“WE’RE TRYING TO CREATE A DIFFERENT WORLD”: EDUCATOR ORGANIZING IN SOCIAL JUSTICE CAUCUSES

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ABSTRACT

Over the past three decades, the public education system in the United States has been dramatically reshaped by market-based policies at the local, state, and federal levels. These policies have been described as a “global assault” (Compton & Weiner, 2008) on education that has exacerbated existing economic and racial inequalities (Lipman, 2011). While leaders of the nation’s two major teachers’ unions, the National Education Association (NEA) and the American Federation of Teachers (AFT), have failed to adequately respond to this assault (Weiner, 2012), a number of local, national, and international grassroots organizations have developed with the express purpose of combatting neoliberal policies and social inequalities from the ground up (Spreen & Stark, 2014). Among these organizations are social justice caucuses: groups of rank-and-file educators who build their collective power to democratically transform their unions and advance justice in schools and society.

This dissertation explores educator organizing in the United Caucuses of Rank-and-File Educators (UCORE), a growing network of social justice caucuses within teachers’ unions in the United States. The UCORE network was founded in 2014, following two years of informal organizing between member caucuses and over twenty years of policy mobility between union organizers in cities such as Chicago, New York, Philadelphia, Los Angeles, and Seattle. While scholars have published a small number of case studies of social justice caucuses, there is little research documenting the

development of educator organizing and policy mobility between caucuses. Likewise, few studies have explored the purpose, principles, and practices of educator organizing within social justice caucuses. With this in mind, the aim of this dissertation is to trace educator organizing and policy mobility within the UCORE network using the methodology of militant ethnography. This project documents the work of member caucuses using participatory observation, document analysis, social media analysis, and interviews.

Over the course of this dissertation, I discuss how organizers conceptualize the purpose of social justice caucus organizing, arguing that individual caucuses adapt their stated purposes over five iterative phases of development. I also identify four ethical principles that educator organizers use to frame, guide, and evaluate their work. Moreover, I identify ten cultural practices of social justice caucuses, noting how these practices enable organizers to advance their caucus's purpose and principles. Lastly, I discuss how some of these practices enable the spread of social justice unionist policies across the UCORE network, furthering the development of contemporary educator movements. By investigating the work of social justice caucuses, this dissertation will result in a better understanding of recent developments in the history of labor organizing and education policy in the U.S. It will also contribute to research on education activism, social justice unionism, and social movement organizing.

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APPROVAL OF THE DISSERTATION

This dissertation, (“We’re trying to create a different world”: Educator Organizing in Social Justice Caucuses), has been approved by the Graduate Faculty of the Curry School of Education in partial fulfillment of the requirements for the degree of Doctor of Philosophy.

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DEDICATION

This dissertation is dedicated to:

Educators in the movements to transform our unions, schools, and communities for justice and democracy, who have shown us that another world is possible and that we can build it together.

My students and colleagues at Talley, A.I DuPont, Manor, Charlottesville, and Cleveland secondary schools, who have deepened my critical analysis and commitment to public education.

Kathy, Julie, Jackson, Brian, and John, who have offered love and encouragement throughout this journey.

Scott and Jo, who have filled my life with joy and are the reasons for everything I do.

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This project would not have been possible without the support and analysis of organizers within the UCORE network. I am especially grateful to the caucus communities that have welcomed me into their organizing spaces, in particular the AlbuCORE, CORE, MORE, SEE, and WE caucuses. The SEE caucus has been especially instrumental in enabling me to experience the day-to-day realities of caucus organizing as a Steering Committee member for the past three years. I am likewise grateful to the Steering Committee of the national UCORE network, whose members have offered thoughtful feedback on both the design and findings of this project. Several UCORE members helped to shape this project, including but not limited to Arlene Inouye, Barbara Madeloni, Craig Gordon, Dan Trocolli, Darrin Hoop, Debby Pope, Ellen David Friedman, Francesca Blueher, Jesse Hagopian, Joel Jordan, Kristin Luebbert, and Michelle Gunderson. Most of all, I am deeply indebted to the caucus organizers across the network who shared their analysis and expertise with me for this project. In addition to welcoming me as a member of this remarkable community, these and many other organizers in the UCORE network have given me hope for the future of our schools, unions, and broader communities.

Throughout this project, I have also been supported by my mentors and colleagues within the fields of educational studies, critical policy studies, labor studies, and the sociology of education. I am grateful to be a member of a vibrant, growing community of critical scholars supporting educator movements through their work, which

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LIST OF ACRONYMS

AlbuCORE	Albuquerque Caucus of Rank-and-File Educators
AEU	Arizona Educators United
AFL-CIO	American Federation of Labor – Congress of Industrial Organizations
AFT	American Federation of Teachers
ALEC	American Legislative Exchange Council
BCTF	British Columbia Teachers' Federation
BMORE	Baltimore Movement of Rank-and-File Educators
BMUCN	Black Men United to Change the Narrative
CORE	Caucus of Rank-and-File Educators
CS	Classroom Struggle
CTU	Chicago Teachers Union
EDU	Educators for a Democratic Union
LN	Labor Notes
MORE	Movement of Rank-and-File Educators
MTA	Massachusetts Teachers Association
NCEA	National Coalition of Education Activists
NCLB	No Child Left Behind
NJCORE	New Jersey Caucus of Rank-and-File Educators
NYCoRE	New York Coalition of Radical Educators
OEA	Oakland Education Association
RCORE	Renton Caucus of Rank-and-File Educators
RtT	Race to the Top
SEA	Seattle Education Association
SEE	Social Equity Educators
SJC	Social Justice Caucus
SJU	Social Justice Unionism
SMU	Social Movement Unionism
SPS	Seattle Public Schools
TAG	Teacher Action Group
TU	Teachers Union
UCORE	United Caucuses of Rank-and-File Educators
UP	Union Power
UTLA	United Teachers – Los Angeles
WE	Caucus of Working Educators
WVPEU	West Virginia Public Employees United
WVU	West Virginia United

PREFACE

Our voices grew louder and more enthusiastic as we reached the final verse, and as I looked around the multipurpose room I was reminded of the sensation of singing at a family reunion every year:

> *In our hands is placed a power greater than their hoarded gold*
> *Greater than the might of armies magnified a thousand-fold*
> *We can bring to birth a new world from the ashes of the old for*
> *But the union makes us strong*
>
> *Solidarity Forever*
> *Solidarity Forever*
> *Solidarity Forever*
> *For the union makes us strong*

We took our seats and turned our attention to a woman standing at the center of the room, an educator whom I had admired for several years as an influential advocate for progressive public education and a leader in the Caucus of Rank-and-File Educators (CORE), a social justice caucus of the Chicago Teachers Union (CTU). In a friendly but authoritative "teacher voice," she addressed the crowd: "Brothers and sisters, let's come to order. So, I've almost been given a Herculean task, and that's to end this conference and this time that we've spent together since Friday evening. We are teachers, and I was out in the hallway with [a Philadelphia nurse], and she said when she was watching [a Philadelphia educator] formulate those ideas and then deciding what those ideas would be, and then breaking us off into groups, she as a nurse was saying, 'This is how teachers do things.'"

This was a fitting joke for a room with over seventy unionist educators, and we laughed in recognition of one of the tricks of our trade. She continued, “They aren’t afraid of things being unstructured, and they elicit the best of the people they’re working with. And that’s why I think teachers should rule the world and run the revolution.” Her final words elicited claps from the group, a few of whom exclaimed, “woo-hoo!” (field notes, 2015, August 6).

* * *

In this excerpt from my field notes, I was documenting the second annual convention of the United Caucuses of Rank-and-File Educators (UCORE), a national network of unionist educators in the United States. The educators in this network are predominantly active organizers within social justice caucuses, which can broadly be defined as groups of rank-and-file educators dedicated to transforming their unions and advancing equity in their schools and broader communities from the ground up. In the room were organizers who had led some of the most notable recent education and labor uprisings in the country, including the 2012 Chicago Teachers’ strike and the 2013 MAP boycott in Seattle. There were also educators who would go on to shape some of the most significant labor actions in the years to come, including the 2015 Seattle teachers’ strike and the 2019 Los Angeles teachers’ strike. Moreover, while the vast majority of educators at this meeting taught in unionized urban school districts, many of them would serve as mentors to new and developing caucuses pursuing similar actions in states with anti-union “right-to-work” laws, including the organizations that led two of the most influential uprisings of the #RedforEd movement: Arizona Educators United and West Virginia Public Employees United.

This was the first of over 40 UCORE network meetings I would go on to attend in the four years I have spent as a scholar activist working in collaboration with the UCORE network to document, analyze, and support their work. After traveling across the country to conduct field work in several of the most active caucuses in the network, I began to engage more directly as an education organizer, returning to the classroom in Washington state to serve as an area representative in the Seattle Education Association (SEA) and a Steering Committee member of the Social Equity Educators (SEE) caucus for over three years. In total, I would go on to conduct over three hundred hours of participant observations in over 130 meetings and social actions led by educators in social justice caucuses, as well as many more hours of field work as a representative and organizer.

I have begun with this moment because it illustrates a few significant dimensions of the UCORE network that I hope to explore in this dissertation and other related scholarship. First, in the inclusion of this excerpt from my field notes, we get a sense of the militant ethnographic approach I have taken in this project, conducting participant observations as a fellow educator and – eventually – social justice unionist and documenting these observations using “thick description” (Geertz, 1987). Second, with the leftist address of “brothers and sisters,” we get a sense of the close kinship between educators in the room, the deeply relational nature of caucus organizing in the UCORE network, and the political orientations and labor roots of many members. Third, in the discussion of the process that the Philadelphia educator used to organize group discussions, we get a sense of the cultural practices of organizers in the UCORE network: the specific processes that *educators* use to discuss ideas, make decisions, and build campaigns. Fourth and finally, in the speaker’s comment that “teachers should rule the

world and run the revolution," we get a sense of the greater purpose of educator organizing in the UCORE network. In bringing together educator unionists from across the country, this moment represents not only a significant step in the spread of a new form of unionism (which it certainly is), but also a significant moment in the growth of contemporary educator movements: social movements aimed at transforming not just educators' unions but also schools and society as a whole.

PART ONE:

INTRODUCTION, BACKGROUND, CONCEPTUAL FRAMEWORK, AND METHODOLOGY

CHAPTER 1: Introduction

> *Well, I think the purpose of having a national network is the fact that our enemies are national and in fact international in scope, and that we really can't just fight against them in Wisconsin, or in Chicago, or in Seattle. We have to be taking on the larger political fight that is national in scope, and it's against corporatization and privatization, and for public education as a right and equal access to a really quality education for all kids. We have to be taking that fight on nationally, and we have to try in the long run to transform our national unions into fighting tools to get these things.* (D. Pope, personal communication, February 11, 2019)

> *Practically speaking, the best thing about all of the teacher actions in the last year around the country is that it shows people what is possible, and it breaks through that fractured feeling that, well, this is the way things have been here. This is the way they've been forever, there's no other way for it to be. You know it's like, if all 55 counties in West Virginia can call out and they are a right to work state. […] You know, we had our annual convention this year, and we had two UTLA board members come here and talk about their model and help us see that. And so that's important for folks to see that the caucus also is not just like a little isolated group, but that we're a part of this nationwide network, and that many members of that network have taken leadership.* (L. Pahomov, personal communication, May 14, 2019)

Over the course of the past three decades, we have seen unprecedented changes to the education policy landscape in the United States. Beginning with the 1983 publication of *A Nation at Risk*, policymakers across the country have increasingly focused on the standardization of public education, developing both statewide and national standards that are linked to accountability measures such as high-stakes tests and performance-based teacher evaluations (National Commission on Excellence in Education, 1983). In the nation's urban centers, performance on these tests has been used to justify mayoral control, school ranking, charterization, "turnarounds," colocation, and school closures that have disproportionately affected communities of color (Lipman, 2011; Spreen &

Stark, 2014). At the federal level, legislation such as No Child Left Behind (NCLB, 2002) and Race to the Top (U.S. Department of Education, 2009) have legitimized, incentivized, and, in many cases, mandated these policy changes. We have also seen considerable attacks on the working conditions and bargaining rights of the predominantly female teaching profession at the state and local levels, with frozen pay structures and the erosion of bargaining rights and tenure in states such as Arizona, North Carolina, Ohio, West Virginia, and Wisconsin.

These changes have been rightly analyzed as examples of neoliberalism in education policy, loosely defined as "a complex, often incoherent, unstable and even contradictory set of practices that are organized around a certain imagination of the 'market'" (Shamir, 2008). More specifically, we can understand cuts to funding and other austerity measures as examples of "roll-back neoliberalism," while new governance systems such as tests, evaluations, charterization, and school choice legislation can be understood as examples of "roll-out neoliberalism" (Peck & Tickell, 2002). In the United States, Britain, and other countries, these policy changes have been promoted by policy brokers that include think tanks, hedge fund managers, and what have been termed "venture philanthropists" (Spreen & Stark, 2014). Neoliberal policies have advanced on the global scale through international policymakers and NGOs, constituting a "global assault" (Compton & Weiner, 2008) on public education that has been termed the Global Education Reform Movement or GERM. Given the racial dimensions of this assault and the long-standing history of segregation and unequal education in U.S. schools, scholars and activists have further used a racial equity lens to conceptualize this assault as a

"hydra" whose attacks are rooted in both neoliberalism and systemic racism (Picower & Mayorga, 2015).

The two major teachers' unions in the United States, the National Education Association (NEA) and the American Federation of Teachers (AFT), have failed to adequately respond to this "global assault" on public education and educators (Compton & Weiner, 2008; Weiner, 2012). Indeed, the administrations of both unions have welcomed many of these changes, with the AFT issuing a press statement that they "applaud" the neoliberal Race to the Top grant program (AFT, 2010). Even in cases where national union leadership have challenged these policies, as was the case with the NEA and No Child Left Behind, they have done so through a focus on lobbying, legislative challenges, and fundraising for Democratic candidates who in most cases have not supported educators' interests (NEA, 2008).

However, a number of local, national, and international grassroots organizations have developed with the purpose of combatting neoliberal education policies and broader social inequalities. Among these organizations are social justice caucuses, which can generally be understood as groups of educators who are organizing to build the rank-and-file power necessary to transform their unions and advance justice in schools, unions, and society. Social justice caucuses develop, practice, and promote counter-hegemonic practices from the ground up, sharing commonalities with grassroots, labor, and social movement organizations. The most well-known example of these caucuses is the Caucus of Rank-and-File Educators (CORE) in Chicago, which gained national attention for fighting school closures, winning elected leadership positions in the Chicago Teachers Union in 2010, and leading the 2012 and 2016 Chicago teachers' strikes.

