Ironically, Zedillo's government would most likely not have made this reform had it not been for the temporary alliance that brought EZLN and the PRD together, yet it was this compromise that ended up splitting the two. The PRD believed this compromise would give them an opportunity to undermine Zedillo and the neoliberal PRI. They redoubled their efforts at the ballot box and became further estranged from the EZLN in the process.

The following year (1996), EZLN pressured Zedillo into a series of negotiations known as the San Andres Accords. The Accords were intended to lay the groundwork for the constituent assembly that was the initial demand of the MLN. In it, EZLN demanded greater rights for Indigenous peoples in southern Chiapas, including rights to culture, women's rights, and an end to hostilities with the Mexican state. Indigenous scholars from across Mexico attended the

Accords meetings, and at the time, it appeared that EZLN's move to work as an outside force agitating for more liberal reforms would be successful. The Zedillo government signed the San Andres Accords and by the end of 1996, draft legislation from the meetings were being created to protect Indigenous rights and autonomy of the land. One month later, in December 1996, Zedillo rejected the legislative drafts and used the power of his office to quell EZLN negotiations between themselves and other Indigenous movements during negotiations. Zedillo cut EZLN off from the rest of Mexico in effect. Their goals were seen as limited to the Indigenous peoples of Southern Mexico. By 1998, EZLN had outright rejected the institutional political path towards social change, instead opting for a combination of insurrection and peasant organizing to force the federal government's recognition of the Accords (Vergara-Camus).

CNTE and the democratic teachers' movement, likewise, emerged out of the specific political-historical relationship with the state-controlled national teachers union, SNTE. At the time of its formation in the 1980s, rural normal schools (teacher education institutions) comprised a significant percentage of Indigenous bilingual students in training to become teachers, many with strong connections to and histories with social movements. In 2010, Elba Esther Gordillo, president of the SNTE and major PRI politician, called these rural normales "guerrilla seedbeds" and efforts had been underway since the 1960s to close or restructure them (Padilla 24). The Mexican government considered them "leftist political centers" (Bocking 91). Like the EZLN, CNTE's approach to the question of the state has been decidedly anti- collaborationist, instead seeking to build a "sustained capacity for disruptive protest while avoiding electoral engagement, fearing co-optation and a loss of autonomy" (Bocking 390).

In the US and Mexico, the 1980s through the 2000s saw a sharp decline in unionization. While Canada's relative culture of social democracy contributed to the maintenance of its overall union membership, in all three countries, union militancy declined, and transnational neoliberal policies took hold. CNTE offers an important exception, orchestrating one of Mexico's largest national educator strikes in history in 1989. Educators struck and protested from across the southern states (Oaxaca, Chiapas, Michoacan, and Guerrero) where CNTE has historically held the most participation and influence. Significantly, educators in Mexico City joined the action, led by women primary school educators of SNTE's Section 9, its largest local (Bocking; Cook). While in more recent years, the CNTE has had more limited participation and influence in Mexico City, urban social movements for housing rights emerged from the poor state response to a devastating 1985 earthquake, creating a new culture of dissidence toward the ruling neoliberal PRI. During the 1989 national strike, educators occupied city streets and the SEP offices, and won twenty-five percent wage increases, and in Section 9, Oaxaca, and Chiapas, free and fair elections for state education executives (Bocking 108; Cook).

While it has lost its influence in Mexico City, CNTE continues to remain strong in the southern states. Scholar of the movement, Maria Lorena Cook,

argues that CNTE's longevity and successes has been its commitment to participatory, democratic processes that helped maintain the momentum of a mass movement and mitigated the corrosive effects of internal conflicts. "The development of functioning school and district-level committees which elect delegates to state assemblies, helped ensure the movement could continue to function were it to lose control of the formal machinery of the union. This is how the CNTE functions in states where it has the support of a critical mass of teachers but lacks institutional control of the local" (paraphrased by Bocking 109; Cook 193-196, 216- 265).

After CNTE's successful 1989 strike, Elba Esther Gordillo was appointed the president of the SNTE and became a strong advocate of neoliberal educational policy, including "datafication," limiting the professional autonomy of teachers in the classroom and teacher educators in the nation's normales. Gordillo worked to curb the militancy of CNTE, specifically in Mexico City, by "welcom[ing] many Mexico City dissident leaders into full time union positions for Section 10 and at the national office. Others were vaulted above the standard career steps into school directorships" (Bocking 110).

These unique circumstances in both Brazil and Mexico during the period of intense neoliberalization shaped the collective experience of Indigenous rights organizations in their relationship to state power. Brazil's MST worked within and within/against state institutions to enact social movement aims yet experienced neoliberal incursions. Coming out of the military dictatorship, both the PT and the MST worked in coalition periodically to achieve democratic reforms that benefited poor peasants in their efforts at land reform. The victory of the PT was tied to the social and labor movements of Brazil in ways that the left-leaning PRD in Mexico never truly was (Vergara-Camus). In Mexico, when the PRD reneged on their promises to work alongside EZLN, the latter found that the state would be in perpetual class war with the peasant class and thus sought alternative modes of organizing resistance. MST's trajectory towards co-governance and institutional participation emerged through its historical relationship with the Marxist-socialist-leaning PT. Meanwhile, EZLN's trajectory towards anarchistic structures of power outside the state and, similarly, CNTE's refusal to collaborate with the state emerged from specific histories and experiences with electoral reforms (Vergara-Camus). For each, its orientation and relationship to the state is premised on the strength of its grassroots, collective organization beyond the state and its responsiveness to its participants and members.

● Contemporary Education Labor Movements in the US: Grappling with Questions of Power and Change

Different than in either Brazil, Mexico, or Canada, the US has been the primary exporter of neoliberal policy experiments, as "many of the key actors, including philanthropists and corporations promoting the for-profit education industry,

come from the United States” (Stark and Spreen, 234). In the US, for Shelton, the decline of (relative) state support for robust labor unions (labor liberal capitalism) and the rise of neoliberal capitalism (individual competition in a free market) were premised on a confluence of specific factors that shaped urban places during the height of educator militancy amidst the political and economic crises of the 1970s (Shelton). In urban places during the 1970s, Shelton argues that US teacher strikes in deindustrializing cities facing declining tax revenues “exacerbated an already overwhelming sense of crisis in the decade” (195). During this sense of crisis, “political networks from the right . . . tapped into long-standing racial conflict, cultural assumptions about ‘productive’ citizenry, anxiety about shifting gender roles, and the beliefs of much of the White working and middle class that the state victimized them during a tough economic climate” (195). With waning Democratic investment in labor in the decades since, neoliberal educational policy and governance has generally had bipartisan support among both Democratic and Republican politicians. Republican- and Democrat-controlled states have pushed for school choice and privatization, high stakes standardized testing and curricular regimes that punish under-resourced schools and communities, teacher merit pay reforms, and more (Buras; Lipman).

Values that took hold and undergird the common sense of neoliberal policy suggest that “those who worked the hardest and produced the most deserved the most rewards,” and “only individual competition in the marketplace—not collective organization or social policy—could provide it” (Shelton 195). Shelton argues the decline of educator militancy in the 1980s and 1990s is intimately connected to many (White) worker’s internalization of producerism—and that producerism is inextricably entwined with the construction of Whiteness. Weiner adds that the predominance of paternalistic and hierarchical business unionism has created barriers to rank-and-file voice and power within their unions. For Weiner,

[D]espite their all-too-glaring problems, teachers unions are the main impediment to the neoliberal project being fully realized. Even when unions don’t live up to their ideals, teacher unionisms’ principles of collective action and solidarity contradict neoliberalisms’ key premises—individual initiative and competition. Neoliberalism pushes a “survival of the fittest” thinking. Labor unions presume people have to work together to protect their common interests. (“The Future of Our Schools” 9)

For Weiner, social movement unionism requires rank-and-file democracy, solidarity with (and deep understandings of the interrelatedness of) entwined social justice movements, and, importantly, an internationalist approach. “Neoliberalism’s devastation of public education is a global epidemic that requires a global cure” (“The Future of Our Schools” 53).

Many scholars trace the resurgence of educator militancy in the past decade or so to the emergence of social justice or movement unionism, or a form of unionism that seeks to understand the relationships between schools and racial, economic, gender, immigrant, and other forms of justice. Social movement

educator unionists have engaged deeper questions about what issues their unions should fight for. Through doing so, they have challenged producerist ideologies in public education and beyond.