Over twenty social justice caucuses have developed since CORE was founded in 2008, and in 2014 representatives from several of these caucuses formally came together to found a national network called the United Caucuses of Rank-and-File Educators (UCORE), building on over two decades of informal organizing between educators in the United States and Canada. Since this network was founded in 2014, it has fostered the development of new caucuses across the United States as well as the spread of counter-hegemonic policies and practices. Caucuses within the UCORE network have likewise led major struggles for educational and social justice, including several actions in the strike wave that spread across the United States in 2018 and 2019, as detailed in Chapter 2.

In highlighting the work of UCORE, I am understanding this network as a counter-hegemonic solidarity network that directly confronts the neoliberal policy networks detailed by leading scholars in the field of critical policy studies (e.g. Au & Ferrare, 2015; Ball, 2014) as well as systemic racism and other power structures that maintain inequalities and thwart democracy in unions, schools, and communities. Caucuses organizers in the UCORE network have tirelessly organized for democracy and justice in their local contexts and at the state and federal levels, organically developing actions and campaigns that confront such targets as business-style union leaders, unelected school board representatives, pro-privatization mayors, anti-labor state legislators, and neoliberal federal administrators.

I am also understanding UCORE as a key network within the development of new forms of unionism and contemporary social movements. As detailed in Chapter 3, most social justice caucuses both enact and promote a new form of unionism that has

alternately been discussed as social justice and social movement unionism (NCEA, 1994; Weiner, 2012). Just as significantly, social justice caucuses in the UCORE network have developed and engaged in what I term contemporary educator movements: social movements aimed at transforming not only educators' unions but also schools and society as a whole. These social movements share much in common with the "movements of movements" (Sen, 2017) that have developed over the past thirty years, which enact a "contemporary logic of resistance," using democratic processes to engage in a wide range of struggles for justice, centering both anti-racist and anti-capitalist principles throughout this work (Wolfson, Treré, Gerbaudo, & Funke, 2017, p. 397). Moreover, these movements are directly linked to local, national, and global movements, including Occupy and Black Lives Matter. As social movement organizations, social justice caucuses have been central to the development and spread of contemporary educator movements, and the UCORE network itself has been fundamental to the growth of these movements.

Dissertation Purpose

In this dissertation, I use the methodology of militant ethnography to offer a "movement-relevant" (Bevington & Dixon, 2005) analysis of the work of social justice caucuses in the national UCORE network from 2015-2019. Drawing on over four years of field work within this network, I explore how organizers have conceptualized the purpose of social justice caucus organizing as their work has developed throughout this period, bringing educators' perspectives into dialogue with major frameworks in the fields of educational studies, labor studies, and social movement studies. I also discuss several explanations for the variations between how educators conceptualize and enact

the purpose of their work. Moreover, building on research in educational studies and labor studies, I note the ethical principles that characterize educators' work in the UCORE network, as well as discussing how organizers use these principles to frame, guide, and evaluate their work. I also build on social movement literature to explore the ten key cultural practices that educators have organically developed throughout this period to build the power necessary to transform their unions, schools, and broader society. I further illuminate how some of these same practices enable the movement of policies between social justice caucuses across the United States, with organizers developing strong relationships that allow them to share their learning and support each other's work. Lastly, I consider the implications of the UCORE network's work for the history of labor organizing and educational change in the United States, reviewing the significance of my findings.

Dissertation Structure and Major Findings

This dissertation is divided into three major parts. In Part One, I introduce my research focus, offer background information, discuss my conceptual framework, and review the methodologies that I've used in this project. In Chapter 1, "Introduction," I offer context for the UCORE network and review my major findings. In Chapter 2, "Teachers' Unions and the Development of Social Justice Caucuses," I offer a brief history of educator unionist organizing in the United States leading up to the development of the UCORE network and the recent educator uprisings of 2018 and 2019.

In Chapter 3, "Conceptualizing Social Justice Caucuses and the UCORE Network," I review the literatures in educational studies, labor studies, social movement studies, and critical policy studies to frame my discussion of caucus organizing and the

UCORE network. A major argument in this framework is that social justice caucus organizing represents a significant form of educator activism, a major development in the history of social movement or social justice unionism, and a driving force in contemporary educator movements. Another key argument in this chapter is that the UCORE network is a counter-hegemonic policy network directly confronting the neoliberal policy networks detailed by Ball (2014) and others. In Chapter 4, "Research Design," I introduce the key methodology I have employed in this project, militant ethnography, as well as reviewing other methodologies that have informed my work, such as multi-sited and network ethnography. I also detail the strategies I have used to collect and analyze data throughout this project.

In Part Two, "The Purpose and Principles of Social Justice Caucuses," I discuss my findings on the purpose of social justice caucus organizing as well as the key ethical principles educators use within this organizing. In Chapter 5, "The Purpose of Educator Organizing in Social Justice Caucuses," I review how educators in the UCORE network have conceptualized the purpose of social justice caucus organizing as this model has developed from 2015 to 2019, bringing their perspectives into dialogue with research in the fields of educational studies, labor studies, and social movement studies. A significant finding in this chapter is that between 2015 and 2019 most social justice caucuses have organized in order to build the power necessary to democratically transform their unions and advance justice in schools and society. In Chapter 6, "Explaining Variations in the Purpose of Social Justice Caucuses," I build on the previous chapter to explore several significant explanations for the differences between how caucus organizers explain and enact the purpose of their work, highlighting some of the key tensions and questions that

organizers navigate throughout their organizing. These include differences between the ideologies of organizers, sociopolitical contexts of caucuses, relationships between each caucus and their related union, and phases of caucus development. In discussing the final possibility, I draw on the social movement literature to argue that caucuses move through five iterative phases of development: emerging, coalescing, broadening, institutionalizing, and fragmenting.

In Chapter 7, “Ethical Principles and Social Justice Caucuses,” I transition between my discussion of the purpose and practices of social justice caucus organizing, turning my attention to four key ethical principles that caucus organizers evoke, as well as discussing how they use these principles throughout their work. In this chapter, I find that social justice caucus educators draw on the ethical principles of care, democracy, justice, and solidarity throughout their organizing, using these principles to frame, guide, and evaluate their collective efforts. In suggesting how educators use these principles, I point toward my discussion of caucus organizers’ practices in the next part of this dissertation.

In Part Three of this dissertation, “Cultural Practices and Policy Mobility in the UCORE Network,” I turn my attention toward the key practices organizers have developed over the past four years to build power in their caucuses, as well as discussing how some of these same practices enable policies to move between caucuses. In Chapter 8, “The Cultural Practices of Educator Organizing in Social Justice Caucuses,” I argue that ten cultural practices characterize social justice caucus organizing between 2015 and 2019: 1) connecting with other educators; 2) gathering together; 3) sharing stories and resources; 4) engaging in dialogue; 5) identifying issues; 6) developing norms; 7) forging

a collective identity; 8) leading campaigns; 9) linking struggles; and 10) reflecting on organizing. In discussing these practices, I note that they have developed organically from the ground up as caucus organizers have engaged in contentious struggles in their local contexts, confronting inequalities in their unions, schools, and communities. Moreover, I connect these practices to research in the fields of educational studies, labor studies, and – in particular – social movement studies.

In Chapter 9, "Policy Mobility Across the UCORE Network," I build on my findings in Chapter 8 to discuss how some of these same practices enable policy mobility between social justice caucuses across the United States. Specifically, I argue that the practices of connecting with other educators, gathering together, sharing stories and resources, engaging in dialogue, developing norms, and linking struggles have been particularly important to the spread of social justice unionist practices and policies across the United States, as well as the development of contemporary educator movements. In exploring how policies move across a counter-hegemonic network, I engage particularly with research in the fields of critical policy studies and social movement studies. Finally, in Chapter 10, "Conclusion," I review my major findings, discussing how they build on the literatures reviewed in my conceptual framework and exploring their significance for organizers and scholars.

Significance of Findings

By discussing the purpose, principles, and practices of social justice caucus organizing, this dissertation contributes to the literatures on educator engagement in activism, social justice unionism, and social movements. It also contributes to organizers' ongoing reflections about their work, both documenting key questions within caucuses

and the broader UCORE network as well as suggesting some potential insights into these questions.

CHAPTER 2: Teachers' Unions and the Development of Social Justice Caucuses

> *The patterns that we were seeing were that these were the schools that were being targeted for a turnaround that were into policies of union busting, and firing of very experienced educators, most of whom were very active in the union, most of whom were teachers of color, most of whom were women. And this was kind of awakening for me, all the while kind of learning about unionism and union history as well as kind of revisiting Pedagogy of the Oppressed.* (A. Heenan, personal communication, May 30, 2015)

> *I think a lot of people view it as this thing that's just sprung up. But to me, I view it as – the most immediate thing that I would point to is CTU, and what they did in 2010 and how people like Karen Lewis were just really transforming what education unions look like, teachers' unions look like. So that to me is, I would have said the continuation of that.* (N. Karvelis, personal communication, May 15, 2019)

The UCORE network currently includes over twenty social justice caucuses from across the United States, including Baltimore's Baltimore Movement of Rank-and-file Educators (BMORE), Chicago's Caucus of Rank-and-File Educators (CORE), Los Angeles's Union Power (UP), Massachusetts's Educators for a Democratic Union (EDU), North Carolina's Organize 2020 (O2020), Oakland's Classroom Struggle, Philadelphia's Caucus of Working Educators (WE), Seattle's Social Equity Educators (SEE), and West Virginia's West Virginia United (WVU) caucus. When the network was officially founded in 2014, several of these caucuses had not yet been formed. Indeed, the network has played an instrumental role in the development of social justice caucuses and the spread of social justice unionist practices across the country. Moreover, by following a social justice unionism (SJU) or social movement unionism (SMU) model, caucuses in

this network have demonstrated the potential for educators to collectively engage in and lead social movements for educational and social justice. To provide context for their work, I will briefly trace the history of the relationship between teachers' unions and social movements, from antecedents of social justice unionism in the first teachers' unions to the development of the UCORE network and growth of contemporary educator movements.

Social Movements and Teachers' Unions

In working to transform their unions, schools, and society, educators in the UCORE network are participating in a long-standing tradition of rank-and-file educator organizing within social movements. The earliest teachers' unions shared close ties to the most significant social movements of the early twentieth century, including the first-wave feminist movement and the labor movement. Indeed, many of the key organizers of the first-wave feminist movement worked as educators (Murphy, 1990). Moreover, many educators saw unionization as a crucial strategy for improving the working and living conditions of women. This was especially clear in the organizing of Margaret Haley in the Chicago Federation of Teachers. While serving as Vice President of that association alongside President Catharine Goggin, she modeled some of the ambitious women-led rank-and-file organizing that the Chicago Teachers Union (CTU) would become known for under Karen Lewis over a century later. Although Haley never took a clear stand on racial justice (Rousmaniere, 2001), she advanced democracy, gender equality, and economic justice in her union, schools, and broader society: organizing for equitable wages and suffrage for women, progressive taxation to fund schools, democratic education governance, and greater gender representation within the National Education

Association (NEA) (Murphy, 1990; Rousmaniere, 2005; Weiner, 1996). In doing so, she prefigured some of the central tenets of the social justice or social movement unionism model developed by social justice caucuses over one hundred years later.

When the NEA formed in 1857, it distanced itself from the developing labor and first-wave feminist movements, representing the interests of predominantly male education leaders rather than predominantly female teachers. Moreover, it framed itself as a professional association rather than a union (Murphy, 1990). As a professional association, the NEA had a complicated relationship with the developing focus on professionalism in the progressive movement, at once working to legitimize teaching as a profession within an increasingly bureaucratized, top-down system while also pushing back against policies that limited the autonomy of educators, such as the use of test scores in teacher evaluations (Murphy, 1990; Tyack, 1974). As Urban (2000) notes, however, this focus on professionalism was linked to educators' investment in both their own working conditions and some elements of the common good: "professionalization also had more substantive meanings for the NEA, two of which were notions of improving occupational standards and serving school children and, thereby, the larger society" (p. xix). Thus, while the NEA did not explicitly organize as a union until the 1970s, there were labor and social justice dimensions to its work throughout the twentieth century, although these did not include racial justice until the end of that period (Urban, 2000).

The second-largest teachers' union in the United States, the American Federation of Teachers (AFT), had direct connections to the labor movement when it was founded. The AFT was formed as a trade union affiliated with the AFL (American Federation of Labor) in 1916, building on the organizing of urban locals in Chicago (Shields, 2009).

When the AFT formed, the NEA shifted some of its focus toward recruiting educators, and both organizations competed for membership in the decades to come, with the AFT building strong urban locals more closely tied to trade unions and the NEA building more centralized offices at the state and national levels (Murphy, 1990). In the early twentieth century, both organizations maintained some of these respective differences while negotiating shared challenges and conflicts. Both organizations, for example, found themselves torn between many educators' working class, union roots and their aspirations for higher status through professionalization in the progressive movement (Murphy, 1990).

Teachers' unions continued to grow through the first half of the twentieth century, in some cases struggling on behalf of their communities and in others distancing themselves from their labor movement roots. In the years leading up to the Great Depression, the AFT and NEA struggled to define themselves in opposition to each other and to trade unions (Murphy, 1990), while educators found themselves facing overcrowded classrooms with underfed students. In Chicago, educators organized to collect money and clothing for their students and provided free breakfasts, despite their own low pay (Lyons, 2008). Throughout this time, factions developed within the AFT and NEA that advocated divergent paths for their organizations, with some educators advocating for professionalism and legislative influence, others for bread-and-butter unionism prioritizing educators' compensation, and others for a more radical unionism linked to socialist principles (Murphy, 1990). In the meantime, bottom-up, rank-and-file organizing continued in other unions across the United States, with workers winning more equitable labor laws. These laws did not immediately transform teachers' unions,

however. While Congress passed the National Labor Relations Act (NLRA) in 1935, teachers' unions and other public sector unions were left out of the promise of collective bargaining rights. Although teachers' unions did not make the same collective bargaining gains as trade unions, they did participate in the AFL's troubling efforts to purge communists from labor organizations, pushing out such locals as New York's Teachers Union (TU) from the AFT in 1941 (Murphy, 1990; Lyons, 2008; Taylor, 2010).

In the 1950s, there was a shift toward what has been called business unionism among many U.S. unions. Generally speaking, teachers' unions embraced this model, which is sometimes referred to as the service model and is characterized by a focus on "collective bargaining, enforcement of the contract, and representational and other group services (health plans, insurance, group legal services) for the union member" rather than a focus on organizing, mobilizing, or participating in broader social movements (Turner & Hurd, 2001, p. 14). Most locals followed this model, directing their energies toward bread-and-butter issues such as compensation and health insurance rather than engagement in social movements.

While educators' unions at both the national and local levels primarily followed a business unionism model, they occasionally engaged in broader struggles for – and, in some cases, against – civil rights. In doing so, teachers' unions and educator unionists alternately supported and undermined the civil rights movement. The AFT drafted an *amicus brief* supporting the plaintiffs in the landmark case *Brown v. Board of Education* (Kahlenberg, 2007), however the union did not support affirmative action and gained a poor reputation around racial justice after the 1968 strike of New York's United Federation of Teachers (UFT), when educators took a controversial stand for their own

labor rights and against community control of schools for Black and Latinx community members (Goldstein, 2014; Hagopian & Green, 2012; Winslow, 2010). Conversely, despite its origins as a professional organization representing more privileged educators, the NEA demonstrated a stronger stance on racial justice beginning in the 1960s, actively supporting desegregation and affirmative action and electing its first Black president in 1967 (Murphy, 1990; Winslow, 2010). This focus on desegregation was secondary to its focus on building toward unionization, however (Urban, 2000).

Other local educator organizations and unions took more notable stands for racial justice and civil rights in schools during this period. Black educators' organizations successfully won common good demands ranging from better school buildings to higher grades of secondary education to fairer educator salaries in the pre-*Brown* South, for example (Walker, 2005, 2013). Moreover, Black activist educators supported the long civil rights movement through their work in the classroom and extracurricular programs, supporting the political consciousness of students who would go on to lead the movement (Baker, 2011; Hyres, 2018; Loder-Jackson, 2015). New York's Teachers Union likewise established a strong record on racial justice and civil rights after being expelled from the AFT, engaging in community and rank-and-file organizing against segregation and racism before disbanding in 1964 (Hagopian & Green, 2012; Taylor, 2010). Both Black educators' common-good organizing and the community organizing of Teachers Union could therefore be considered important antecedents to the social justice unionism model(s) that developed beginning in the late twentieth century.

In addition to advancing racial equity, NEA locals also demonstrated a stronger commitment to rank-and-file organizing in the period that labor scholars refer to as the

"long seventies," when public sector unions such as the AFT and the NEA benefited from an upsurge in rank-and-file organizing (Winslow, 2010). Throughout this period, teachers' unions grew rapidly, with the NEA experiencing a particularly impressive expansion outside of urban centers. Militant locals in both unions led notable strikes for collective bargaining rights and fair wages (Johnston, 1994; Murphy, 1990; Shelton, 2017), with as many as 80 percent of these strikes being led by NEA locals (Winslow, 2010). Most of these strikes focused on bread-and-butter issues such as teacher compensation, which generally benefited students and communities insofar as they helped retain and recruit quality educators but did not directly address other forms of inequality. This militant, rank-and-file educator organizing can also be seen as an antecedent to the militant organizing of educators in social justice caucuses and, particularly, the organizing of rank-and-file networks in the strikes of 2018 and 2019. Nevertheless, it is worth noting that this organizing generally did not focus on common good or social justice demands, which are integral to social justice caucus organizing and many contemporary educator movements.

While many of the major strikes of the "long seventies" were led by the rank and file, teachers' unions did not witness the same expansion of caucuses as other sectors. A number of caucuses did form in urban centers such as Chicago and New York, however. Chicago teachers formed a series of independent organizations and caucuses to advance economic, educational, and racial justice in their unions in the 1960s and 1970s, ranging from Teachers for Radical Change in Education, the Black Teachers Caucus, the Teachers Action Caucus, and the United Progressive Caucus, which gained the top leadership positions in the CTU and would hold them for over thirty years, losing both its

racial justice focus and much of its militancy over the course of those decades (Simpson, 2012; Uetricht, 2014). Likewise, in New York City, a range of dissident caucuses formed to challenge the long-dominant Unity caucus, including New Action and the Coalition of School Workers (Brogan, 2016). Nevertheless, teachers' unions did not develop any caucuses with the extensive program of caucuses like Teamsters for a Democratic Union (TDU), which was founded in 1976 (Winslow, 2010). Moreover, educators' caucuses in this period did not employ the bottom-up, militant rank-and-file organizing focus of TDU or later educator caucuses, and they did not develop platforms that integrate a range of principles such as democracy, economic justice, educational equity, and racial justice.

Toward the end of the century, teachers' unions generally continued to follow a business-style approach to unionism, focusing on bread-and-butter issues and teacher professionalism despite dramatic policy changes reshaping the nature of teachers' work. Beginning with 1983's A Nation at Risk, federal, state, and city education policies emphasized standardization, choice, testing, evaluation, and market-based reforms, and unions at both the national and local levels largely accepted these reforms. While the national leadership of the AFT and the NEA did little to challenge these reforms, in many cases speaking in support of them, a small number of education scholars and organizers challenged them, calling for an alternative model for teachers' unionism. In doing so, they built on the call for a new model of unionism among labor organizers and scholars, including Waterman's proposal of the model of "social movement unionism" in 1989 as an alternative to the still-dominant paradigm of business unionism (Waterman, 2008).

During this period, activist educators in the United States collaborated to articulate a comparable new model of unionism: social justice unionism. In 1994, the

National Coalition of Education Activists (NCEA) met to develop a vision for social justice unionism, which was published in a statement in *Rethinking Schools* magazine. As part of their statement, they identified "key components of social justice unionism," articulating such ideas as organizing alongside parents, students, and broader communities; changing the culture of teachers' unions to prioritize bottom-up democracy; centering educator perspectives in education policymaking; promoting critical, progressive, and anti-racist pedagogies; and engaging in "constant, grass-roots education and organizing" to "fight for social justice in all areas of society." In a later article discussing this statement, Bob Peterson (1999) noted that social justice unionism was "committed to a bottom-up, grassroots mobilization — of teachers, parents, community, and rank-and-file union members" (p. 16). While this model of social justice unionism was largely discussed as a new paradigm in the late 1980s and early 1990s, it 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" (Rottmann, Kuehn, Stewart, Turner, & Chamberlain, 2015; Winslow, 2010).

The vision for social justice unionism that NCEA developed in 1994 also previewed the principles that social justice caucuses would center in their organizing in the decades to come, and many UCORE educators specifically cite this statement and Bob Peterson's publications in *Rethinking Schools* as foundational texts in this work. While the educators who offered this vision predicted that it would become more

necessary in the face of rising social inequalities and neoliberalism, they did not preview the ways that this model would develop and spread from the ground up through social justice caucuses in the decades to come.

Social Movements and Social Justice Caucuses

In the years following this NCEA meeting, educators in cities across the country formed social justice caucuses that both developed and enacted this form of social justice unionism. While these caucuses use a model that could aptly be described as "social movement unionism" (Weiner, 2012), I will be using the terms "social justice unionism" and "social justice caucus" to describe their organizing because this is how many organizers in these caucuses conceptualize their own work, in some cases citing the original NCEA statement. As I argue in Chapter 5, social justice caucuses can be understood as groups of unionist educators and their allies who are committed to building their collective power to advance democracy, economic justice, and racial justice in their schools, unions, and society as a whole. Moreover, as I argue in Chapter 3, social justice caucuses can be understood as social movement organizations (SMOs). As a key caucus organizer in the UCORE network argues, these groups are distinct from affinity caucuses and electoral caucuses in teachers' unions in that they "could actually be a movement and continue as a movement" (field notes, August 9, 2019).

Over the course of the past three decades, as the first social justice caucuses formed, radical educators throughout the world supported and participated in a wave of social movements that would transform educator organizing in the U.S. In the late twentieth and early twenty-first centuries, the Global Justice Movement (GJM) coalesced through such major struggles as the protests against the 1999 World Trade Organization

meeting in Seattle. Organizers in this movement also came together at global forums such as the annual World Social Forums that began in Porto Alegre, Brazil in 2001. Because this movement brought together organizers from a range of global struggles –particularly movements focused on economic and environmental justice – activist and author Naomi Klein famously termed the Global Justice Movement the "movement of movements" (Chihara, 2002). This framing has become a popular way to conceptualize the Global Justice Movement (e.g. Mertes & Bello, 2004) and has informed scholarship on a wide range of social movements in this period.

Scholars have built on this framing to conceptualize the major social movements of the past three decades as "movements of movements" that bring together heterogeneous groups committed to such issues as economic, educational, environmental, and racial justice (see Sen, 2017). These movements demonstrate a "contemporary logic of resistance" that centers a range of social issues (Wolfson et al., 2017), drawing on the politics of both representation and redistribution (Fraser, 1990). Moreover, these movements are characterized by their growth through networks, their use of social media alongside traditional organizing tools, and their development of horizontal and democratic organizing practices (Juris, 2008; Wolfson et al., 2017). These characteristics can be seen in major U.S. social movements that educators have engaged in throughout this period, including Occupy and Black Lives Matter. Furthermore, as I argue further throughout this dissertation, they can be seen in the work of caucus organizers within their local contexts and across the UCORE network.

The first social justice caucuses developed in the 1990s, but it wasn't until the next decade that caucuses would begin to win leadership positions in their unions and

build the movements called for in the original NCEA statement. In the early 1990s, progressive Los Angeles educators in United Teachers-Los Angeles (UTLA) developed one of the first notable social justice caucuses, which was originally named Second Opinion and published a newspaper with leftist perspectives on educational and social justice. Second Opinion organizers directly confronted neoliberal and racist education policies, including school closures, high stakes testing, and charter expansion, especially as these policies accelerated with the lift of the charter cap in California in 1998 and the passage of No Child Left Behind in 2001 (Warner, 2016; Winslow, 2014). In the early 2000s, Second Opinion organizers renamed their caucus Progressive Educators for Action Caucus (PEAC), successfully running for elected union positions in the joint United Action slate in 2005 (Jordan, 2005; Bartlett, 2019). As detailed in a 2007 feature in the *Los Angeles Times*, PEAC organizers hoped to use their new leadership positions to transform their union as part of a broader social movement for public education: "UTLA should reinvent itself as the base for a social movement that would engage in aggressive organizing of parents and communities, confront even friendly politicians and use militant tactics rarely employed by staid public employee unions" (Mathews, 2007). While the United Action administration was voted out in the next election, arguably due to ideological differences between members, dissidents in the PEAC caucus would continue to pursue this goal in the years to come (A. Inouye, personal communication, August 7, 2015; G. Russom, personal communication, May 13, 2019).

In the years following Second Opinion's formation, educators in other cities across the United States increasingly faced the same neoliberal and racist policies that had inspired the caucus to form, including school closures and high-stakes testing. Major

cities across the United States, including Chicago, New Orleans, New York, Oakland, and Philadelphia were used as testing grounds for neoliberal education reforms, including market-based portfolio models that mandate school "turnarounds" and closures, disproportionately affecting students and educators of color (Buras, 2014; Lipman, 2011; Saltman, 2007; Spreen & Stark, 2014). Standardization, choice, and accountability policies were further incentivized in states across the country through the federal No Child Left Behind Act of 2001 (NCLB, 2002), which emphasized the use of high-stakes tests in student, teacher, and school evaluations. Although the president of the NEA did speak out against No Child Left Behind (NEA, 2008), the leaders of both national teachers' unions failed to develop an effective strategy for mobilizing their members against these policies. Later that same decade, the competitive Race to the Top program (U.S. Department of Education, 2009) further accelerated the spread of neoliberal policies beginning in 2009, offering grants to states that adopted the same market-based reforms that had been piloted in Chicago and other cities. The leadership of both teachers' unions failed to challenge this reform, as well, with AFT President Randi Weingarten giving a statement strongly supporting Race to the Top (AFT, 2010).

With the national leadership of the AFT and the NEA failing to combat the "global assault" on public education (Compton & Weiner, 2008), rank-and-file educators and organizers began to meet and discuss how they might be able to collectively respond to these policies from the ground up. More than ten years after Second Opinion formed, education unionists met again in Los Angeles in 2008 for the Trinational Coalition, which brings together union representatives from Canada, Mexico, and the United States. There, organizers from progressive caucuses such as PEAC and social justice unions such as the

British Columbia Teachers' Federation (BCTF) met with educators from all three countries to share strategies. That same year, organizers from Chicago, the District of Columbia, New York, and Los Angeles also met at a "national gathering of reform teachers' caucuses" (Winslow, 2014). These discussions fostered significant learning among organizers hoping to support similar struggles within their own contexts, inspiring one of the founders of arguably the best-known social justice caucus: Chicago's Caucus of Rank-and-File Educators (CORE).

CORE was formed in 2008 by educators who were organizing in solidarity with parents and community members in the Kenwood Oakland Community Organization (KOCO) against school closures. After unsuccessfully trying to push their union toward organizing its membership against closures and the related displacement of educators of color, founding members realized that they needed to form a caucus if they were to have any hope of transforming the Chicago Teachers Union into a union capable of fighting back against the neoliberal and racist attacks against Chicago's students, teachers, and schools (J. Johnson, personal communication, August 4, 2015; K. Mayle, personal communication, May 30, 2015; J. Potter, personal communication, August 9, 2015). Before publicly announcing the formation of their caucus, CORE organizers participated in study groups on such texts as Naomi Klein's (2007) *The Shock Doctrine: The Rise of Disaster Capitalism*. After doing the work of the union for several years – calling mass rallies, leading political education around Tax Increment Financing (TIF), organizing against school closures, meeting with educators across the district – CORE won elected leadership positions in the CTU in 2010 (Bradbury, Brenner, Brown, Slaughter, & Winslow, 2014). After winning, they shifted the union toward an organizing, social

justice unionism model, developing research and organizing departments to institutionalize the work the caucus had led, including pointing out the racial dimensions of school closures and educator displacement (C. Caref, personal communication, July 27, 2015). Since CORE won leadership positions in the CTU, the caucus has continued to meet, navigating the challenges of growing their caucus when many of its key organizers are occupied with the responsibilities of running the CTU (M. Gunderson, personal communication, July 28, 2015; D. Pope, personal communication, February 11, 2019). As discussed further below, these responsibilities have included organizing such notable collective actions as the landmark 2012 Chicago teachers' strike, the intersectional 2016 Chicago teachers' strike, and the groundbreaking 2019 Chicago teachers' strike, which is detailed later in this chapter.