An emerging body of literature on the rise of, particularly, urban social movement educator unionism and activism since the 1990s has sought to capture the conditions and internal organizing under which, in particular, urban social justice caucuses formed to challenge the prevalence of collaborationist unionism that has enabled the neoliberal turn and its impacts on public education (Asselin; Benson; Bocking; Brown and Stern; Maton; Morrison; Shiller; Stark; Stark and Maton; Uetrict). Stark's four-year militant ethnography documenting the formation of the United Caucuses of Rank-and-File Educators (UCORE) from 2015–2019 provides key insights into the ways in which U.S. urban educator activists and organizers have sought to build a national movement to revitalize and transform their unions, schools, and society along social justice principles.

Stark traces the emergence of social justice caucuses, or groups of educators within (or even outside) a union that work to steer its priorities and resources, to a 1994 meeting of the National Coalition of Education Activists (NCEA), out of which emerged a document that detailed key principles of social justice unionism, “committed to a bottom-up, grassroots mobilization—of teachers, parents, community, and rank-and-file union members” (Peterson, “A Revitalized Teacher Movement” 16). Models of social justice or movement unionism had been underway in different places previously in the 1980s and 1990s and cohered and found new articulation in the context of the NCEA meeting. Stark writes that the influential NCEA document drew on past traditions of social movement and community-based unionism:

[The NCEA document] mirrored some of the strategies and tactics of more radical teachers' unions, including the democratic governance and economic justice work of the Chicago Teachers Federation (CTF) under Haley, the racial justice pedagogies and common good demands of Black educators in the pre-Brown South, the anti-racist community organizing of New York's Teachers Union (TU), and the militancy of rank-and-file organizing in the “long seventies.” (20)

In the decades since, the NCEA principles have foregrounded those of educator organizers in emerging social justice caucuses and caucus networks.

In the past few decades, social justice caucuses formed in Chicago, Seattle, Los Angeles, Oakland, Newark, Philadelphia, Baltimore, New York, and more. In each of these contexts, social justice caucuses were commonly born out of educators' involvement and training within local social movements and educational struggles. In Chicago in 2008, CTU members organized in solidarity with the Kenwood Oakland Neighborhood Organization's struggle against school closures in predominantly Black neighborhoods and the pushout of educators of color. Finding intransigence within the larger union to support the efforts, educator organizers formed CORE (Stark 25). They drew on their experiences in the

struggle to engage in a community-based, grassroots strategy for mobilization that led to their success in winning the leadership of CTU in 2010. In Oakland, the social justice caucus, Classroom Struggle, emerged out of the education committee for the city's Occupy movement in 2011, which occupied Lakeview Elementary School (slated for closure) and organized more than twenty percent of educators to participate in a one-day general strike and march (Stark 29). In each of the cities, these caucuses shaped their efforts around fighting against resonant neoliberal reforms that continue to reshape, resegregate, and displace Black, Brown, Indigenous, and working-class communities in urban places (Lipman).

Stark found that, while social justice caucuses engage in various situated strategies and practices, organizers emphasized common collective approaches, like building democratic rank- and-file power. As Massachusetts' Educators for a Democratic Union (EDU) caucus describes: "union power manifests primarily in the organizing activities of empowered rank-and-file members, not through lobbying elected officials" (123). Further, caucuses have emphasized building rank-and-file power via "community collaborations," locally and within school buildings (125). Social justice caucuses also tend to find common purpose in transforming their unions to "fight" for their members and for schools that communities deserve (126). Finally, social justice caucuses work toward "advancing justice in their schools, whether through grassroots organizing, labor struggles, policy advocacy, or progressive pedagogies" (129).

Stark illuminates that key tensions exist among organizers around how to engage or understand state institutions in their work. Caucus organizers engage tensions between union democracy, within unions that, in most places, comprise predominantly White educators, and social justice principles. Within caucuses, organizers may disagree on what social justice issues are education or caucus issues (e.g., policing and police brutality (Asselin)). Without serious engagement, such tensions can lead to the marginalization or push-out of educators and communities of color, as Louisville, Kentucky educators experienced after disagreements about the significance of the Gang Crime Bill to the educator movement. As many social justice caucuses have run and/or won slates of candidates for their union's leadership, they grapple with tensions between union democracy and conceptions of social justice on a broader scale with the wider union membership. As Asselin has documented in her study of MORE and WE, these tensions can be opportune sites of pedagogical engagement—whether undertaken internally via educator study and inquiry groups or meetings, or externally through the discursive and educative work of caucuses' activities and campaigns (e.g., caucus organizing for the National Black Lives Matter at School Week of Action).

The development of social justice caucuses offers important context for a growing disillusionment with the concessionary business models that still predominate most educator unions. Through caucus networks and meetings, educator organizers have learned with and from transnational educator movements. Yet, as Stark describes, there are important regional differences in contemporary

educator movements in the US that suggest the importance of understanding the militant educator movements in West Virginia, Kentucky, Oklahoma, and Arizona. While educators in these states pushed for demands that emphasized economic justice, “only strikes in urban, left-leaning locals such as OEA [Oakland Education Association] (led in part by members of the Classroom Struggle caucus) and UTLA (led by the Union Power caucus) emphasized racial justice demands” (Stark 140). While the major urban strikes in 2018 and 2019 were tied to collective bargaining, the statewide strikes were tied directly to specific state legislation and were undertaken with the tacit support of most public school administrators and school boards. In the “red” states, major political and geographic differences exist in the relationship between more progressive, racially and economically diverse, yet smaller urban areas and with generally more conservative-leaning, predominantly White- and conservatively-governed rural communities. While urban social justice caucuses tend to understand collective bargaining as a means, rather than the end, to organizing for social justice and the common good, the “red” state strikes emerged in places with strong anti-union legislation that has weakened unions’ capacity to bargain, if they have a legal right to do so at all.

These differences, among others, offer important context for how different educator movements have engaged, implicitly or explicitly, the question of the state, and require a more sustained analysis, as we turn to next.

● West Virginia United: Syndicalism and Anti-Electoralism

West Virginia had been a blue state until only recently. Democrats controlled both houses of the state legislature from 1933 until 2015, and the governorship from 2001 to 2017, the year that Jim Justice switched his political party back to Republican. Between 1950 and 2010, a majority of U.S. House of Representatives members from the state were Democrats. “Democrats have been in control for eighty years and look where it got us,” said educator organizer Jay O’Neal about the political impact of the 2018 walkouts. “Union leadership tells us to ‘Remember in November’ and everything but yeah, we might not have as many direct attacks, but we wouldn’t be in a teaching Mecca because Democrats are in power.” O’Neal’s statement about the disconnect between union leadership’s perception of power and the perception of WV United, the social justice caucus that emerged from the 2018 strike, explains the difference in these two approaches to the state. Whereas union leadership returned to business unionist approaches and elections post-strike, O’Neal thought the caucus could better spend its early and limited time by building rank-and-file power.

Every West Virginia educator we interviewed stated that the walkouts did, in some way, awaken a political consciousness in the state’s teaching workforce. “People are paying a lot more attention now,” Emily Comer said.

Teachers in my building are reading the news more and paying attention to education issues, and that's just not something that happened before the strike last year, at least not until the lead up to it. Teachers rarely talked politics at work, but now it's something that happens all the time. Teachers in my hallway now know who the individual legislators are and that's really cool, there's a big difference there now.

Similarly, West Virginia educators, Adam Culver explained,

Being a teacher, you realize that most teachers are not political. State Senator Ojeda said it to us flat out in Cabell County that, "I know you got into this job thinking you had the least political job out there, but you actually have the most political job out there." Most teachers think they just have their content area they teach because that's what they enjoy the most, and they don't think about the politics of it all, they're focused on the content of what they teach but not the politics of how they're teaching.

Within our interviews, descriptions of educators' political awakenings encompassed a range of implicit meanings, from their awareness of legislative policy impacts on educators' work to learning from experiences of collective struggle how power operates and social change works.

In *Cultures of Solidarity*, Rick Fantasia argues, "Solidarity is created and expressed by the process of mutual association. Whether or not a future society is consciously envisioned, whether or not a 'correct' image of the class structure is maintained, the building of solidarity in the form, and in the process, of mutual association can represent a practical attempt to restructure, or reorder, human relations" (11). The forming of labor unions and the use of rank-and-file organizations within unions expresses inherently anti-capitalist beliefs since capitalism has individualized our notions of self and self-interest. Yet, educators' willingness to transform society through acts of associated bonding is no less meaningful. Cultures of solidarity supports workers to see in the system a flawed relationship (e.g., labor laws intended to negotiate peace) and to see within themselves the capacity to enact more liberatory modes of relating in the world.

Ohio County Education Association President Jenny Craig found that the walkouts awakened a sense of worker consciousness, rather than simply a trade union consciousness. She stated,

Now teachers are seeing themselves as part of a larger whole, that we're workers and that we have something more in common with one another. You saw that after the strike because we started to collaborate with other unions more and we were more a part of the community, which is why we have been so successful. . . . Teachers didn't see each other as a key part of that larger whole, that all workers need that solidarity, and when the [WV United] caucus came to be, I think that really came to be a driving force for locals to understand how to make community allies and be purposefully a part of the community and other labor groups.