Inspired in part by CORE's success, several other caucuses developed in major cities in the years following the formation of CORE. A key caucus in my militant ethnographic research and organizing, the Social Equity Educators (SEE), formed in Seattle in 2009 to push the Seattle Education Association (SEA) in a more militant, anti-racist direction. Under the direction of a Broad Foundation superintendent, Seattle Public Schools had been planning to close ten schools that predominately serve students of color, and the SEA leadership supported these closures. After unsuccessfully trying to change the union's position on school closures, a group of educators formed SEE and collaborated with community members to stop the closures of five schools through the grassroots Educators, Students, and Parents for a Better Vision (ESP Vision) organization. The SEE caucus later made headlines in 2013 when founding members organized a successful boycott against the MAP test, helping to spark the national Opt

Out movement. While SEE members unsuccessfully ran for leadership positions in their union the following year, they have gained some leadership positions on the union's board. Organizers have also used both grassroots organizing and union advocacy to shape policies around such issues as ethnic studies, immigrant rights, progressive school funding, racial justice, and union democracy. Likewise, SEE has advanced democracy and social justice in contract bargaining, organizing to support such demands as mandated recess time, racial equity teams, and health care for substitute educators (D. Trocolli, personal communication, August 8, 2015; J. Hagopian, personal communication, May 9, 2019). While the SEE caucus was originally named Social Equality Educators in solidarity with the 2009 March for Equality, which advanced LGBTQ rights, organizers renamed the caucus Social Equity Educators in 2017 to better align with their analysis of educational and social inequities (field notes, September 24, 2017).

In the two years after CORE formed and the wake of the Arab Spring, educators in cities across the country participated in anti-capitalist, pro-democratic, and pro-labor collective actions through the Occupy movement – which spread from New York to Oakland, Seattle, and other cities across the country –and protests to Act 10 in Wisconsin (Picower, 2013; Schirmer, 2019). In New York City, Occupy fostered an education-focused movement, Occupy the DOE (Picower, 2013), which Brogan (2016) notes "breathed fresh life into a teacher activist movement" as well as introducing many educators to the possibility of using their union as a vehicle for educational and social change. As CORE organizer Adam Heenan argues, these movements laid the groundwork for advances in both new and existing social justice caucuses, providing

"social media lessons, organizing lessons," and "framing" that would prove critical in such major struggles as the 2012 Chicago teachers' strike (personal communication, May 30, 2015). These movements would also spread the development of prefigurative, counter-hegemonic cultural practices that characterize organizing in many social justice caucuses, such as the use of progressive stack and consensus-based decision making (Picower, 2013). See Chapter 8 and Chapter 9 for more on the spread of counter-hegemonic cultural practices.

Within this context, contemporary educator movements continued to develop across the United States. In 2011, in between winning elected offices in the CTU and leading the historic 2012 Chicago teachers' strike, organizers in CORE began reaching out to educators in other contexts. Through this outreach, organizers in social justice unions and caucuses from such cities as Chicago, Los Angeles, New York, and St. Paul discussed social justice unionism and social justice caucuses, deciding to plan a conference to bring together dissident educators from across the country (field notes, August 9, 2015). At the National Conference to Fight Back for Public Education on July 6, 2011, "200 teachers from 15 states, Puerto Rico, Canada, and Mexico" met in Chicago to "find out how fights were being carried out in other cities" (Brenner, 2011). At this point in time, CORE organizers did not have the intention of developing a formal network, but rather "just wanted to be with other people doing the work" (field notes, August 9, 2015).

Many of these same organizers would come together again in the spring of 2012 to continue developing relationships and sharing stories and strategies from their work at the biannual meeting of Labor Notes, a labor network focused on rank-and-file

organizing that has been critical to the development of contemporary educator movements. There, Mark Brenner, the former director of Labor Notes, noticed connections between struggles across the United States and world in educators' conversations in conference workshops (M. Brenner, personal communication, September 13, 2015). According to a CORE leader, this sparked the idea of a potential national educator network: "he was hearing in meetings teachers having the same type of talk and the same kinds of approach to the attacks against us, and that he saw us in our separate locations: in CORE in Chicago, in PEAC in LA, in St. Paul, in Milwaukee, in all of our different contexts. He saw us talking the same talk, and that's when there was this thought, this idea of building a national network came to be" (field notes, August 9, 2015).

During this period, three new social justice caucuses formed: Oakland's Classroom Struggle, New Jersey's Newark Education Workers (NEW), and New York City's Movement of Rank-and-File Educators (MORE). The Oakland caucus began to form in 2011 as the Occupy Oakland Education Committee, which led a march for education in the midst of a major citywide, cross-sector strike on November 2, 2011, with almost twenty percent of Oakland educators participating in the strike (Democracy Now, 2011; Classroom Struggle, 2013). Educators in the committee published a newsletter and blog titled *Education for the 99%* (Classroom Struggle, 2013) that aimed to offer "strategy and analysis to defend and transform public education" (Classroom Struggle, 2011). They likewise organized alongside community members to occupy Lakeview Elementary School in Oakland, which was one of five schools slated for closure (C. Gordon, personal communication, June 28, 2019). In 2013, organizers renamed their

group and newsletter Classroom Struggle, noting that they hoped to recognize their "dual commitment to the struggle for radical changes in both our schools and our society at large" (Classroom Struggle, 2013). In doing so, they recognized both white supremacy and capitalism as the root causes of the systemic inequalities that plagued Oakland schools (Classroom Struggle, 2013). Since forming in 2011, Classroom Struggle would continue to support movements for educational, racial, and social justice in Oakland schools and broader communities. The group would also focus on democratically transforming the Oakland Education Association (OEA) into an organizing union, winning executive board and officer positions in the OEA in 2015, and winning additional positions in 2018 as part of the Build Our Power slate. Through their leadership positions at both the union and school level, Classroom Struggle organizers helped to lead the Oakland teachers' strike of 2019, with the caucus meeting less regularly as organizers' energies shifted toward the strike. Members are currently debating whether to reconvene their caucus or develop a new organization (Gordon, 2019; C. Gordon, personal communication, June 28, 2019).

The Newark Education Workers (NEW) caucus formed in Newark, New Jersey, in January of 2012. Inspired by the work of the CORE caucus in Chicago and building on the previous work of the Teachers as Leaders in Newark group, NEW educators ran for elected leadership positions in the Newark Teachers Union (NTU) in 2013, winning over half of the seats on the union's Executive Board (Association for Union Democracy, n.d.; Eidelson, 2012; Winslow, 2013). The NEW caucus frames itself as "a social movement-based caucus comprised of members of the Newark Teachers Union and the Newark community that is dedicated to three big goals: the revitalization of the NTU as a force

for social justice in Newark; the defense of public education from privatization and the support of market-free solutions to transform public schools; and the establishment of solidarity with education workers and the Newark community to improve living and working conditions in the city" (NEW, 2013). The caucus went on to host the 2015 UCORE conference, highlighting their work against neoliberal reforms and systemic racism in Newark. In collaboration with the National Resources Defense Council (NRDC), they have also co-sponsored an ambitious lawsuit against the city of Newark and state of New Jersey over the "dangerously high levels of lead in Newark's drinking water" (NRDC, 2018).

Like Classroom Struggle and NEW, New York's Movement of Rank-and-File Educators (MORE) formed in the wake of CORE's success and the Occupy movement. MORE held its first official meeting in the summer of 2012 in a Lower East Side bar, bringing together both new and veteran educators who had been active in the Independent Community of Educators (ICE) caucus, the Grassroots Education Movement (GEM) organization, the New York Collective of Radical Educators (NYCoRE) network, the Occupy the DOE movement, and the Teachers for a Just Contract (TJC) caucus (Brogan, 2016; Cersonsky, 2012; field notes, July 30, 2015). Like CORE, NEW, and SEE, MORE is committed to engaging in anti-racist community organizing against school closures and high-stakes testing (R. Frascella, personal communication, August 12, 2019), differentiating it from previous New York City reform caucuses (Cersonsky, 2012). MORE organizers have also developed a bottom-up strategy for supporting union democracy in the UFT, opposing undemocratic union policies, and speaking out against the governing UNITY caucus's history of supporting market-based education reforms

(field notes, August 20, 2015; Brogan, 2016). In many cases, this has included doing the work of the union, whether it be offering regular chapter leader trainings or developing research on working and learning conditions based on member surveys (field notes, August 20, 2015; MORE, 2016, May 11). MORE members have also run for elected positions in the UFT in 2013, 2016, and 2019 with some degree of success, winning seven high school board positions in 2016 through a joint slate with the New Action caucus (MORE, 2016, June 1). Like many other caucuses, MORE has faced both external and internal struggles, particularly in bridging the ideological divides between their core members, perhaps in part because of the history of the caucus bringing together educators with differing visions for the purpose of caucus organizing (see Brogan, 2016).

The same year that MORE formed, the Chicago Teachers Union's research and professional development–focused Quest Center published *The Schools Chicago Students Deserve* in February of 2012. In September of that year, the CTU led a historic strike for the vision they outlined in this report, directly confronting the racist neoliberal policies that had starved and reshaped Chicago Public Schools for decades (C. Caref, personal communication, July 27, 2015; J. Johnson, personal communication, August 4, 2015; K. Mayle, personal communication, May 30, 2015; J. Potter, personal communication, August 9, 2015; T. Vinson, personal communication, July 1, 2019). In the years building up to the strike, the CORE-led CTU had built a sophisticated organizing structure across Chicago Public Schools, developing Contract Action Teams at every school that enabled communication with and from the rank and file. They also organized a series of "structure tests" in preparation for the strike (McAlevey, 2016, p. 131), including gaining signatures for a letter demanding resources for schools, leading a campaign for educators

to wear red every Friday, administering mock strike votes, and organizing a massive downtown rally (Bradbury et al., 2014).

From June 6th to June 8th of 2012, CTU leaders held a strike vote that far exceeded the 75% threshold set by recent anti-labor legislation in Illinois Senate Bill 7, with 98% of voters authorizing the strike, representing 90% of the CTU's total teaching force (Bradbury et al., 2014; Uetricht, 2014). Although the school board had met the CTU's bread-and-butter demands, the CTU called for a strike on September 9th to stand up for the vision they had outlined in *The Schools Chicago Students Deserve*, organizing for such demands as more reasonable class sizes, enrichment opportunities for all students, and wrap-around services in schools. CORE educators gained strong support from their community allies in the strike, including parents, students, and community organizers who they had collaborated with throughout the school closure fights, as well as grassroots and labor allies who they had collaborated with throughout such struggles as the Occupy movement (Bradbury et al., 2014). As outlined in seminal texts on the strike, including *How to Jump-Start Your Union* (Bradbury et al., 2014), *Strike for America* (Uetricht, 2014), and *No Shortcuts* (McAlevey, 2016), the 2012 Chicago teachers' strike offered a powerful model for building rank-and-file educators' power to democratically and collectively stand up for the schools their students deserve. This model would prove extraordinarily influential for educators across the country in the years to come, sparking a new wave of social justice caucus development and fueling the spread of contemporary educator movements.

UCORE and Contemporary Educator Movements

Following the historic Chicago teachers' strike of 2012, rank-and-file educators across the country were inspired to transform their own unions and fight for common good demands that benefit educators, students, and community members. In the months following the strike, CORE members offered support to organizers in other contexts who were interested in learning how to apply these lessons in their locals, in many cases driving and flying across the country to meet with them. One day, four of these organizers – Adam Heenan, Debby Pope, Michelle Gunderson, and Xian Barrett – met at the Jackalope Coffee and Teahouse in the Bridgeport neighborhood of Chicago to reflect on the work they were doing, and they realized that they had "the biggest target" on their backs because their work challenged the leadership of the national educators' unions (field notes, August 9, 2015). As one of these organizers noted in a participatory oral history of the UCORE network at the 2015 conference, this inspired them to take steps toward forming a national network:

> We said, "you know, we don't want to do this alone." So, Xian opened up his laptop and he opened up an excel document and you people's names were on it. And we just started calling people: "Would you like to do this work? Would you like to be part of national work? How are things going in your local? Would it help for you to know other people around the country?" And that's how we did it. (field notes, August 9, 2015)

Through these conversations, CORE organizers took important steps toward developing a formal network to address their collective struggles. Organizers in the CORE caucus also shared lessons from their work in popular publications throughout this period, including *How to Jump-Start Your Union* (Bradbury, et al., 2014).

In 2013 and 2014, Chicago educators worked with Labor Notes, a labor network focused on rank-and-file organizing, to host two unpublicized, invitation-only meetings

to discuss the possibility of forming a national network. At the first meeting, which the hosting CORE caucus framed as a "conference for social justice unionism," organizers from California, Massachusetts, New Jersey, New York, North Carolina, Minnesota, Pennsylvania, and Washington state shared struggles from their own contexts and strategies for fighting back (Winslow, 2013; field notes, 9 August 2015). They also discussed crucial questions driving their collective work such as "How do we combine bread-and-butter union issues with social justice and education justice?" (Winslow, 2013). At the second meeting, which was held in conjunction with the 2014 Labor Notes conference, Al Ramirez of the CORE caucus put forward a successful motion to officially form a network. Participants spent twelve hours democratically developing the central points of the network's mission statement, which were adapted into a formal mission statement by Massachusetts organizer Barbara Madeloni (field notes, August 9, 2015). The mission statement that they developed echoed many points from the original NCEA definition of social justice unionism, including its focus on grassroots labor organizing for democracy and equity in schools and society:

> We are social justice educators and unionists committed to creating schools and workplaces that advance economic justice, racial justice, and democracy. We call for equitable public education as a human right. We assert that the workplace rights of educators are an essential element of public education and that the well-being of communities in which our children live is as much a part of our mission as the work we do in our schools.

In democratically developing this shared statement for the network, organizers were offering both a vision for social justice caucus organizing as well as a model for how to democratically create similar guiding documents in local contexts.

Over the course of the two years that the UCORE network developed, new social movements continued to develop in the United States. Most notably, this period coincided with the growth of the Black Lives Matter movement, which developed in the wake of the 2013 acquittal of George Zimmerman for the 2012 murder of teen Trayvon Martin (Black Lives Matter, n.d.) This movement continued to grow in 2014, with historic protests in Ferguson, Missouri, against the fatal shooting of Michael Brown by a Ferguson police officer. Social justice caucuses and unions would support this movement in a range of ways in the years to come, including a one-day strike led by Black Lives Matter, the Fight for $15, and the Chicago Teachers Union in the spring of 2016 as well as the spread of Black Lives Matter at School campaigns across social justice caucuses beginning in Seattle in the fall of 2016 (field notes, April 1, 2016; field notes, September 18, 2016). See Chapter 9 for more on the spread of Black Lives Matter at School campaigns.

During this same period that the UCORE network coalesced and the Black Lives Matter movement developed, several new caucuses formed both alongside and through the broader UCORE network. These caucuses include Los Angeles's Union Power, North Carolina's statewide Organize 2020, and Philadelphia's Caucus of Working Educators. Moreover, through its connections to the UCORE network and Labor Notes, the statewide Educators for a Democratic Union caucus transformed to bring in new K-12 members and win the presidency of the Massachusetts Teachers Association. These caucuses would lead major struggles that would inspire both new and existing social justice caucuses in the years to come.

North Carolina's Organize 2020 caucus grew out of the 2013 Moral Monday movement in North Carolina, which used civil disobedience and mass demonstrations to protest regressive state policies on education funding, environmental justice, racial justice, social programs, taxation, and voting rights. Realizing that their educators' union, the North Carolina Association of Educators (NCAE), was not supporting this movement, a small group of educators began collecting the contact information of school employees who were participating in Moral Monday actions. Taking inspiration from the CORE caucus's transformation of the Chicago Teachers Union, they decided to organize "teacher-to-teacher, person-to-person, parent-to-parent, [and] building-to-building" to transform their union (field notes, August 9, 2019). Soon after meeting in the Moral Monday movement and developing their statewide caucus, these educators attended the 2014 informal network meeting at Labor Notes in Chicago. In the years to come, they would win elected leadership positions in such locals as the Durham Association of Educators and host the 2016 UCORE conference. Organize 2020 educators have also organized several statewide walkouts and days of action with demands that align with the common good priorities of the Moral Monday movement.

Philadelphia's Caucus of Working Educators (WE) developed informally throughout 2013 and 2014 with support from organizers in the CORE caucus and other educators attending the proto-network meetings in Chicago. On Pi (π) Day or March 14 of 2014, the caucus officially formed, bringing together organizers who had been active in protesting neoliberal education policies in the School District of Philadelphia, radical educators who had advanced progressive and anti-racist pedagogies through Teacher Action Group (TAG), and teacher unionists who were frustrated by the lack of organizing

and democracy within their union, the Philadelphia Federation of Teachers (PFT). In the years to come, WE members would develop a sophisticated organizing structure, with regional and building-based meetings throughout the city. They would also develop a range of significant committees and campaigns, including a Racial Justice Committee and the first week-long Black Lives Matter Week of Action (T. Anderson, personal communication, June 3, 2019). Caucus members led an ambitious campaign to win leadership positions in the PFT in 2016. Building on lessons from that campaign and the strategies developed through successful campaigns in Chicago and Los Angeles, they are preparing for another election for 2020 ("C. Green", personal communication, March 16, 2019; L. Pahomov, personal communication, May 14, 2019).

During this same period, organizers in Los Angeles's PEAC caucus took major steps toward realizing the goals they had outlined through their work over the past two decades. Regrouping after losing the UTLA leadership positions they had gained through the ideologically divided United Action slate, they decided to form a new joint slate, Union Power, as part of a campaign to win leadership positions in UTLA. This slate built on the recent steps they had taken toward building a social movement of educators, parents, students, labor organizations, and community allies. In 2013, they had developed the Schools L.A. Students Deserve Coalition through a UTLA resolution and referendum in 2013, which was cosponsored by such groups as the Latino Caucus and the Coalition for Educational Justice and inspired by the Chicago campaign of a similar name (Winslow, 2014). Upon winning elected union positions in UTLA in 2014, PEAC organizers hoped to reform their caucus under the same name as their Union Power slate (A. Inouye, personal communication, August 7, 2015; G. Russom, personal

communication, May 13, 2019). They would have trouble building an independent caucus while holding leadership positions in the union, however, with organizers meeting irregularly in the midst of the caucus's contract campaign and strike (G. Russom, personal communication, May 13, 2019; field notes, May 12, 2019).

Over the course of the group's leadership, however, they successfully transformed UTLA into an organizing union committed to social justice unionist principles. This has included collaborating with community members to lead a campaign for the Schools LA Students Deserve, developing the Reclaim Our Schools community-union coalition, and adding a Parent-Community Organizer position (A. Inouye, personal communication, August 7, 2015). Union Power leaders also moved toward a Bargaining for the Common Good model, developing a platform for "bargaining for the schools LA students deserve" and involving community members in bargaining (field notes, September 24, 2018; UTLA, 2017). This organizing helped make the union's February 2019 strike a historic success for the social justice unionism model, with the union winning such common good demands as green space on campus and a decrease in the random searches of students (G. Russom, personal communication, May 13, 2019; Wong, 2019). Organizers are now assessing the successes and shortcomings of this work as they prepare for another union election, discussing the extent to which the union's leadership has met its ideals of union democracy and how the caucus might be revived to support this work in the future (G. Russom, personal communication, May 13, 2019; field notes, May 12, 2019).

The social justice unionist meetings in 2013 and 2014 also fueled statewide struggles in Massachusetts. While the statewide Educators for a Democratic Union caucus of the Massachusetts Teachers Association (MTA) had been active for several

years, they did not hold leadership positions in the state union and included more educators working in higher education than primary or secondary education. When former high school English teacher and University of Massachusetts–Amherst education faculty member Barbara Madeloni was unjustly fired for supporting her preservice education students' refusal to participate in a pilot of the EdTPA portfolio assessment, however, caucus organizers such as Dan Clawson saw the opportunity to grow the caucus through a campaign to elect Madeloni as an EDU candidate for the presidency of the MTA (B. Madeloni, personal communication, June 7, 2019; Jason, 2014). Madeloni attended the 2013 social justice unionist meeting in Chicago, where Labor Notes organizers such as Ellen David Friedman assessed and supported her candidacy, urging her to run to win (B. Madeloni, personal communication, June 7, 2019).

From there, Madeloni and fellow EDU members organized relentlessly, attending over 70 gatherings across the state. At these gatherings, Madeloni spoke out against the Partnership for Assessment of Readiness for College and Careers (PARCC) high-stakes test that had just been unexpectedly and unethically rolled out in the state, saying they would stop such controversial and dehumanizing practices as the requirement for educators to post data walls in their classrooms (Jason, 2014). On May 10, 2014, Madeloni narrowly won the top position in the union, but the caucus did not hold the majority of seats on the union's executive board, presenting obstacles to realizing their vision for a democratic, social justice union (B. Madeloni, personal communication, June 7, 2019; Jason, 2014). With the support of the EDU caucus, which continued to regularly meet and organize, Madeloni hosted 27 forums across the state, where educators met in groups to discuss three questions: "What is your vision for public education? What keeps

you from achieving that vision? What can you do to fight to achieve that vision?" They also developed an Open Bargaining summit and thirty-six-hour leadership summits where rank-and-file members could "name their experience, identify power, and think about how they could organize collectively at the work site" (B. Madeloni, personal communication, June 7, 2019). Alongside these campaigns to build members' power in the MTA, Madeloni and other EDU organizers gained national attention for their successful campaign against a pro-privatization initiative to lift the cap on charters in the state, which they organized in collaboration with community members through the Massachusetts Education Justice Alliance (Clawson, 2018; B. Madeloni, personal communication, June 7, 2019; Jaffe & Madeloni, 2017). After winning reelection for a second term, Madeloni was succeeded by EDU candidates Merrie Najimy and Max Page in May of 2018 (Clawson, 2018).

In April of 2015, UCORE organizers publicly announced the formation of their network, inviting educators to join the first publicized UCORE conference in Newark, New Jersey, that August (field notes, April 26, 2015). The network would meet at least once per year in subsequent years, with national meetings in Raleigh in 2016 and Los Angeles in 2017. In 2018, organizers in the network decided to plan national UCORE conferences biannually and to meet at the Labor Notes conference in Chicago on off years. With this change in mind, organizers met at the Labor Notes conference in Chicago in April of 2018 and at an official UCORE conference in Philadelphia in July of 2019. UCORE educators have also led a series of smaller regional conferences and meetups at national labor and grassroots conferences. Moreover, caucus organizers hold two monthly virtual meetings using the Zoom app, with one meeting for the network's

steering committee and another for social justice organizers across the country. Through these in-person and virtual gatherings, UCORE organizers share stories from their respective organizing, discussing challenges and insights from their work. As educators in the UCORE network gather together and engage in dialogue, they share cultural practices and policies across the United States, as discussed in Chapter 9.

The development of the UCORE network therefore represents a major step toward realizing the call for teacher organizing within national and international "solidarity networks" (Edwards, 2010) that challenge the "global assault" (Compton & Weiner, 2008) on public education. As such, we can conceptualize the UCORE network as a counter-hegemonic solidarity network directly opposing the neoliberal policy networks detailed by Ball (2014) and Au and Ferrare (2015). Since the network's first unofficial meetings, we have seen dramatic advances in the development of social justice unionism and caucus organizing within the United States. The UCORE network has grown substantially throughout this period, with new caucuses developing in cities and states across the country. Over the course of this period, new statewide networks and social justice caucuses have developed in Arizona, California, New Jersey, New York, Virginia, and West Virginia. Likewise, social justice caucuses have developed representing urban locals in Albuquerque, Baltimore, Boston, Denver, Portland, Racine, and San Francisco. Caucuses have led notable campaigns throughout this period. For example, in 2016, the SEE caucus received national attention for its work leading the first citywide Black Lives Matter at School day of action in solidarity with educators and community organizers at John Muir elementary school, as detailed in Chapter 9 (J. Hagopian, personal communication, May 9, 2019).

One of the most significant of these new caucuses is the Baltimore Movement of Rank-and-File Educators (BMORE), which formed in 2017 through the support of UCORE organizers, including members of Philadelphia's Caucus of Working Educators (WE). The BMORE caucus developed with notable intentionality, discussing how to center the leadership of women of color while advancing a social justice unionist model. Building on insights from experienced caucus organizers in Chicago, Philadelphia, and other contexts, BMORE organizers led a series of successful campaigns before running for elected leadership positions in the Baltimore Teachers Union. These included organizing for the first and second national Black Lives Matter at School weeks, helping to develop the Black Teacher Recruitment and Retention Working Group, and leading an influential campaign to highlight the learning conditions in Baltimore schools (Cohen, 2019; Winslow, 2019). In May of 2019, thanks to their bottom-up, person-to-person organizing in schools across the district, BMORE educators succeeded in winning the top elected positions in the BTU as well as nineteen teacher executive board positions, beating the eight-term incumbent leadership (Cohen, 2019). The unseated leaders challenged this win, with an elections committee appointed by the incumbent citing electoral irregularities caused by their own administration in calling for a new election for only the positions that they had lost (Winslow, 2019). The AFT is currently investigating these claims to determine whether there will be a reelection, and caucus organizers vow to continue doing the work of the union – organizing and advocating for the schools their students deserve – whether or not they are in office (Cohen, 2019; field notes, June 2, 2019).

The growth of the UCORE network has coincided with a period of increased militancy among educators in the United States. In 2018, educators led the largest strike wave in U.S. history since 1986 (Bureau of Labor Statistics, 2019b), with over 379,000 educators participating in job actions in states ranging from Arizona to Washington (Bureau of Labor Statistics, 2019a). In February of 2018, West Virginia educators led a wildcat strike that inspired educators and organizers across the country, winning all five of their demands: a 5% pay raise for West Virginia educators, protecting affordable health insurance for all public employees, maintaining seniority provisions in educators' contracts, stopping the expansion of charter schools, and protecting unions' abilities to deduct dues through payroll (McAlevey, 2018; N. McCormick, personal communication, April 16, 2019; J. O'Neal, personal communication, May 8, 2019). That same month, educators across the country led the first national Black Lives Matter Week of Action, building on organizing by educators in Seattle's Social Equity Educators caucus and Philadelphia's Caucus of Working Educators caucus to lead lessons tied to the thirteen principles of Black Lives Matter (Dillard, 2018). Educators in participating cities continued organizing around these demands throughout the year, with Seattle educators making progress toward meeting such demands as mandated ethnic studies across Seattle schools (T. Gill, personal communication, February 13, 2010; J. Hagopian, personal communication, May 9, 2019).

The historic West Virginia teachers' strike of 2018 inspired similar organizing in a series of other "red state" uprisings that same year (Blanc, 2019b). In April, Oklahoma educators walked out for nine days, winning raises for both educators and support staff as well as new revenue sources for $50 million of additional education funding, although

they did not win the progressive corporate taxes demanded by organizers in the state (Goldstein & Dias, 2018; Yan, 2018). That same week, educators in Kentucky led a sickout that secured a budget that would increase funding for schools throughout the state (Schreiner & Beam, 2018). Later that same month, Arizona educators led a weeklong walkout that galvanized the #RedforEd movement and won both a 20% raise for Arizona educators and additional funds for schools throughout the state (Goldstein, 2018; N. Karvelis, May 15, 2019; R. Garelli, May 5, 2019). Likewise, Colorado educators led a statewide strike that won $150 million in increased funding for education (Associated Press, 2018), and educators in the city of Pueblo led a five-day strike that won a 2% pay increase (Aguilar, 2018). On May 16th, North Carolina educators organized a sick-out that shut down schools in 42 districts as educators rallied at the state capitol to "March for Students and Rally for Respect," which organizers such as Bryan Proffitt of the Organize 2020 caucus and Durham Association of Education called a victory over "hopelessness" and "fear" even if they have not yet won their demands of increased school funding (Hui, Childress, & Morrill, 2018), Later that year, Washington educators led a series of job actions, including a weeklong strike by Tacoma educators that won a 14.4 percent pay raise (Schnell, 2018).

The following year, educators across the country continued to organize both citywide and statewide actions for educational, labor, and social justice. In January of 2019, Los Angeles educators led a successful strike for such common good demands as smaller class sizes, green space on campuses, a shift toward community schools, lower nurse and counselor ratios, less instruction time lost to standardized tests, and an end to random searches (Wong, 2019). Organizers in United Teachers-Los Angeles's Union

Power caucus had been building toward this strike for over four years, and they won in part because of the strong community-labor coalitions they had built through such campaigns as the Schools LA Students Deserve and Reclaim Our Schools LA (A. Inouye, personal communication, August 7, 2015; G. Russom, personal communication, May 13, 2019; Jaffe, 2019a; Henwood, 2019). Moreover, this strike realized the vision that progressive educators in the Second Opinion, PEAC, and Union Power caucuses had worked toward for over two decades.

In February of 2019, educators across the country again led a Black Lives Matter Week of Action, building on the demands, lessons, and successes of the previous year (Dillard, 2018; J. Hagopian, personal communication, May 9, 2019). That same month, West Virginia educators led a second historic strike in two years, this time successfully organizing against a bill that would have raised educator salaries while allowing privatization through charters, vouchers, and online schools (Schwartz, 2019). This strike was a success in part due to the organizing of educators in the newly formed West Virginia United caucus, which had developed in the summer of 2018 with the support of organizers in UCORE and Labor Notes. Educators in the West Virginia United caucus had led the 2018 strike and were now leading political education efforts around the threat of privatization (N. McCormick, personal communication, April 16, 2019; J. O'Neal, personal communication, May 8, 2019). Later that month, Oakland educators, including several organizers from the Classroom Struggle caucus who had won leadership positions through the Build Our Power slate, led a successful weeklong strike: winning pay raises for educators and nurses, decreased caseloads for counselors, psychologists, and special

education teachers, reduced class sizes, a decrease in the number of closures, and a five-month moratorium on new charters (Blanc, 2019a; Campbell, 2019).