At the end of the 2018 West Virginia walkouts, the Communications Workers of America (CWA) Local 142 in West Virginia went on strike against Frontier Communications. Fourteen thousand union employees struck for three weeks protesting a contract that would reduce full-time employment, increase temporary employment, and increase health insurance costs. The strike was successful, and a new contract ensured layoff protection for one hundred percent of Frontier's employees (Young). Simultaneously, two separate unions at Technocap, a metal enclosure manufacturing plant in Glen Dale, struck over contract disputes around health insurance premiums (Garland). Members of the Ohio County Education Association bought gift cards and stuffed backpacks of supplies for striking workers. This forged a sense of solidarity and bonding between the strikers and the community. "The teachers went down to help with the Technocap workers," Craig stated, "brought them gift cards, talked with them, and that wouldn't have happened without the walkouts. And now a lot of parents have this feeling of, 'I get it, this is systemic and we need to help one another.'" Chris, a Frontier worker, shared, "If all the teachers band together, and the same for us, if all the communication workers band together, there's no fight we can't win. All we want here is to take care of our families, and provide them with great, affordable health care."

The purpose of building up this labor movement via acts of solidarity was not to transform the electorate, but to shift the power between government, businesses, and workers. In the 2018 midterm elections, Republicans retained control of both houses of the state legislature and all three U.S. House races were won by the GOP in landslide victories. Only Democrat Joe Manchin won his race by a slim margin. Comer reflected on the midterm elections and the caucus' role in this fight:

The outcome showed less for us and more for the Democrats who ran, because more people probably would've voted for the Democrats if they had a reason to, if they had actually spoken to people about issues they cared about, and I don't think they did. So for us putting pressure on them, that can play a part in that. I don't think the caucus should be in the business of getting Democrats elected. We're here to make sure PEIA is funded and that we smash any legislation related to privatization or charters and that we're defending public schools. It's not our role to get Democrats elected; it's Democrats' job to get Democrats elected.

As new power players in the grand political scheme, WV United could have chosen the route of electoralism. Similarly politically-motivated educators had chosen to do this when, in the months following the 2018 walkouts, a group of educators formed the "Future of 55 Political Action Committee," whose mission is to support and elect pro-education political candidates through endorsements, lobbying, and fundraising. A debate began soon after about what role the newly-formed caucus should play in the upcoming election. Some believed that an endorsement from the caucus would help get some of the newly-minted, pro-education Democrats elected, and flex the muscles of the caucus as a legitimate

organization. Others, however, believed that endorsements and traditional political campaigns were an unnecessary use of caucus time.

“A campaign is a time suck,” O’Neal said, “and there’s no guarantee that you’re going to win, and almost always, people here will be Democrats, but they’ll never have the funding that the Right has so you’ll always be outspent, and it just felt like there would be a better use of our time to be organizing our co-workers and building strength that way.” Remaining outside of the electoral sphere proved to be the best option for the caucus, ultimately. “I think it helped that we didn’t formally jump in as a caucus to any kind of campaign or endorsing candidates,” O’Neal said. “That made us a little more independent in some ways and allowed us to jump in with a different focus and really push that.”

After the election and the realization that the Republicans would maintain control of the legislature, WV United’s independence from the Democrats made an impact. A second strike was in the works. Many of the issues facing educators in 2018—a permanent fix to the PEIA and significantly higher wages over several years to compete with neighboring states—never materialized. Everyone interviewed for this project from West Virginia stated that, in hindsight, educators should have stayed out longer in 2018 to ensure that these issues were resolved through legislation, not promises. But the failed promises of the elected elite provided fodder for the next round of walkouts.

By January 2019, WV United had worked out a plan for building power leading up to the next legislative session. The caucus began to frame the next fight around increased mental health supports for students. One-third of children in West Virginia are raised by their grandparents, what some have termed “grandfamilies.” Grandfamilies make \$20,000 less than the average median household income in the state, increasing the state’s generational poverty. In counties where more than eighty percent of children are raised by grandparents, there is a correspondingly higher rate of opioid addiction. Nationally, West Virginia ranks forty-sixth for child poverty and fiftieth for child poverty for those under the age of six (Gutman). West Virginia schools have been severely understaffed to deal with the complex experiences and realities faced by students with little access to nutritious food, stable housing, among many other hardships. At the beginning of 2019, schools were operating at a sixty-six percent efficiency standard for student-to-counselor ratios. Likewise, public schools were at an abysmal twenty-three percent efficiency standard for student-to-psychologist ratios (Gutman). Considering that more than one in four students in West Virginia have suffered from some form of childhood trauma (Gutman), WV United educators sought to address these disparities directly.

Eventually, WV United members came to realize that the push in 2019 needed to center their demands against the legalization of charter school development when Senator Patricia Rucker, a former Tea Party activist and ALEC-sponsored legislator, was appointed as the Senate Education Chair despite having no previous teaching experience in public schools. The first task in shaping this fight toward social justice was to hold statewide walk-ins on the first day of the legislative session.

Twenty of the fifty-five counties participated in the State of Our Schools walk-ins. “The walk-ins related to charters and privatization were really important [that] year,” stated Comer, “because I think that at that point most people didn’t know what was going on with charter schools. That was happening around the same time as the UTLA strike, but our caucus did a good job of educating people about what was happening in LA and what charter schools were doing to LA and what UTLA was doing to fight back, but also why we couldn’t let charters enter West Virginia.”

As happened in 2018, the unions held several rallies in advance of an impromptu two-day strike that shut down fifty-four of the fifty-five counties. The House of Delegates voted to permanently table SB 451, the bill that would have allowed charter school development, and the strike ended quickly. Comer stated, “The walk-ins and awareness that our caucus brought to the issue of charter schools played a huge role in defeating charter school legislation through the strike. I don’t think that would’ve happened without the caucus.” Brian Bowman, another West Virginia educator, stated similarly,

I remember posting something asking people about what charters were, and most people said they didn’t [know], and that continued for educating people about what these issues were and the work that Terri [a member of the caucus] does, about what charters do, what ALEC does, what the Cardinal Institute [a Koch-funded think-tank in West Virginia] is, how these companies will benefit from these privately-owned and operated entities is instrumental. And it’s important to push for a walkout and organize and sharing what corruption is happening within the unions when poor decisions are made. And this brings in new members who are disaffected and angry at what they’re seeing. They want an open and democratic process, and they see a lack of that in the unions.

In lieu of endorsing candidates who could have defeated SB 451, WV United believed that building independent worker power was of primary concern. As Bowman’s statement above suggests, membership concerns were more precisely targeted at building dual power, or rank- and-file organization as a caucus within the union, to combat both the intransigency of union leadership as well as the ineffectiveness of politicians and elected officials to block charters long-term.

Independent, autonomous groups began organizing food projects to ensure low-income students did not go hungry during the duration of the 2018 walkout. In 2018, the WVPEU group had no centralized leadership, dictating actions or coordinating mass efforts across the state. Countywide groups were set up as impromptu methods of coordinating actions locally, and schoolwide groups developed alongside this to provide similar efforts within individual schools. Local presidents were often at the mercy of the majority, as was shown in the wildcat action that took place following Governor Justice’s “cooling off” day, which took union leadership and elected officials by surprise.

The WV United caucus, then, built off these efforts and designed their caucus to reflect the strength of local, horizontal organizing methods. Refusing an

endorsement process was the first move that the caucus made to avoid an approach to building power that relied on relationships with the state. “I think it’s a good goal to get politicians behind your concerns,” Bowman shared, “but when it comes to endorsements from the caucus, it’s extremely important to keep an organization like the caucus as non-partisan as possible. I’m not saying it isn’t impossible because we waded into those casual conversations, but I have always said that if we bring in people of various political viewpoints then that’ll make us much stronger.” Secondly, the caucus relied on locals to set up their own process for walk-ins at the beginning of the 2019 legislative session. Individual organizers with or without ties to union leadership could set up a walk-in at their school. This process reinforced the belief that the caucus instilled early on that every member is an organizer, and every organizer can do the work of the union.

When union leadership formally called the 2019 walkouts in protest of SB 451 (Student Success Act), workers had been educated in their rights to demand direct action via the 2018 wildcat strike and the political education work of WV United. Once again, the southern coal counties had voted right away to endorse a statewide walkout. The walkouts centered around issues that developed organically from the base to the union leadership. Yet again, the strike succeeded because workers knew their fight could unite educators against the efforts of a retaliatory legislature.