Later that spring, educators in both "red" and "blue" states organized days of action advocating for education funding and other common good demands. On May 1st, 2019, educators in North and South Carolina led a one-day walkout with a range of demands. In North Carolina, educators affiliated with the Organize 2020 caucus demanded reduced ratios of support staff, restoration of retiree health benefits and advanced degree compensation for educators, and the expansion of Medicaid for communities across the state. In South Carolina, educators organized in solidarity with their colleagues to the north, demanding reduced mental health counselor ratios, pay raises for educators, and job protections for educators (Yan, 2019). On May 8th, Oregon educators led their own day of action for school funding, winning a progressive corporate tax that would fund over a billion dollars per year for secondary and early childhood education (Borrud, 2019). This victory would be immediately followed by a cut to educators' pensions in the Public Employees Retirement System (PERS) (Mapes, 2019). Later that month, California Educators Rising led a statewide day of action on May 22nd, demanding fully funded schools (Kujichagulia-Seitu, 2019).

These days of action were organized by a range of grassroots networks, caucuses, and state teachers' unions. The Oregon day of action was officially organized by the Oregon Education Association, for example, with grassroots organizers in the Oregon Public Employees United network advancing more concrete and ambitious demands from the ground up. The California day of action was organized by the grassroots Educators Rising network, building on relationships that developed through solidarity work in the

Oakland educators' strike. The North Carolina day of action was organized by the statewide North Carolina Association of Educators (NCAE) union, building on the work of organizers in the Organize 2020 caucus, which helped to organize and develop demands for each of these actions. The South Carolina day of action was organized by a developing SCforEd grassroots network. In many cases, these days of action built on both this history of struggles in their own contexts as well as the lessons from struggles in other contexts, such as the Arizona and West Virginia educators' strikes of 2018. Nevertheless, they can also be understood as examples of the "day of action" model popular in many NEA locals, which often lack the militancy and efficacy of multiday strikes led by the rank and file.

At the start of the 2019-2020 school year, educators in Chicago's CORE caucus proved themselves to still be at the forefront of social justice unionism in the United States, leading a groundbreaking 11-day strike that began on October 17th. Through their leadership in the Chicago Teachers Union, CORE organizers led a strike that won such demands as nurses and counselors in every school, smaller class sizes, restorative justice practices in schools, sanctuary policies for undocumented students, and resources for homeless students (Jaffe, 2019b). In doing so, they again demonstrated the potential to use bottom-up organizing, community coalitions, well-researched campaigns, and escalating actions to advance justice in their schools and communities.

We can see the extraordinary educator organizing of the past two years as a continuation of contemporary educator movements that have been building for decades, in part through the support of UCORE and related networks. Educators leading many of the most significant actions of the past two years – including the 2018 Arizona

Educators' strike, the 2018 and 2019 West Virginia educators' strike, the 2019 Los Angeles educators' strike, the 2019 Oakland educators' strike, and the 2019 Chicago educators' strike – are active members of the UCORE network. Moreover, in addition to developing strategies that would be adapted by organizes in other states, educators in each of these actions have organically used and adapted cultural practices that had been shared by educators in long-standing social justice caucuses, particularly the CORE caucus in Chicago.

Throughout the contemporary educator movements of the past few years, educators have supported and learned from each other's struggles through UCORE and other networks. This includes the struggles led by statewide networks in Arizona, West Virginia, and other contexts. Indeed, while West Virginia educators took most educators in the UCORE network by surprise when they organized their 55-county strike in 2018, key organizers in these strikes, including Rebecca Garelli of Arizona Educators United and Jay O'Neal of West Virginia Public Employees United, were directly inspired by the organizing of UCORE educators, most notably the 2012 Chicago teachers' strike. Both organizers had read Labor Notes' *How to Jump Start Your Union,* which details the 2012 strike, and adapted strategies from that organizing into their own struggle (R. Garelli, personal communication, May 5, 2019; J. O'Neal, personal communication, May 8, 2019). Likewise, Garelli and her fellow Arizona organizer Noah Karvelis had strong memories of the Chicago strike, with Garelli having participated as a teacher in Chicago and Karvelis having followed it closely as a student nearby in Illinois.

Several leaders in these strikes were connected to UCORE educators through grassroots, leftist, and labor organizations. Moreover, key organizers in these statewide

actions worked with UCORE educators to maintain their momentum and build a more sustainable organizing structure, with West Virginia educators forming the West Virginia United caucus to support this work. Furthermore, in 2019, long-standing UCORE members led the historic educators' strikes in Los Angeles, Oakland, and Chicago, and members of the new West Virginia United caucus organized rank-and-file educators for the state's second recent strike.

Through the remarkable collective actions detailed in this chapter, educators advanced democracy and justice in their local contexts using a series of cultural practices that are characteristic of social justice caucuses and the UCORE network as a whole, enacting the purpose and principles of social justice caucus organizing. In my militant ethnographic research as a member of the UCORE network from 2015-2019, I have found that organizers in social justice caucuses often pursue a shared purpose of building power to democratically advance justice in their schools, unions, and broader communities from the ground up. As I discuss in Chapter 6, there are variations in the extent to which caucuses emphasize one dimension of this purpose or another, depending upon such factors as caucus members' individual backgrounds and ideologies, the political context of their organizing, their relationship to their local union, and their phase(s) of caucus development. Nevertheless, caucuses generally pursue this shared purpose, often doing so using mission statements or points of unity that center such ethical principles as care, democracy, justice, and solidarity. As discussed in Chapter 7, organizers use these principles to frame, guide, and evaluate their work, in many cases navigating tensions between such principles as democracy and racial justice.

Despite these tensions and variations, I have found that most caucuses build power to transform their unions, schools, and broader communities by using the following ten cultural practices: 1) connecting with other educators; 2) gathering together; 3) sharing stories and resources; 4) engaging in dialogue; 5) identifying issues; 6) developing norms; 7) forging a collective identity; 8) leading campaigns; 9) linking struggles; and 10) reflecting on organizing. As I discuss in Chapter 9 of this dissertation, these practices developed from the ground up through ongoing struggles in educators' local contexts, and they are iterative rather than linear or discrete. Moreover, as I discuss in Chapter 10, many of these same cultural practices facilitate the spread of social justice unionist practices across UCORE and other networks, fostering learning across struggles and fueling the spread of contemporary educator movements.

As the history outlined in this chapter illustrates, contemporary educator movements have already substantial gains for students, teachers, and communities in the United States, in many cases using the cultural practices I discuss in this dissertation. Through their organizing, educators in social justice caucuses have won such concrete gains as ethnic studies curricula, increased school funding, lower class sizes, mandated recess time, more equitable educator salaries, racial equity teams, and stopping random searches in schools. They have also successfully pushed back against the spread of austerity and privatization policies in public schools, with wins ranging from moratoriums on charter schools to preventing educator and school evaluations from being linked to test scores. Through these struggles, they have contributed to the long tradition of educator organizing within and alongside social movements, ranging from the democratic, feminist organizing of Margaret Haley to the militant rank-and-file and

community organizing of Teachers Union to the equity-oriented, common good organizing of Black educators' associations in the pre-*Brown* South.

As was the case in these earlier struggles, social justice caucus organizers often find they must continue organizing to maintain their gains in the face of new attacks on public education. Nevertheless, even in cases when they do not win their demands, they are still able to transform their unions, schools, and communities in less tangible ways. Through their work, they show what is possible, shifting the consciousness of other educators and the public at large. They also build their collective power, developing a wider network of support among educators, parents, and students.

CHAPTER 3: Conceptualizing Social Justice Caucuses and the UCORE Network

> *I think that social justice caucuses are the key to transforming our unions from a business union model to a social movement union model. And we've seen that in Chicago where CORE built up its membership and its strategy and was able to help transform the union to fight against corporate reform. We've seen that in L.A., with the Union Power caucus. We've seen this in Philadelphia, with the caucus that helped to launch Black Lives Matter at School Week, the Caucus of Working Educators.* (J. Hagopian, personal communication, May 9, 2019)

> *I would say that my experience previously in UCORE has been always not feeling so isolated in your work, right. Not feeling isolated and also learning from people that have gone through stuff before, but also being a beacon of light for those who are just starting out.* (T. Anderson, personal communication, June 3, 2019)

As social justice caucuses have developed to organize against the neoliberal and racist assault on public education over the course of the past decade, they have brought together educators with a wide range of identities and positionalities, including activist educators committed to transforming their schools, unionist educators dedicated to transforming their unions, and experienced leftist organizers devoted to transforming society as a whole. Together, these educators have developed caucuses that pursue a similarly expansive range of goals, and through the wider UCORE network they have been able to share strategies from their respective contexts and build power nationwide. Of course, as detailed in the previous chapter, many caucus educators have overlapping political commitments and goals, but it is nevertheless remarkable that social justice caucuses bring together three significant progressive traditions: social justice pedagogy, rank-and-file labor organizing, and leftist social movements. In bridging these traditions and developing a national network to support caucus organizing across the United States,

social justice caucuses have made major political gains, incrementally and sometimes quite dramatically transforming unions, schools, and communities.

By offering a conceptual framework for understanding social justice caucuses and the UCORE network in this chapter, I hope to draw on each of these traditions. In my consideration of the ways that social justice caucuses to promote progressive and social justice pedagogies, I draw on the educational studies literature. In my exploration of the ways that social justice caucuses work to transform their unions, both promoting and practicing democratic, social justice unionism, I draw on the labor studies literature. In my discussion of ways that social justice caucuses organize alongside social movements and develop contemporary educator movements, I draw on the social movement literature. Moreover, in my delineation of the ways that the UCORE network supports the spread of social justice unionist practices across the United States and fuels contemporary educator movements, I draw on the social movement literature as well as the critical policy studies literature.

In this chapter, I will first discuss how these literatures can inform our understanding of social justice caucus organizing. I will then discuss their relevance to our understanding of the UCORE network as a whole. In subsequent chapters, I will return to key texts in these literatures to ground the major findings of this dissertation, including my findings on the purpose of social justice caucus organizing, the ways that caucus organizers use ethical principles in their work, the key cultural practices of caucus organizers, and how these very same practices further the development of social justice caucuses in new contexts, fueling the growth of contemporary educator movements across the United States.

Conceptualizing Social Justice Caucuses

As I argue in Chapter 5, social justice caucuses can be understood as groups of educators working to build the power necessary to transform their unions, schools, and society for democracy and justice. Caucuses have developed in cities and states across the country since the 1990s, doing the work of their unions by organizing against the neoliberal assault on public education that has exacerbated existing racial and economic inequalities in the United States. Several caucuses formed in the wake of major victories such as Chicago teachers' strike of 2012, which was organized by the leaders of the best-known social justice caucus, the Caucus of Rank-and-File Educators.

Social justice caucuses have important antecedents in the history of education labor organizing, as I explore in the previous chapter. These include the democratic and feminist organizing against corruption of Chicago's Margaret Haley in the early 1920s; the common good, racial uplift organizing of Black teachers' associations in the pre-*Brown* South; the anti-racist community organizing of New York's Teachers Union in the midcentury; the militant rank-and-file organizing of the "long seventies"; and the vision for social justice unionism outlined by leaders in the National Coalition of Education Activists in the 1990s. Social justice caucuses integrate principles and practices associated with each of these traditions, as discussed in later chapters.

With this history in mind, social justice caucuses could be conceptualized in a number of ways. Building on the educational studies literature, they could be understood as education activist organizations working to transform schools and society. Building on the labor studies literature, they could be understood as social justice labor organizations working to transform teachers' unions and, in turn, transform schools and society. Or, building on the social movement literature, they could be understood as social movement organizations leading contemporary educator movements to collectively transform schools, unions, and society. In my discussion of the literatures that inform this study, I will discuss how each of these conceptualizations can enrich our understanding of educator organizing in social justice caucuses. I also focus on empirical research in these literatures to frame my discussion of *how* educators transform their schools through grassroots and labor organizing in a network of social movement organizations.

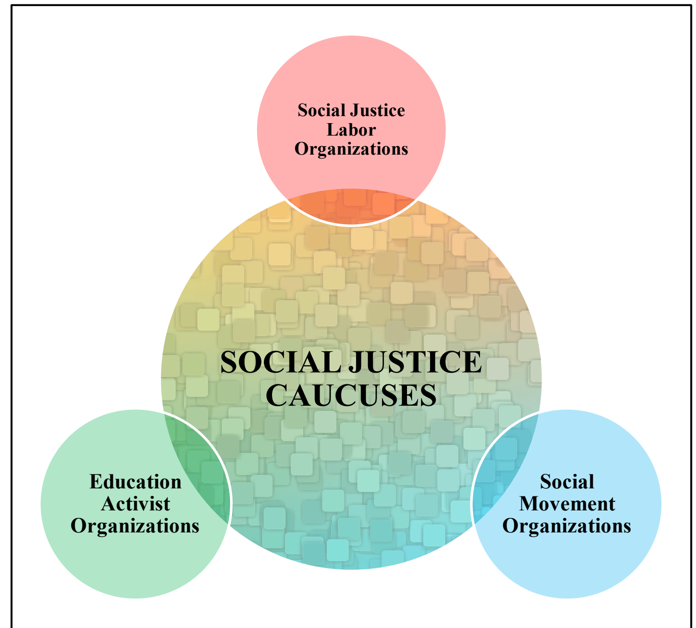

Figure 1.

Conceptual Framework for Understanding Social Justice Caucuses.

Education activist organizations transforming schools and society.

The National Coalition of Education Activists (NCEA) was one of many grassroots organizations or networks that have provided opportunities for educator activists to come together, share stories and resources, and discuss how to implement

more equitable pedagogies and policies in their local contexts. These counter-hegemonic organizations and networks have explicitly organized to combat the neoliberal reforms that accelerated in the wake of national policy documents and policies such as *A Nation at Risk* (United States, 1983), *No Child Left Behind* (NCLB, 2002), and *Race to the Top* (U.S. Department of Education, 2009). In the first two decades of the twenty-first century, grassroots organizations developed in cities across the country to bring together educators who challenge neoliberal reforms and advocate for equitable pedagogies and policies, including New York Collective of Radical Educators, Northwest Teachers for Social Justice, Teachers for Social Justice, and Teachers 4 Social Justice. Likewise, a number of national grassroots conferences, organizations, and networks formed to bring together educators pursuing these aims, including Free Minds, Free People, the Education for Liberation Network, the Badass Teachers, and United Opt Out (Spreen & Stark, 2014).

Educators in social justice caucuses in the UCORE network have frequently participated in these networks, in some cases leading panels on caucus organizing. Moreover, social justice caucuses share much in common with these grassroots organizations and collectives. They offer spaces for activist educators to build relationships and share stories, strategies, and resources. Likewise, while most caucuses do not primarily focus on curricular transformation, caucuses in the UCORE network promote progressive and anti-racist pedagogies and oppose market-based education reform.

As I will argue later in this conceptual framework, other dimensions distinguish social justice caucuses from grassroots educator activist organizations, including their

focus on rank-and-file organizing and use of social movement strategies to transform educators' unions and society. Nevertheless, it is helpful to understand social justice caucuses in part as organizations that bring together radical educators intent on changing schools and society. With this in mind, I will briefly review the literatures on whether and how educators can change schools and society.

Can education activists change schools and society?

While leading sociologists have established the complex ways that educators reproduce (Bourdieu & Passeron, 1977; Lareau, 2003; Oakes, 1986) existing social inequalities, others have explored and demonstrated the potential for educators to challenge (Apple, 2013; Oakes, Rogers, & Lipton, 2006) these inequalities and work toward more equitable schools and communities. Within the fields of educational studies and the sociology of education, there is a long-standing tradition of discussing how educators might change society. Indeed, this tradition has informed several key texts in these fields, including George Counts' *Dare the School Build a Social Order?* (1932), Michael Apple's *Can Education Change Society?* (2013), and Marshall and Anderson's *Activist Educators* (2008). Building on this tradition, I will briefly review recent literature on how educators have engaged in social change.

A major consideration within this tradition is how teachers can advance ethical principles such as democracy and justice in order to create more equitable schools and communities. In his foundational work, *Pedagogy of the Oppressed* (1970), and subsequent texts, Freire offers the influential model of critical pedagogy as a praxis for transforming schools and disrupting hegemonic social and educational inequalities. Within this model, educators engage in a "problem-posing" rather than "banking"

approach to education, using dialogue to develop critical consciousness and encourage transformative action. Wallerstein (1983) identifies "listening," "dialogue," and "action" as three key practices within Freirean problem-posing education. In *Teaching to Transgress*, hooks (1994) likewise offers a theoretical framework for understanding liberatory teaching as a form of resistance or "transgression." In their canonic text for new teachers, Oakes and Lipton (1999) also outline social theories and strategies relevant for "teaching to change the world." Stitzlein (2012) similarly details the ways that teachers could prepare students to themselves engage politically through "dissent." Throughout this tradition, scholars have considered both how educators can advance equity and how they can respond to inequitable policies, including the Global Education Reform Movement or GERM and the privatization of public education (Ball & Youdell, 2009; Compton & Weiner, 2008).

How can educator activists change schools and society?

While these authors offer compelling theoretical frameworks for understanding the relationship between teachers' work and social change, there is a growing body of empirical research investigating how educators organize for democracy and equity. In *Teachers and Texts,* Apple (1988) discusses several "periods of exceptional militancy and clear political commitment" among educators across U.S. history (p. 48). He further discusses the role that women educators played in struggles around socialism and feminism in the twentieth century (pp. 75-56). Walker (2005, 2013, 2018) also offers powerful historical examples of educators advancing educational and social equity, including the work of Black educators' associations in the pre-*Brown* South and the organizing of covert networks to desegregate schools. Marshall and Anderson (2008)

likewise offer a qualitative analysis of both the historic context and sociocultural processes of teacher activism for social justice issues in schools, drawing on interviews with 52 educators and administrators engaged in teaching or organizing for social justice. Similarly, in their case studies of activist research collaboratives that bring together students, parents, and educators, Oakes, Rogers, and Lipton (2006) illuminate how diverse communities can build power and use this power to defend and transform schools.

In their case studies of neoliberal education reform in Chicago and New Orleans, Lipman (2011) and Buras (2014) discuss the role of teachers in responding to school closures that disproportionately affect poor and minoritized communities. Santoro (2011) further explores the role of ethical principles in teachers' decisions to publicly leave the teaching profession, offering a theory of educators as "principled leavers." In *Can Education Change Society,* Apple (2013) offers case studies of educators who have advanced equity through their engagement in "decentered unities," which he defines as "spaces that are crucial for educational and larger social transformations that enable progressive movements to find common ground and where joint struggles can be engaged in that do not subsume each group under the leadership of only one understanding of how exploitation and domination operate in daily life" (p. 13). In her ethnographic case study of the Brazilian Landless Workers' Movement (Movimento dos Trabalhadores Rurais Sem Terra - MST), Tarlau (2015) demonstrates the potential for educators to engage in a praxis of critical pedagogy that successfully transforms both the institution of public education and broader social structures.

Labor organizations transforming teachers' unions.

By coming together to share strategies for advancing equity in their schools and broader society, social justice caucus educators have contributed to the tradition of educator activism outlined in the previous review. Nevertheless, social justice caucuses are distinct from other grassroots education organizations and networks in three key ways. To begin with, they are distinct in their focus on using rank-and-file labor organizing to advance social change, bringing together "social justice educators and unionists," as emphasized in the 2014 UCORE mission statement. Furthermore, social justice caucuses are distinct in their practice of direct and participatory democracy to advance this change, with educators engaging in the network as representatives of caucuses and grassroots labor networks across the country, as well as emphasizing union and school democracy throughout their organizing. Moreover, social justice caucus educators engage in a distinct form of unionism, which I discuss as social justice unionism. With these distinctions in mind, I will briefly review the literature on the relationship between educator unionists and social change, particularly as it relates to new models of unionism.

Can educator unionists change schools and society?

In both historical and sociological studies of teachers' unions, labor researchers have traced major movements within the history of teachers' unions and debated how unions can best respond to contemporary challenges such as privatization and neoliberal reform. In discussions of the history of teachers' unions, researchers have largely emphasized the political nature of teachers' unions, arguing alternatively that unions support or hinder educational achievement or equity. Historians such as Kahlenberg

(2006) demonstrate the political nature of teachers' unions' work throughout U.S. history, beginning with their early advocacy for equal pay in the nineteenth and early twentieth centuries and continuing into their focus on professionalism in the "new unionism" of the 1990s. Urban (1982) argues that teachers' unions were formed primarily to advance the economic and political interests of teachers. These interests have been critiqued by some researchers, who argue that teachers' unions have "economic and political priorities" that might interfere with curricular reform (Moe, 2006, p. 3). Yet, Murphy (1990) and Urban (2000) review the ways that the two major unions in the United States have transformed over the course of the twentieth century, in some cases supporting educational reform efforts and gender, economic, and racial justice.

In the past two decades, a number of scholars have explored the potential for teachers' unions to work for social justice, contributing to the literature on social justice unionism (SJU) and social movement unionism (SMU). As discussed in Chapter 2, education organizers began calling for social justice unionism (SJU) as a new model of unionism in the early 1990s. The National Coalition of Education Activists outlined a vision for social justice unionism in 1994 (NCEA, 1994), and a small number of education organizers put this vision into practice in their unions in the 1990s, either through leadership positions or through the first dissident social justice caucuses. As Rottmann (2008) argues, Canadian teachers' unions began implementing this model throughout the next two decades, with notable and long-standing social justice unionist programs in such unions as the British Columbia Teacher Federation (BCTF) (Rottmann, 2012). Drawing on her empirical research as well as practitioners' conceptual frameworks, Rottmann (2013) identifies four organizational qualities as central to social

justice unionism: “procedural democracy,” “demographic diversity,” “community connections,” and “anti-oppressive action” (p. 73).

Within the same period of time, labor scholars began calling for a similar model, which they termed social movement unionism (SMU). While some scholars make sharp distinctions between the models of social justice unionism and social movement unionism, I have found that the early definitions of social justice unionism put forward by the NCEA (1994), Peterson, and others remain relevant to the radical teacher organizing of the twenty-first century. Moreover, I have found that there exist few significant differences between how the models of social justice and social movement unionism are conceptualized by scholars and practitioners. With this in mind, I use the framing of social justice unionism in my scholarship because this is the framing most often employed by educators engaged in this work, as previously discussed.

In scholarly debates around these models, SMU is alternately framed as a form of unionism wherein educators are connected to broader social movements, organizing alongside them and learning from them, or a model grounded in union-community collaborations (Moody, 1997; Waterman, 2008). For Waterman (2008) this model involves “unions and socialists not simply allying with but learning from the practice and theory of the feminists, the indigenous, the human rights, ecological and other such movements” (p. 303). Turner and Hurd (2001) note that this unionism is characterized by an “aim to revitalize the labor movement through active organizing, political action, and the rebuilding of a strong social movement dimension, a capacity for rank-and-file mobilization and ongoing involvement” (p. 11). Building on this tradition, Weiner (2012) discusses how this model would shape teachers’ unions, noting that within social

movement unions, “[u]nion power comes from the bottom up” and the union strives toward “creating a more democratic, equitable society” by working with “movements that are working for social justice, peace, and equality” (p. 36). Weiner (2012) likewise argues that teachers’ unions should build on the power of their base by advocating for social justice-oriented education reforms through grassroots, rank-and-file organizing in social movements. In doing so, she argues that a SMU model more fully centers union democracy than do SJU models proposed by educator organizers. In later work on social movement unionism, Weiner (2014) argues that social movement unionists should focus on a “trifecta” of social justice, mobilization, and democracy in their organizing.

In their discussions of alternative models of educator unionism, education labor scholars have argued that new models such as social movement unionism would allow educators to successfully organize against neoliberalism on a local, national, and international scale. Dean (2013) argues that teachers’ unions must transition from taking defensive positions against neoliberal reforms to offensive positions in favor of social justice-oriented reforms. Compton and Weiner (2008), Edwards (2010), and Spreen and Stark (2014) argue that teachers’ unions should build networks of solidarity to combat the neoliberal assault on public education.

How can educator unionists change unions, schools, and society?

Within this literature, scholars offer strong theoretical frameworks for understanding the potential of social movement unionism (Moody, 1997; Waterman, 2008; Weiner, 2012) and social justice unionism (NCEA, 1994; Rottmann, 2008; Rottmann, 2012; Rottmann, 2013). Few of these studies explore the role that caucuses might play in this transformation, however, and many rely on conceptual arguments more

than empirical research. A growing number of scholars are turning their attention to using empirical research to demonstrate how educator unionists have effected change in schools and society. This developing literature includes researchers considering the impact of educators' unions on both the working conditions of educators and the learning conditions of students. It also includes qualitative studies of social justice unions and, increasingly, social justice caucuses.

In these studies, some scholars have used empirical research to explore how teachers' unions engage in macropolitical systems, developing more equitable contracts and engaging in policy debates. Strunk and Grissom (2010), for example, demonstrate that districts with stronger unions – as demonstrated by their support of elected school board members – often allow for less administrative flexibility in the negotiation of Collective Bargaining Agreements or CBAs. Other researchers have focused on the strategies that unions use to support their work. McDonnell and Pascall (1988), for example, argue that unions can use one of three major approaches to education reform: challenging policies, adapting to them, or developing alternatives to them. Cohen and Strunk (2014) further identify that collective bargaining and organizing serve as the two primary methods unions draw on to engage in education policy. Bascia (2009) likewise explores the role of teachers' unions in responding to and shaping education policy change, paying particular attention to the role of educators' unions in advancing curricular reforms (see also Bascia & Osmond, 2012).

In recent years, scholars have turned their attention to the history and practices of caucuses and unions engaged in new forms of teachers' unionism, generally referred to as either social justice unionism or social movement unionism. Rottmann (2008) analyzes

the web sites of twenty educators’ associations representing all Canadian provinces and territories, for example, and finds that “Canadian teachers’ federations function as sites of social justice activism, but are not yet as a whole social justice organizations” (p. 984). Rottmann (2013) likewise offers a case study of a Canadian teacher union’s work to support positive educational change, focusing her attention on the work of educator unionists in the British Columbia Federation of Teachers (BCTF) (see also Rottmann et al., 2015). Several scholars have traced the organizing of the Caucus of Rank-and-File Educators (CORE) from their struggles against school closures to their leadership of the Chicago Teachers Union strike of 2012 (McAlevey, 2016; Bradbury et al., 2014). Alter (2013), Green (2013), and Uetricht (2014) likewise offer useful discussions of social justice unionism in action through their case studies and histories of this strike.

Weiner (2014) discusses the growth of social justice caucuses in the wake of the Chicago teachers’ strike as part of her discussion of the need for a focus on union democracy. Likewise, Riley (2015) discusses the Caucus of Working Educators (WE) summer reading groups as model for social justice organizing. Maton also offers a case study of teacher organizing within the WE caucus as an example of social justice unionism (Maton, 2016b), as well as exploring how caucus organizers shifted their analysis from identifying neoliberalism as the cause of inequalities in Philadelphia to identifying structural racism as the cause (Maton, 2016a; Maton, 2018). Brown and Stern likewise offer several studies on the WE caucus, discussing restorative love (Stern & Brown, 2016) and gender dynamics in the caucus (Brown & Stern, 2018).

Brogan (2016) likewise compares the organizing of Chicago’s CORE caucus and New York’s MORE caucus in relation to their political contexts. Similarly, Bocking

(2017) considers how education organizers have responded to challenges to their professional autonomy in Canada, Mexico, and the U.S. and Mexico, discussing the work of the MORE caucus in particular. Johnson (2017) likewise offers a case study of organizing in the Organize 2020 caucus in North Carolina as an example of social movement unionism, contributing to conversations around counter-networks to neoliberal policy networks. Schirmer (2019) offers a case study of progressive organizing among Milwaukee Teachers' Education Association (MTEA) educators, detailing how they fought for years for racial and economic justice policies and organized against Scott Walker's 2011 Act 10 legislation in Wisconsin. Likewise, Stark and Maton (2019) discuss political education in social justice caucuses in the wake of school closures in Chicago and Philadelphia. These studies serve as some of the only empirical studies available on the role of social justice caucuses and social justice unions.

The UCORE network brings together educators leading many of the caucuses outlined in this literature, including the Caucus of Rank-and-File Educators (CORE), the Caucus of Working Educators (WE), and the Movement of Rank-and-File Educators (MORE). In doing so, it represents a major step in the history of teachers' unions in the United States, as well as a significant network for advocating for and engaging in a new form of teachers' unionism. Despite its significance, this network has not been widely discussed in the labor studies literature. By documenting the work of the UCORE network and offering empirical research on social justice caucuses that draws on organizing across the United States, this dissertation therefore offers a notable contribution to the literature on social justice unionism.

Social movement organizations transforming schools and society.

With the previous review in mind, it is sensible to conceptualize social justice caucuses primarily within the labor studies literature. Nevertheless, they could also be considered social movement organizations, given the role of social justice caucuses in advancing contemporary educator movements such as the #RedforEd movement, as well as broader struggles for social justice in unions, schools, and society. It is therefore helpful to consider the insights that social movement scholarship might offer on how we understand organizing in social justice caucuses.