Decentralized leadership within locals and school sites were key for educating the public about the effects of charter schools and their ties to neoliberal policies of privatization and defunding of public resources. WV United’s steering committee provided resources for others to use but acted more as a general clearinghouse of information that they could disseminate to others, including infographics, videos, and written reports. Through this process, the caucus relied on the pre-established structure that had been created in 2018 to share information rapidly and democratize actions in the lead-up to another statewide strike. The caucus gained legitimacy by encouraging others to take actions they felt were necessary.

WV United engaged in practices that resonate strongly with traditions of anarcho-syndicalism, developing out as it did in a horizontal and democratic movement. According to Immanuel Ness, common features of syndicalist unions include that workers: advance actions, rather than union officials or bureaucrats; oppose collaboration with management; exert independence from electoral politics and political parties; form a culture of worker solidarity within the job itself as well as local communities; commit to and practice horizontal and democratic union structures; withhold their labor as a “principal strategy” to transform their conditions; and oppose collective bargaining agreements that prohibit workers from taking direct action (5-6).

Political education on the significance of direct action became important. Matt McCormick believed this process served multiple purposes:

We need to be able to keep people informed enough at the ground level, and if it gets bad and we need to walk, we need to walk, and if we’re together at the grassroots level, we can shut it down and effect change.

It doesn't matter who is in power, friendly or hostile, if they're doing something against public education, we can shut it down. . . . This is the best tool we have. This also shows that this is a bigger issue than a teacher or non-teacher issue, so we need to keep calling meetings where we open up meeting spaces to all educators, regardless of membership or non-membership. It transcends the petty politics of what the state-level unions try to do. . . . At the end of the day, we have to be ready to say we don't care what the state leaders want but our members know what we need and we will do what our members want and what our members need. The same kind of grassroots movement that led us on a grassroots strike [in both years] is the same type of organizing that'll help us against a state leadership that we can't always trust.

Red for Ed days, described in Chapter One, highlights the class politics of the caucus in its early stages. Signals of worker solidarity predominated in both 2018 and 2019 as education workers donned shirts, buttons, and posted pictures of their schools coming together as one either in support of bread-and-butter concerns (2018) or in opposition to charter schools (2019). Through this, the sense of community involvement grew and expanded, with social and economic justice union politics becoming a mainstay in the caucus' organizing principles.

Given that West Virginia is a right-to-work state and public employees have no legal right to collectively bargain a contract, any concessions made by the state to public employees must be done through lobbying or direct action. WV United's reliance on direct action over lobbying was a political decision as much as it was a strategic one. Hostile Republican majorities in both houses and the Governor's mansion in 2018 and 2019 meant that lobbying would have weakened and diverted grassroots mobilizations when other actions were necessary. As O'Neal so aptly put it, "Strikes work! Direct action works!"

SB 451 was ultimately defeated, due again in no small part to the rapid mobilization of everyday workers across all fifty-five counties and a two-day state-wide walkout. It would, however, be resurrected in a watered-down form over the summer during a special session of the legislature. HB 206, an education omnibus bill that established local protocols for the creation of charter schools, passed successfully despite intense pressure from the unions. "We learned that rallies are one thing," O'Neal stated, "and strikes are another. The legislature will get mad when they see people showing up *en masse*, but they don't fear them. That's the difference between a rally and a strike."

WV United organizers reflected on the limitations of allowing union leaders to make the call to strike. "We should've stayed out [in 2019]," argued educator Josh Russell prior to the passing of HB 206. "I think that the state leadership did learn from the membership [in 2019] whereas last year [in 2018] they were trying to dictate to us, but lessons learned, I think we really should've stayed out but we got divided when the day two came and people didn't know whether to stay out, or go back, and that's the lesson we need to remember over the summer and fall."

“The strength of the union is not the number of members or the number of members who show up to a rally,” O’Neal said, “but the number of members who withhold their labor and shut shit down. That’s the power of a union and I feel like our union leadership has not had that set in. We don’t have collective bargaining and they’re not thought of as that type of union and we saw that briefly in 2018 and somewhat in 2019, and I want them to stay in that mindset, rather than focusing on rallies.”

In the summer of 2019, the education unions held several high-profile rallies at the capitol in their attempt to block HB 206. While the caucus was hoping for a pre-emptive call by union leadership for an August strike, as a bargaining chip against Republican tactics to pass an unpopular bill at a time when a strike was impossible to put into effect, leadership opted for calls to “Remember in November.” State AFL-CIO President Josh Sword at a rally that summer proclaimed, “Elections have consequences.” The notion that greater electoral gains would have halted charter schools long-term was the prevailing belief among union leadership, but for the caucus, elections mattered less than the strength built up through rank-and-file power and direct action.

The summer rallies illustrate the differences in how union leadership and the caucus understood power. At each successive rally, union leadership would send out a call for members to make the tedious trip to Charleston, day after day, without attempting to mitigate travel costs or subsidize housing to provide easier access for members traveling from across the state. Rallies began to have a set procedure to them during and after the 2018 walkouts that continued into the summer of 2019: leadership would call a rally and expect members to find their own transportation to the capitol, members would arrive early and enter the capitol building to either give testimony to the legislature or rally inside the capitol building, return outside for a short prepared speech by the leadership of various unions, and then be told to go home and rest so that they could return the following day for the same process.

Caucus members, on the other hand, understood rallies as opportunities to meet with the rank-and-file, gather contact information, and listen to and understand their concerns instead of dictating to them what they thought they needed to hear. “I think the leadership still has a very top-down way of looking at things,” O’Neal said,

I think they took the idea from the 2018 strike that we could change things with so many people at the capitol, and I remember when the first omnibus bill was coming out and people were talking about it but both AFT-WV and WVEA were saying, “We need a bunch of red shirts at the capitol,” when in reality it was that we withheld our labor *en masse*, but I think they still go to that idea of rallies and things, but it’s top down because there’s someone talking to you and telling you what to do. But you flip the script when you go around and hear people’s concerns and hear what’s most important to them.

The unions’ positioning of themselves as the legitimate heirs of the walkouts

conflicted with the caucus' growing militant base, nowhere more evident than in the summer of 2019. The caucus had conceded the decision to call for a fall walkout to union leadership and witnessed the effect of this concession: Without pressure from below, union leadership fell back to its conservative strategies.

"The old strategies aren't working," O'Neal emphatically said at the end of his interview with Brendan, "[direct action] is the way to make change."

● KY 120 and JCPS Leads: A Conflict in Power

The 2018 Kentucky walkouts had the possibility of building power with and for BIPOC communities of Louisville, the state's largest city and the oft-target for hatred by then-Governor Bevin. Described in Chapter Two, however, divergent ideas about how to proceed at the end of the 2018 legislative session with regard to the racist Gang Crime Bill resulted in a clash between Jefferson County educator-activists and the members of KY 120. The former demanded a continuation of the walkouts to block this harmful bill that would criminalize many of Kentucky's students and the latter siding with the KEA in calling off the strike indefinitely. The 2018 sickouts ripped open old wounds between organizer-leaders that had been simmering for years prior.

In Kentucky, divergent opinions of class power fell along racial lines. Black educator-organizers in Louisville and their allies, while favoring some components of electoralism, focused their activism on social justice unionism and actions that built alliances across grassroots, community-based organizations. These individuals often sided with the group JCPS Leads, a group that formed in 2019 after hundreds of Jefferson County educators critical of KY 120's handling of a one-day sickout in 2019 were removed from KY 120's social media and the ongoing marginalization of their racial justice concerns within KEA. Educator-organizers outside Louisville and their allies affiliated with KY 120, which emerged as a grassroots organization that later became functionally affiliated with the KEA. KY 120 eventually focused their activism on relationship-building with elected officials. The intersecting components of race and class discussed in Chapter Two influenced the contrasting theories of change that inform each group in practice.

Tensions between the role and extent to which each group should commit to election work grew out of the conditions each group saw in their own district. As Jeni Bolander stated in our interview, "... we realized that if we wanted some of the problematic legislators gone, we had to play the hand we were dealt. This meant putting forth educationally-friendly Republicans to run and friendly Republicans already in the legislature to help by giving us information or help us from the inside, and we found several." After the 2016 election, Republicans controlled sixty-two of the one hundred seats in the state House of Representatives, twenty-seven of the thirty-eight seats in the state Senate, the Attorney General's office, and the Governor's mansion.

Throughout the 1990s, the Democratic Party held trifecta control over the state government, much like in West Virginia. It wasn't until 2000 that

Republicans gained control of the Senate, and for a brief time between 2004–2008 for Governor as well. The “Trump effect,” however, gave Republicans trifecta control for three years from 2017–2019. If we break down for demographics where Democrats won their elections after 2018, fifteen of the thirty-eight Democratic House seats are in Jefferson County where Louisville is located. Another seven are in Fayette County, home to Lexington, the second largest city in the state. In total, fifty-eight percent of Democratic House seats come from the two major urban centers in Kentucky. This calculation contributed to KY 120’s understanding that working alongside Republicans was necessary, as an organization that had most of its membership outside these areas.

In the midterm elections, KY 120 endorsed sixty-eight individuals for state legislature races, including four Republicans. Of the sixty-eight endorsed candidates, twenty-one won. The concept of endorsements and lobbying was, for KY 120, a way to shift the balance of power within the legislature. “For us,” Brewer said, “it’s about respect. If we can get legislators who will think, ‘What will Nema say if I vote for this,’ elected, then that’s a win.” Brewer and, consequently, KY 120’s understanding of politics relied on a give-and-take, *quid pro quo* approach. Candidates for office would come to KY 120, request an endorsement, present their answers to any questionnaire they had, and then publicly support one another during the election. When asked how they would keep politicians honest after the election, Brewer stated that, “We remember people who worked with us and people who screwed us, and I don’t forget. You work against us, and that’s it, we won’t work with you after that.”

Functionally, KY 120 worked to take on the role of the KEA during and after the election as an unofficial representative of public employees. The legitimacy that they had gained during the 2018 walkouts carried over into the summer when district leaders met to decide the endorsement process for candidates. Candidates who received the KY 120’s endorsement could expect a large social media presence, which had been established during that year’s series of walkouts, and volunteer canvassers. Bolander believed the biggest success of this endorsement process was that it brought in so many new people to the political process, who would have otherwise been uninvolved in a midterm year. “You saw teachers getting involved by canvassing and making phone calls for political candidates,” she stated. “I knew plenty of people who started doing this for the first time; it was for me.”

Tyra Walker’s experience after the 2018 walkouts was very different from that of those involved in KY 120. As discussed in Chapter Two, Black educator-organizers, like Walker, were effectively cut out of much of the decision-making process for ending the strike. Their efforts to advance racial justice were characterized as “divisive,” part of a longer history of marginalization within KEA (Edison and Rovira). As Jefferson County educators, Edison and Rovira, write, “But racism is pretty divisive, too!” (120). In 2019, Kentucky educators faced another uphill battle over their pension. Republicans were planning to attack the Kentucky Teachers Retirement System (KTRS) as the session was winding

down, much as they had done in 2018. KY 120 called for a statewide sickout in protest of this bill, shutting down several school districts, including Jefferson, Fayette, Bath, Boyd, Carter, Letcher, Madison and Marion counties, in a one-day protest (McLaren). The bill, HB 525, sought to change the composition of the KTRS board by limiting KEA's seats and turning those seats over to other educator and administrator non-union professional organizations, like the Kentucky Association of Professional Educators (Desrochers). The JCTA did not support the sickout, and the divisions sowed in 2018 between Jefferson County educators and KY 120 remained strong.

Walker's experiences shaped her understanding of unionism and its relationship with political parties. The series of wildcat strikes damaged the relationship between Jefferson County educators and the rest of KEA. Every year, KEA holds a delegate assembly where elected representatives from across the state meet to pass new business items that will shape the union for the rest of the year. Walker was a delegate at the KEA Delegate Assembly only a few short weeks after West Virginia's and Kentucky's 2019 strikes. As she attempted to put forth a new business item to deal with Kentucky's racialized educational disparities, the other delegates sidelined her. Every proposal that Jefferson County educators put forth was shut down by the rest of the state's delegates.

Walker believed that KY 120 was responsible for blocking much of the work coming out of Jefferson County that year. "[KY 120 leaders] pretty much blocked us from getting anything done at the assembly," Walker related in her interview.

For instance, there was a new business item for our comprehensive school support priority schools, and schools that need extra assistance and smaller classroom sizes, but because it was Jefferson County pushing for it, they [the delegates] said "no." And even someone else came up and helped me reword it and they still shut it down because those other counties retaliated against us due to the [2018] sickouts. It was brought to my attention by another white teacher that the other counties were mad about the sickouts and wildcats and because KY 120 didn't lead it.

Race and Whiteness featured prominently in how Jefferson County's educators related to others in KEA. In 2018, educator-organizers stood together in unison. Black Lives Matter, Save Our Schools Kentucky, and Kentucky Alliance all worked together to shut down the state. "And when [KY 120] came out and told everyone to shut it down this time [2019]," Walker stated, "it didn't work because you didn't go out to everyone who helped you last year."

Edison had a similar experience at the 2018 Delegate Assembly. While there, Edison was told by KEA's president that everything had been done to resolve the pension issue that year and they should be prepared to call off the strike. "How did they get that conclusion?" Edison wondered. "Everyone was looking for [KY 120 leaders] to tell them what to do, that's just how teachers are; we wait for someone to tell us what to do." When Edison returned to Louisville that weekend, she met with other BLM activists at a local coffee shop and prepared to keep the schools

shut down if need be. The wave of teacher strikes rocking the nation was momentum enough for Louisville's organizers to feel the wind at their backs and believe that they could keep the state shut down for one more week. Confusion followed.

Governor Bevin had come out and vetoed the state's revenue bill and the budget bill, an unexpected turn for many educators. "The Democrats were happy because those bills were going to tax the working class," Edison explained,

They had all voted "no" on this bill, but then, all of a sudden, the unions told us to push our legislators to override the veto. They started calling out some of the Democrats that were happy that Bevin had vetoed the bill, and again, that threw a lot of red flags at us, because we're looking at these Democratic legislators who are supportive of us, and our union leadership is calling them out because they were okay with the budget being vetoed.

Jefferson County was facing the threat of a state takeover and many teachers began to panic. Higher rates of arrest, suspension, and lower standardized test scores were being trotted out by the superintendent to make the argument that the county wasn't performing at the level it should. KEA's president approached Edison, as chair of the Black caucus, and asked her to make a statement about how the Black caucus was opposed to the state takeover. Instead of reaching a consensus about how to do this, however, union leadership, "stole my profile picture and added my statement to show why Black and Brown kids won't be made better by this bill. That was totally unprofessional and uncalled for and had me angry at my own union."

Edison believed that her union's handling of the situation during the sick-outs, coupled with its unwillingness to aid in shaping a racial justice-oriented narrative for many Black and Brown parents in Louisville led to a breakdown in trust between community members and the education unions. KEA's opposition to the state takeover was undemocratic, but Edison knew that this campaign would not resonate with parents. "They're not going to care about that," Edison relayed. "All they're going to see is that the county has been failing Black and Brown students for years and we needed to at least admit that we've failed, that we're going to do something to make this better, make them feel like they're at the center of your agenda, but they [KEA] said no, they're not going to do that."

Mistrust between community activists and unions spilled over as KEA and the emerging KY 120 began working in tandem to push electoralism and a monolithic image of what the union should be. BLM activists came up with an innovative way of reaching the community about the problems with a state takeover. A planned march at the Kentucky Derby at Churchill Downs was in the works and the unions were informed about this idea for direct action. However, at the last minute, KEA backed out and shut down the planned action. "It got really bad between BLM and the unions because they're corporate unions, they're not trying to do social justice work, but we're social justice folks that work in the community, so this non- intersectionality work going on meant that a lot of bad blood was going to start," Edison said.

In 2019, wounds from the previous year's walkouts reopened. Edison had been working with Emerge KY, a Democratic women's group that helps women run for office, for a few years. In 2019 she knew what it looked like to commit to community organizing, union organizing, and electoral organizing all at once. That year, Edison believed that she knew what to expect from the legislature in a year where Governor Bevin would have to face off against strong challengers within and outside his own party. The difference was that the intersections of race and geography altered the landscape in such a way that relying on her union was no longer a possibility. "There was a problem by now of Louisville activists and a lot of White teachers who didn't see all of this backdoor stuff," Edison explained, "and most of them didn't know all of this because they weren't at the table with membership, and most of this information wasn't being said to the membership." When the call went out for another round of sickouts in response to the pension board bill, HB 525, KY 120 had ensured members that the superintendents would support the action. After the one-day sickout, superintendents informed local association presidents that they would not back a strike over the bill. KY 120 called everyone to return to the classrooms, but Louisville educators were keen to respond to bills targeting Jefferson County in particular.

One such bill was a site-based decision bill that would take away the ability for Jefferson County's school board to determine curricula and hire principals and would inhibit community involvement in decisions affecting their schools. Coupled with that was a voucher bill that would've allowed for publicly-funded private schools, which could further starve the already cash-strapped public school system in Jefferson County. "So now," explained Edison, "all of these [Louisville] teachers are looking at Nema [KY 120 leader], who are mad because this is a repeat of 2018 where she tells people to go on strike and then they go back before everything is resolved, and everyone doesn't agree with her because this isn't leadership." Black Lives Matter in Louisville soon became suspicious of KY 120 and questioned why such relatively like-minded activists would call off a powerful strike before all education-related bills had been resolved.

Soon thereafter, hundreds of Jefferson County members who questioned this decision were kicked out of the main KY 120 discussion page. This led to the formation of the group JCPS Leads, and within a single day its social media group boasted nearly four thousand members. "[W]e realized our unions weren't doing anything to stop [poor legislation], and we realized that KY 120 wasn't going to have our backs, so we just stood up and said we'll do it ourselves," Edison said. During the previous year's sickouts, community support coupled with social media allowed non-education workers and parents to stay informed about the sickouts, why they were taking place, and what the demands from educators were. In 2019, however, this did not happen. The one-day sickout was hastily called without using the same channels that had existed in 2018. Anxious about what would happen to striking teachers, the call to return was heeded by all except Jefferson County. When JCPS educators went on a wildcat strike several days later, union leaders did not take it well. JCTA's president, Brent McKim, condemned the strike

on the official JCTA social media page. McKim refused to meet with members who traveled to Frankfort in protest, opting instead to meet with the county superintendent and informing them, according to Edison, that schools could reopen if a delegation from each school could come to Frankfort and negotiate on their behalf.

Edison questioned this decision. “Who said this was our plan? Why do you think you can keep speaking on our behalf?” By continuing to shut down the schools and working alongside BLM to educate parents about this decision, “we showed the governor that he [McKim] had no power over his members . . . he didn’t have power over us.” McKim had been distrusted for some time by many educators. When Democrats controlled the legislature, McKim could negotiate with more amenable legislators. However, the deals struck were not always the best for members. Edison recalled that, for the past decade, money was being pulled from the public employees’ pension fund to prevent the state from having to raise taxes.

That is his [McKim’s] house up there. He’s been at the capitol because he’s one of our lobbyists there. And when the stock market dropped [in 2008], our pensions were depleted because they had borrowed all this money, and this new governor [Bevin] said, “I’m not paying this back, we’re going to have to find out how to deal with this without paying it back,” that’s why we’re here, because of these past ten years or more. . . . [T]his whole time we’re preparing to strike because of these bad bills, and we didn’t even know until later that our union president had been pushing it behind the scenes.

The relationship that had developed between KEA, JCTA’s leadership, and KY 120 made it tough for racial justice-oriented educator-organizers like Edison, Walker, and Rovira to trust their union to protect their interests. Mistrust, split along racial lines, became exacerbated through a series of actions that pitted an electorally-minded, reformist agenda against a more militant, localized one. Refusal on the part of JCTA and KEA union leaders to endorse the actions led by rank-and-file educators in Jefferson County, coupled with the cold shoulder many delegates felt during both years at the annual delegate assembly, solidified fears that the unions in and of themselves could not be trusted to protect their members. According to our interviews and Edison’s and Rovira’s written reflections, organizing alongside community activists, like BLM, was the only route to fight for public education for Louisville students.

Unlike the enthusiasm that the KY 120 group enjoyed after the election, shifting the balance of power as they saw it away from anti-public education politicians, Hancock, an organizer for the public employees Facebook page, KY United We Stand (precursor to KY 120), was more pessimistic about the concept of “relationship building” with elected officials:

I just saw that [KY] 120 was getting this insider information on what was happening at the legislature, and I don’t want to discount that that isn’t valuable, it is. . . . It’s that it seems like they’re tolerating them to get

something out of the situation rather than accepting them and wanting to see things change. That's my concern with the relationship building. Is this a true relationship or a symbiotic relationship?

Distrustful of this strategy as Hancock was, she felt there was little else KY United We Stand could do to block harmful legislation or change the electoral map of Kentucky. There was less of an organizational structure built within KY United We Stand prior to the walkouts, and this led to KY 120 becoming a more mobilized offshoot. Those who had been most active in KY United We Stand joined KY 120, placing more time and energy into building it and working to complete its mission. KY United We Stand's non-partisan, nebulous structure meant that online-to-on-the-ground actions could only materialize at times of intense crisis (e.g., 2017 special session announcement, 2018 walkouts, midterms), with each successive crisis draining member capacity or diverting it into KY 120's structure. Finding a middle ground between electoral activism and direct-action activism is challenging. KY United We Stand opted to become the educational resource for Kentuckians who could stay up to date about issues related to public employees. Lacking structure or timed call-to-actions that can bring in new members into building this project, members became distant observers on social media rather than active participants.

As Walker noted of the ineffective KY 120-led 2019 sickout, the success and energy of the 2018 walkouts were significantly rooted in the coalitional relationships among educators and community-based organizations and activists, particularly in Kentucky's urban areas. Edison and Rovira write,

Our goals, as educators in the public school system, should be restoring the promise of public education by insisting that “common good” issues, like the conditions enabling the school-to-prison pipeline, be negotiated alongside typical bread-and-butter issues, like wages and benefits. Whatever your color, if you truly love your job and molding young minds into productive citizens, then you definitely should be striking—or disrupting business as usual and putting your bodies on the line, as earlier generations did for humanity in the 1960s! Those not standing in solidarity with us spin a narrative; they call us “divisive” to cover up their own apathy. (125)

Edison's and Rovira's orientation to the state and collaborationism—one premised on rank-and-file power and coalitional relationships with community-based movements—stands in stark contrast to KY 120's electoral emphasis and hierarchical structure. While KY 120 and the KEA sought to repress dissent with the removal and marginalization of Jefferson County educators, KY United We Stand did not have the organizational structure or base to do more than moderate discussion on social media. Without such rank-and-file power, Hancock's perspective offers the only other, rather narrow and individualized, option educators and public employees feel they have to effect change: “The only

superpower you have is to vote, and even if you're not voting for who I want you to vote for, I still want you to vote. I won't tell anyone who to vote for, but I will tell them they need to get out and vote because our turnout is terrible."

● Oklahoma and Arizona: Divergent Paths

The experiences of West Virginia and Kentucky rank-and-file educators as they navigated during and in the aftermath of the 2018 strikes provides insights into the different contexts that contributed to educators' and educator organizations' approach to electoralism and its consequences in the short term. As we turn to consider Arizona and Oklahoma, we aim to illuminate the differences in each state's emerging rank-and-file-led educator movement and their divergent relationships to their state unions.

○ Oklahoma: Desires for Union Democratization

United Sapulpa Educators (USE) president, Carla Cale, experienced the state-wide walkouts in 1990 as a new teacher. Cale remembered becoming involved in her union as soon as she began teaching, an ethic she had internalized from her teacher education program. Growing up in Sapulpa, a town southwest of Tulsa, Cale recalled the 1990 walkouts had some support among the Sapulpa school board and community, though not as widespread as in 2018. After USE, a local affiliated with OEA, voted overwhelmingly in favor of walking out, Cale recalled a contentious school board meeting: "I remember a local community member, a very active community member, speaking up and wanting us all terminated at that board meeting." The few other educators we interviewed who had participated in the 1990 walkout responded similarly of their experiences—community members demanding teachers fired *en masse*, vitriolic legislators, and much less supportive administrators and school boards.

Prior to the 1990 strike, an OEA delegate assembly strike authorization vote in 1988 had pushed the legislature to author an emergency bill to address dismal education funding, rapidly expanding class sizes, and educators' paltry wages. By April 11, 1990, the State Senate had failed, by a handful of votes, to add the emergency clause to HB 1017. Within twenty-four hours, OEA was on strike and rallied at the Capitol on April 12, 1990. They held out for four days until HB 1017 was passed. Educators won \$6,000 wage increases and hundreds of millions of dollars in increased funding for schools (Oklahoma Education Association). At the time, the Speaker of the House, Steve Lewis, said of the action: "It was a simple outpouring of physical demonstration, of commitment and concern. It was just something that you had to see to understand. And just the thought of professional people by the thousands standing out in the rain to try to show their concern and commitment, it made the difference" (Jones). Such praise in the aftermath aimed to situate educators as "professionals," distinguishing their actions from trade unionists and common workers.

Oklahoma legislators had long been trying to pass right-to-work legislation that would drastically restrict unions' ability to recruit dues-paying members and the protection of unionized workers from termination. As one of the largest public sector unions in the state at the time, it is not hard to imagine (and in line with Shelton's thesis) that this action contributed to Oklahoma's eventual 2001 passage of a right to work law, which was voted on by state question (Oklahoma Historical Society). This meant that ordinary voting residents ensured Oklahoma became the twenty-second "Right to Work" state. The new laws had a dramatic effect on public sector unionism. In 2001, Oklahoma union members counted 119,000 and by 2005, just 77,000 (Layden). OEA, the largest educator union in the state, lost forty-four percent of its members between 1993 and 2019 (Carter).

Cale stated one of the most current pressing issues facing Oklahoma public education is "keeping people politically engaged. Education employees, educational supporters. . . . Parents, community members, every human being that supports education needs to stay politically engaged at all times, not just during walkout times." In 1990, educators relied primarily on news media and their unions for information concerning the walkouts. The walkout had been authorized by a vote of union members—Cale recalled her angst in voting "yes" back then, fearing losing her teaching job. In 2018, while union members were polled, the determination for the walkouts arose from informal, rather than formal, decision-making processes only after OEA leaders had come to understand the widespread support and inevitability of increased confrontation. Since right-to-work, no vote to authorize a strike was technically necessary (as it was in 1990) because they were not "legally" allowed to strike in the first place. With fewer resources and members, state union leaders worked to cultivate and maintain relationships with elected leaders and understood the strike as a potential threat to this work.

Social media provided an important space for information sharing, both on the larger Facebook pages (TTN and OTU) and in the many locally organized secret groups. Cale's experience as a local union leader provides a window into the differences in how the union operated in its communication and connection to members between the 1990 strike and that of 2018:

[In 2018, a] lot of the information was passed on through building reps, which is United Sapulpa Educators. We have building rep[representative]s in each of our building sites. For every ten members we have in a building, they're allowed to have a building rep, which is a voting member, and their voice within our local association. We also had mass communications going out to every district employee from administrators to our support staff via emails. And there were a lot of meetings that were happening between myself as the leader of our organization and our district leadership in the weeks leading up to the walkout. And those meetings that happened between our superintendent [and] our assistant superintendent, were very positive meetings. And that made my job as president of United Sapulpa Educators a little bit easier, a little less stressful.

Like many unions, while educators may be allowed one building representative per ten members, many buildings struggle to find educators willing to serve in the position and levels of engagement in the larger union vary widely across locals in the state (Weiner, “The Future of Our Schools”). Unlike the 1990 walkout, union leaders collaborated closely with more supportive administrators, and much of the informational flow was uni-directional—from the union leadership (in conversation with superintendents and elected officials) to the members.

Nikki Rice, an educator in Broken Arrow, a wealthier suburb of Tulsa, received nearly all her information from either the OEA newsletters and emails and from social media: “They would send out newsletters and emails. And Facebook. There was a lot of stuff on Facebook.” She, and most of her colleagues, did not attend any union meetings during the lead up to the action, and she did not recall much discussion among her colleagues. “Leading up to the walkout? You know I don’t really remember having very many conversations because it was kind of like well if it happens it happens. I don’t know if it will happen. Maybe it will; maybe it won’t, just kind of wishy-washy type stuff and I honestly don’t think that the teachers thought it would happen.” Alternatively, in Putnam City, educators benefited from active building representatives. As educator Crystal Watkins described: “We have two really active people that are in our part of the district, the north side of the district that are really active with PACT [Putnam City Association of Classroom Teachers], which is our district union. . . . They were always going to meetings and bringing us back information, which was really helpful.” Far from one representative for every ten educators, PACT maybe had one or two per school, and Watkins happened to be at a site with a very active rep.

Watkins had experienced “grumblings” in Putnam City throughout the year prior and even earlier after the failure of the 2016 penny sales tax, she thought.

It was already in the works. It was already something that was going to happen. West Virginia, I think the feeling was that we were so angry that we’d been wanting something to happen for a long time. And we’re like, “Well, West Virginia just did it.” It wasn’t like a catalyst, but it was like a, “See, someone is doing something. We can do the same thing. Why do we keep pushing this back?”

Watkins said educators at her Putnam City school, adjacent to Oklahoma City, turned over at nearly fifty percent each year, facing large class sizes, increasing workloads, and low pay. Some educators lamented the town’s shifting racial and class diversity as Black and Latinx families moved in from the city. For educators who remained, Watkins described the general sentiment: “We’ve got empty rooms with no teachers in them and kids practically stacked on top of each other in certain grades and core subjects. So, that’s really what got us going was like, ‘We can’t just keep every year starting from zero.’” Largely because of the experience of union mentors, Watkins and her co-workers were

actively engaged in pushing for and organizing the walkout:

We had a lot of coalition meetings, if you will, leading up to that. Just a lot of checking in. Our reps would constantly be gauging how we felt about things. . . . Our reps would have meetings with us and say, “What do we need to do? What needs to happen in order for us to feel like we can keep, retain, and get quality teachers? How can we get our classroom numbers down?” Basically, they would just check in. I’m going to do air quotes here for “list of demands.” And they would go back to the larger group and report back to all the other schools [in the district].

In these coalition [site-based PACT] meetings, Watkins described how educators in her local were pushing for a much earlier date, even at the end of the fall semester and the beginning of the spring: “I feel like we as in teachers set a date, and we were going towards that goal, and the whole thing was co-opted by OEA, and they changed the date [to April 23], and we were set on an earlier date.”

In the aftermath of the strike, union and non-union members alike grew incensed at the ways in which the OEA, in communication with legislators and the state’s superintendents, called off the walkout. On the day the union called off the walkout, union staff had sent a poll to members. However, with many members at the Capitol and little access to reception, many did not receive it. Many of our interviewees did not recall receiving it at all. Mid-Del City educator, Tessie Curran described a common sentiment in response to the decision: anger. “I was so mad because it was at that point where I felt like we were getting somewhere, and I felt like we were so close to understanding everything that was going into what we were fighting. . . . I didn’t know how quickly everything was just gonna go back to normal. I couldn’t deal with that. It was very difficult. I was very angry.”

As Watkins’ and Rice’s experiences illuminate, educators had vastly different experiences with the strike and their local and state union organizations. Rice stated the best thing to come out of her experience in the walkouts was the ways in which she was able to develop closer relationships with her fellow educators, people she hardly knew before. They would keep each other informed, have political discussions, and stay up to date. Although she already felt that was waning a year and a half later. Rice felt she was mostly a passive participant, following the direction of OEA and local union leaders. For Watkins and others, while spaces of union democracy were made possible through the energy and commitment of active building representatives, the state union’s top-down “co-optation” left a sore feeling for many. While Larry Cagle’s OTU made clear its aim to make a change in the leadership of OEA in the aftermath of the strike, the issues with the union’s structure and modes of accountability to its members were organizational in nature, rather than simply a problem of individual leaders. OEA’s diminishment in membership and union structures after right-to-work created a sense that a (quite one-sided) lobbying relationship with legislators was the only way to push for pro-public education policies. In the absence of stronger, democratic union movements to challenge this orientation from within the union,

OEA leaders chose to try to preserve their legislative relationships rather than continue to confront the state via striking.

As studies of social justice caucuses have illuminated, a shift in union leadership is not the only ingredient necessary for union democratization and to push unions to fight for working conditions and the common good. In both Asselin's study of MORE and WE and Stark's study of caucuses in the UCORE network, when social justice caucuses win union leadership by putting forth slates of their own candidates, the caucus can wield more substantive influence in the union (as with CORE). However, it can risk limiting caucus organizers' energy for building active caucus members, site-level unionists, and engaging in community-based relationship-building. These kinds of activities are what have made many social justice caucuses successful in their efforts to steer the priorities of their unions. Likewise, as Arizona demonstrated in their soon-to-follow walkout, business union-oriented leaders respond most strongly to organized rank-and-file power.

○ Arizona Educators United and Grassroots Organization

As AEU organizer, Rebecca Garelli describes in her contribution to the edited volume, *Strike for the Common Good: Fighting for the Future of Public Education*, soon-to-be organizers for AEU, “camped out on other states’ ‘United’ pages for quite some time. We lurked in the background, watching and learning how other states were organizing” (103). AEU organizers drew on West Virginia’s and Oklahoma’s strategy “tracking and counting the counties, districts, and schools that had mobilized—and from Oklahoma—like updating lists and making them public” (103). However, they engaged these strategies not only to visualize and track local support but also to build the infrastructure of their grassroots organization, and “so all members of the group could see what districts and which schools had a volunteer liaison” (103). Erin’s interview with AEU organizer Vanessa Arrendondo shed light on the amount of administrative and relational work that had to take place in order to develop and maintain these volunteers. AEU core organizers, at the time, were few in relation to overall numbers of educators in the state. While Arrendondo and others managed the organization and visualization of the liaison network, liaison communications, and requests for input via various kinds of social media and texting technologies, liaisons benefited from in-person trainings conducted by the state union. The AEA had the infrastructure and resources to do so. Such training combined with AEU’s organizational independence allowed them to facilitate and participate in escalating actions in the lead-up to the strike, like “Red for Ed” days, where educators showed up together wearing red and “walked-in” to school all together as a show of force and organization.

AEU organizers also learned from Oklahoma, and other states, in the ways they structured their social media. While Oklahoma had massive, centrally moderated Facebook pages controlled by just one, two, or a few people, AEU had developed a network of linked local Facebook pages, which dispersed

decision-making and coordination activities among local organizers. The core AEU organizers balanced the engagement of liaisons by both providing clear directions and meaningful resources for what liaisons could/should do in their local places and engaged several processes to develop their five main demands from the ground up. “We hosted a series of polls in the main AEU Facebook page that allowed teachers to offer suggestions for demands and vote on what was most important to them. Ultimately, these polls developed what became the five demands of the movement” (Garelli 109).

Garelli writes that AEU organizers had “built a strong and respectful relationship with our statewide union,” noting that this relationship was much different than more contentious relationships in Oklahoma and Kentucky (108). “The AEA understood that our grassroots group, AEU, included the ‘drivers of the bus,’ and union leadership understood that educators’ voices needed to be out in the forefront” (108). Oklahoma’s OTU educator organizer, Larry Cagle, said that he felt that AEA had learned from the experiences of OEA after seeing the extreme backlash the state union had experienced over how the walkout ended, a sentiment similarly felt by many other Oklahoma educators. By the end of the 2017/2018 school year, the OEA dropped in membership by 1.7 percent and KEA membership in Kentucky had also fallen 1.7 percent (Antonucci). Alternatively, educator union membership in state-level NEA associations increased in West Virginia and Arizona, by 3.8 percent and 10.3 percent, respectively (Antonucci).

Karvelis recounts that AEU struggled to become differentiated from the state union, which endorsed candidates, unlike AEU. As a result, AEU began to become increasingly associated with the Democratic Party and, he theorizes, created a kind of political legitimacy that had not existed in the early days of the movement: “Due to the #RedForEd movement’s status as a new entity outside of the typical patterns of contention and political logic in Arizona, it was difficult for established power structures to identify and react to the movement” (Karvelis, “Towards a Theory of Teacher Agency” 2). Cagle stated similarly of his experiences in conversation with legislators. He recalled a conversation with a state legislator, who told him that the legislature remains scared of teachers. During the walkouts, Cagle reported the legislator said, “we didn’t know who to negotiate with at first.” As things progressed, they locked onto OEA to negotiate an end to the strike and succeeded on terms less than favorable to educators.

Karvelis argues that the broader Red for Ed movement in the state, including AEU, became more institutionalized after the walkouts as they sought to advance the Invest in Ed policy agenda through canvassing for political candidates who would support the measures. He writes, “[A] deep fracturing of the movement occurred as partisan lines were further developed, and focus shifted from collective demands and towards standard models of electoral activism” (4). He argues this shift impacted the possibilities that had emerged from the democratically-driven solidarity actions during the strike: “the ability to claim the unoccupied spaces in Arizona’s political landscape and to exploit the gaps that previously existed disintegrated” (4).

For AEU organizers, as Arrendondo articulated, the movement's shift away from its five main demands, constructed through the early efforts of AEU organizers to develop and cohere a statewide network of local organizing, was a significant contributor to the loss of three quarters of site liaisons after the walkouts ended. When asked what she wished they had done differently, Arrendondo said:

I would keep bringing everything back to the members. The one thing would be to just go back to the members and ask "what do you want?" Ultimately, we were able to undertake the statewide walkout because all of these members came together. Not just because we said, as leaders, "Okay, we're going to do it." Members were in it for the long run, and they believed in the cause. They believed in the five demands. (Karvelis, "Rural Organizing" 101).

For AEU organizers, these kinds of questions around movement strategies, institutionalization, and grassroots organizing are dynamic and ongoing. Unlike Oklahoma's organizations, AEU continues to organize, building upon its movement knowledge. While some core organizers stepped back or left teaching, others remained—like Arrendondo and Garelli. AEU has, most recently, been active in its efforts to fight for a safe return to in-person schooling during the pandemic, supporting several sickouts in local districts in the state. AEU has also inspired a national network of statewide rank-and-file educator organizations in Washington, Virginia, Indiana, New Jersey, and Arizona under the banner of NEU. Garelli, among others, have been instrumental in developing this network while continuing to organize within AEU.

● Conclusion

In this chapter, we began our discussion of the question of the state via studies of transnational educator and social movements, examining both how different movements take up the question of whether and how to collaborate with the state within their national contexts and how these movements exist in conversation. Educator movements are interstate and transnational movements. They exist in conversation at the level of the grassroots, via labor conference meetings and through study (Bocking; Stark; Stark and Spreen). They necessarily exist in conversation as many neoliberal policy strategies that have wrought the most damage on global public education originated with US corporate and state interests. Such policies have and continue to be implemented across the globe as the education industry becomes increasingly profitable for private business and politically useful for the state under capitalism.

A significant challenge, as Bocking writes, is scale. Neoliberal policies have been and continue to scale up across the US, as West Virginia educators experienced and mobilized against in 2019 with the introduction of pro-charter school policies, and across the globe. In response, so have union movements attempted to scale up. In his study of teachers' unions in New York, Ontario, Canada, and

Mexico, Bocking writes, “To varying degrees in all three cases, it appeared that the strongest scalar advantage was afforded to teachers at the local district level. Teachers’ unions are trying to reconsolidate themselves at higher scales but face much stronger government authorities at the state/provincial or national level than locally” (387). Further, Bocking argues for the importance of unions’ strong school-site presence, as educators feel these policies in their lives most directly within their classroom practice and everyday work. As our analysis of West Virginia, Kentucky, Oklahoma, and Arizona suggests, educators participated in (or became alienated from) their state’s struggles to the extent they identified with and had meaningful access to participate in the movement’s formation and decision-making. Likewise, such grassroots participation is a foregrounding principle of longstanding and formidable social movements, like the MST, EZLN, and Mexico’s democratic teachers’ movement.

As the experiences of Kentucky’s Jefferson County educators suggest, movements’ decision-making is always fraught, contingent upon the various ways educators understand the roots of the issues impacting their and their students’ and communities’ lives and how these issues are felt in the classroom and beyond (also see Asselin; Stark). West Virginia educators constructed a social justice-oriented caucus informed by the emerging worker consciousness of its members. This consciousness and orientation to their work was bolstered by the experience of a successful wildcat strike unsanctioned by its state union in 2018. The experiences of educators across Kentucky during and in the aftermath of their major strike illuminates the significant impacts of White supremacy and racism on educator solidarity. While educators in Jefferson County had built strong coalitions among racial justice community organizations which contributed to the energy and participation of the 2018 strike, KY 120 and KEA favored centralization. Such centralization enabled KY 120 and KEA leadership to avoid and repress serious conversations about the educational issues facing Kentucky’s urban communities in favor of catering to its White, conservative, and/or rural members, engaged primarily via social media. As a result, its KY 120-led 2019 sickout lacked the strength of force of the more grassroots- mobilized 2018 strike. While Arizona rank-and-file educators organized a robust grassroots network of local organizing, Oklahoma educators’ organizing was more nebulous, organizationally disconnected across localities, and contingent. The most visibly articulated leaders in the news and social media were not recognized by most educators as such, and the state union was able to claim control over ending the action before most were ready.

The 2018 strikes took place at a statewide scale. In the aftermath of winning partial demands that were both impactful locally and statewide, in each state, retaliatory legislation sought to repress future actions. For example, in 2019, Oklahoma legislators introduced a bill (which later died in committee after strong backlash) that would permanently revoke a teacher’s state license for engaging in a future walkout or protest (Yan). And, despite their 2019 strikes, West Virginia eventually passed a school privatization bill during the next summer break. It

seems fair to say that none of the emergent educator movements may yet have the kind of strength of collective and grassroots organization that would enable them to engage in strategic and contentious co-governance. In different ways, each of the state educator movements under study illuminates the risks of state collaboration and the significance of building strong, intersectional, queer and feminist, and democratic power fueled by cultures of solidarity. For Tarlau, such cultures of solidarity are necessarily prior to co-governance. In places like Jefferson County in Kentucky, like CORE in Chicago and other social justice caucuses, coalitional relationships with and for community and social movement organizations provide important sources of power and resources for advancing the most impactful, relevant demands for educators, students, and communities. In all the “red” states, educators with experiences participating in social movements and labor struggle were and continue to be at the forefront of organizing most forcefully in their local districts and state contexts and were the backbone of the strikes in the first place (see Dyke and Muckian-Bates).

As all these struggles teach us, scaling up to the state level and beyond cannot shortcut local, grassroots organizing. And such local, grassroots organizing is rooted in, as we have elaborated in other chapters, the specific histories and contexts of local places. These histories and geographies require movements’ concerted engagements with intersecting relations of power and oppression along the lines of race, gender, and class, and how these relations shape the conditions of education and struggle, locally and beyond.