Before reviewing this literature, I will argue that social justice caucus organizing in the United States could be considered a social movement in its own right. Some scholars would argue that social movement unionism must be understood as distinct from social movements, and that organizing in social justice caucuses would therefore be considered an example of the former but not the latter. Turner and Hurd (2001), for example, offer this distinction: "Social movement unionism is not the same thing as a social movement, to be sure. The former is a type of unionism that mobilizes the rank and file for specific actions and gains; the latter is a broad, often uncontrollable social phenomenon that comes along at particular periods of history" (Turner & Hurd, 2001, p. 24). This is not the position of all labor studies or social movement scholars, however.

A growing number of labor and social movement scholars have considered the ways that more militant, rank-and-file labor organizing might itself be considered a social movement. In *The Future of our Schools,* Weiner (2012) argues that "a social movement union not only endorses social justice outside the school, it also exists as a social movement itself" (pp. 36-37). Similarly, in a case study of teacher organizing in New

York City, Weiner (2013) offers this organizing as an example of "how teachers might develop new spaces and organizational forms not confined by collective bargaining jurisdictions and traditional bargaining demands, spaces to support development of a social movement of teachers that would, in turn, edge teachers' unions in the direction of social movement teacher unionism" (p. 266). While Weiner argues that educators' organizing has the potential to develop into a social movement in this text, other scholars have suggested that this potential educator social movement is in fact already under way. Mann (2014), for example, argues that a new social movement of rank-and-file workers can be identified as early as the 2011 Wisconsin uprising, with the 2012 Chicago Teachers' strike as an example of this movement. In advancing this argument, Mann asserts that this movement meets Tilly and Wood's (2009) requirement that social movements be "sustained" in nature. Likewise, Stern, Brown, and Hussain (2016) argue that a movement they term the New Teacher Movement began with the Chicago teachers' strike, building on the framings of editors in *Rethinking Schools* (2012-2013). Brown and Stern (2018) similarly discuss the feminist dimensions of "new teacher movement(s)" in their discussion. Building on their arguments, I use the phrase "contemporary educator movements" to conceptualize the organizing of UCORE educators since at least 2008 – when CORE was founded – and arguably since the 1990s. In referring to them as "contemporary educator movements" instead of "new teacher movements," I am recognizing the importance of non-certificated or classroom educators in this work as well as differentiating these movements from some social movement scholars' arguments that "new social movements" formed in the 1960s (e.g. Scott, 1990).

With this in mind, I will draw on the social movement literature to argue that recent examples of militant teacher organizing might be considered examples of contemporary educator movements alongside a new form of unionism. To briefly solidify this argument, it is worth reviewing the ways that this organizing meets the criteria within major definitions of social movements. Snow (2014) synthesizes major definitions of social movements to offer the following criteria for identifying a particular example of collective organizing as a social movement: that it be "change-oriented"; that it either challenge or defend "existing institutional structures or systems of authority"; that it be "collective rather than individual"; that it engage - at least in part - "outside of existing institutional or organizational arrangements"; that it be organized, whether through a "single social movement organization (SMO)" or a "network or coalition of movement organizations"; and that it "display some degree of temporal continuity."

Social justice caucus educators in the UCORE network have engaged in social movements that meet all of these criteria. These movements have been decidedly change-oriented, with educators developing demands that range from common good labor bargaining to restorative justice in schools to progressive tax structures. Moreover, these movements have been expressly intent on both challenging and defending existing institutions: defending workers from right-to-work legislation while pushing unions to be more democratic; defending public schools from privatization while pushing for more equitable policies. These movements have also been decidedly collective, with educators working together to develop and implement such campaigns as challenging school closures, boycotting standardized tests, and protesting the detention and deportation of students and community members.

While some educators have worked within existing structures to organize for change, running for elected union positions, passing New Business Items, or lobbying their local school board, these movements have in many cases been focused outside of existing institutional structures. Indeed, many social justice caucus educators argue that their role is to do the work of the union themselves: organizing members and developing campaigns that advance equity in their schools and broader community. In addition, it is clear that social justice caucus educators' work is carefully organized.

With these considerations in mind, in my analysis of organizing structures in the UCORE network, I consider social justice caucuses to be distinct from other forms of caucuses in labor organizing (e.g. reform caucuses, affinity group caucuses), interpreting them instead as social movement organizations, which McCarthy and Zald (1973) define as "complex, or formal organization which identifies its preferences with a social movement or a counter-movement and attempts to implement those goals" (p. 1218). From a social movement studies lens, we could therefore conceptualize UCORE as a counter-hegemonic network of social movement organizations (SMOs) leading contemporary educator movements. I build on this conceptualization later in this chapter, in my discussion of the UCORE network itself.

The movements social justice caucus educators have led are also "temporally continuous" (Snow, 2014) or "sustained" (Tilly and Wood, 2009). As I reviewed in Chapter 2, caucus educators have been organizing for more equitable schools, unions, and communities both locally and nationally using a social justice unionism model since at least the 1990s. Through this organizing, they formed a number of social justice caucuses in the late 2000s and early 2010s, and the UCORE network itself beginning to

form in the wake of the 2012 Chicago educators' strike. As Anyon (2005, 2009) discusses, the first two decades of educator organizing can be understood as what Ella Baker called the "spadework" necessary to prepare for the educators' social movements led by social justice caucuses and networks in the twenty-first century.

This organizing has developed in the last decade through the creation of social justice caucuses such as Chicago's CORE, which I conceive of as SMOs, as well as counter-hegemonic social movement networks such as UCORE. Through the networked organizing of activists in these movements, educators have shared strategies with each other and organized such notable collective actions as the Chicago teachers' strike of 2012, the MAP boycott of 2013, the Seattle teachers' strike of 2016, the first national Black Lives Matter at school week of 2018, and the Los Angeles teachers' strike of 2019. Moreover, while I argue that these movements have been continuous in their growth, the strike wave that began in West Virginia in 2018 marks an important turning point in the growth of these movements, which leaders sometimes describe as a "renewed movement" (J. O'Neal, personal communication, May 8, 2019).

In my analysis of social justice caucuses in the UCORE network, I therefore draw on the social movement literature to analyze educator organizing within this network and the movements it supports. Moreover, I frame this organizing as contemporary educator movements in recognition of its connections to recent scholarship on social movements. In pluralizing "movement," I am recognizing the extent to which educator organizing within the United States might be considered "movements of movements," drawing on Sen's (2017) conceptualization, which in turn draws on Klein (in Chihara, 2002). Moreover, in referring to this organizing as contemporary – as

opposed to "new" – movements, I am distinguishing it from the wave of "new social movements" since the 1960s. I am likewise confirming the existence of what Wolfson, Treré, Gerbaudo, and Funke (2017) term a "contemporary logic of resistance" in social justice caucus organizing that aims "to bridge Old and New Left concerns of anti-capitalism and identity politics" (p. 397). This logic includes "diversity, use of social media, pre-figurative politics, grassroots democracy, [and] distrust of established institutions" (p. 395). As discussed further in Chapters 8 and 9, we can identify this "logic of resistance" throughout the contemporary educator movements led by social justice caucus organizers in the UCORE network.

Can educator organizers change schools and society?

Social movement scholarship offers influential frameworks for understanding contemporary educator movements led by social justice caucus organizers in the UCORE network. In the twentieth century, much of this literature focused on offering theories for explaining – and predicting – the success of social movements. Blumer (1951), for example, offered a theory about the four-stage development and decline of social movement, which Mauss (1975) developed further into a five-stage theory. Likewise, in their much-cited study of social movement organizations, Zald and Ash (1966) argued against the classical social movement theory that movement organizations become more conservative over time, arguing instead that their development is tied to trends within society as a whole as well as other groups. In other canonical texts within the social movement literature, McCarthy and Zald (1973) posited resource mobilization theory, which argues that the success of a social movement depends on the resources available to it – including members – and the extent to which they are able to use or mobilize these

resources. For scholars in this tradition, resource mobilization theory explains the frequent competition for membership among social movement organizations (see also Zald & McCarthy, 1987). In a related tradition, Tilly (1978) and McAdam (1982) developed political process theory, alternately known as political opportunity theory, an influential framework that explains the relative success of social movements as a product of their political opportunities, organizational structures, and internal analyses or framings. Generally speaking, with its focus on developing theory, this literature has tended toward taking a macro- or sometimes meso-level approach to studying social movements. While these are significant frameworks, my work focuses less on explaining *why* educators' social movements have developed or *whether* they have succeeded, and more on *how* they have developed and grown. I do build on Mauss's framework for the five stages of social movement development, which was influential in extending my findings on the phases of caucus development explored in Chapter 6.

A related but distinctive tradition of scholarship looks at framing processes in social movements, building on Goffman's (1974) concept of "frame analysis." Snow and Bedford (1992) define frames as "interpretive schema that enable individuals to locate, perceive, identify, and label occurrences within their life space and the world at large" (p. 137). Benford and Snow (2000) likewise define frames as cultural processes that "assign meaning to and interpret relevant events and conditions in ways that are intended to mobilize potential adherents and constituents, to garner bystander support and to demobilize antagonists" (p. 614). While the concept of frames is widely debated in the literature, perhaps due to its quick rise in popularity among scholars, it does inform some elements of this project.

A more recent tradition in social movement scholarship has highlighted cultural processes within social movements, offering a number of relevant insights for this project. Polletta (1998a) emphasizes the importance of narrative processes in social movements, arguing that storytelling is a key element integral to three elements of social movements: "1) recruitment occurring before the consolidation of formal movement organizations; 2) the conditions under which movement organizations are able to rebound from strategic setbacks; and 3) the impact of movements on institutional policymaking" (p. 419). Polletta (1998b) further differentiates narrative analysis of social movements from frame analysis, noting that narratives are powerful in part because of their structure as stories and their ambiguity, which encourage interpretation, whereas frames are supposed to be clear and instrumental (p. 139). Drawing on his own research and the studies collected in *Stories for Change: Narrative and Social* Movements, Davis (2002) notes that stories serve a wide range of functions in social movements: "producing, articulating, regulating, and diffusing shared meaning" (p. 22). He also notes how – through narrative analysis – we can better understand multiple phases of social movement development, including "emergence, recruitment, internal dynamics, resource mobilization, and public persuasion" (p. 22). Other scholars emphasize the importance of emotions in social movements. Likewise, in *It Was Like a Fever: Storytelling in Protest and Politics*, Polletta (2006) examines the role of storytelling in social movement organizing, reviewing cases spanning several centuries and furthering her argument that stories' power lies in part in their ambiguity.

Other scholars highlight cognitive and emotional processes within social movements. Goodwin, Jasper, and Polletta (2001), for example, examine the role of

emotions in social movement organizing in their edited collection *Passionate Politics*, paying attention to the emotions underlying both internal organizing and external contestation. Eyerman and Jamison (1991) advance the idea of cognitive praxis, or the learning processes by which organizers develop a shared identity for their movement, which in turn shape the understandings of broader society. Diani (1996) likewise argues that movements can develop "interpretive frames" or lenses through which to understand the world, and that these can include antisystem frames, inclusion frames, realignment frames, and revitalization frames. These traditions are helpful in understanding the collaborative processes through which movement organizers make – and contest and remake – meanings of the world.

In a related tradition, social movement scholars have discussed the processes through which social movements develop a collective identity. Melucci (1996) defines collective identity as "an interactive and shared definition produced by a number of individuals (or groups at a more complex level) concerning the orientations of their action and the field of opportunities and constraints in which such action is to take place" (p. 70). Polletta and Jasper (2001) note that social movement scholars draw on the theory of collective identity to explain why movements form, why organizers take action, why movements decide on particular strategies, and why movements change cultural norms and understandings. Arguing that collective identity has been overemphasized in recent literature, they offer an alternative definition of collective identity: "an individual's cognitive, moral, and emotional connection with a broader community, category, practice or institution." They further argue that collective identity differs from personal identity and that it can be seen as a "shared status or relation, which may be imagined rather than

experienced directly" (p. 285). They note the role of collective identity in four key steps in social movement organizing: "creation of collective claims, recruitment into movements, strategic and tactical decision making, and movement outcomes" (p. 285). These frameworks have proven useful for some of my findings on the cultural practices of social movements.

How do educator organizers change schools, unions, and society?

Within the social movement literature, an increasing number of scholars have likewise turned their attention to *how* organizers change society within social movements. In what might be called the relevance turn, social movement scholars in the United States have moved toward research that is grounded in the experiences and analyses of social movement organizers and thereby more relevant and potentially useful to their movements. Flacks (2004) and Bevington and Dixon (2005) have issued calls for "movement-relevant theory," including both a recognition of the value of activists' own theoretical frameworks within academia and a shift toward "academic social movement theory that is useful to movements or activists" (Bevington & Dixon, 2005, p. 186). By highlighting the value of developing theories on social movements that are relevant to the movements themselves, Flacks (2004) and Bevington and Dixon (2005) are not disowning all previous scholarship in their field. Rather, they are suggesting that the most valuable work in their field is immediately relevant to the participants in movements.

The framework of "movement-relevant" scholarship has been useful as both a model for this project and a resource for insights on the cultural practices of social movement organizers. Some texts within this tradition are used or referred to by social movements organizers. Jo Freeman's (1972) *The Tyranny of Structurelessness,* for

example, remains an important touchstone for organizers considering the implications of horizontal or vertical decision-making structures. An even more popular text within several caucuses is Jane McAlevey's *No Shortcuts: Organizing for Power in the Gilded Age* (2016). In this text, which draws from her experiences as a health care worker organizer as well as her dissertation in sociology, McAlevey outlines three major ways that labor organizers attempt to transform their conditions and context: advocacy, mobilizing, and organizing. She focuses her attention particularly on the latter two processes, arguing that only organizing can build significant change because this model engages all members of a given workforce or union, rather than just the activist members who are already in agreement with the principles of the union or broader movement. Supporting a similar model, Labor Notes' *Secrets of a Successful Organizer* translates some of the lessons from the Chicago Teachers Union's successful 2012 strike and other movements into a manual for organizers, which includes handouts and resources (Bradbury et al., 2014).

Many of the most influential texts for social movement organizing come from popular histories, biographies, and case studies of social movements. Educators in the WE caucus, for example, have discussed Ransby's (2003) *Ella Baker and the Black Freedom Movement: A Radical Democratic Vision*, as a model for democratic grassroots organizing for racial justice. Educators in SEE and other caucuses have similarly discussed Blanc's recent (2019b) *Red State Revolt: The Teachers' Strike Wave and Working-Class Politics*, a history of this movement that analyses it as a class struggle, as part of their campaign to build power for statewide struggles. Several caucuses have drawn on popular histories of organizing within the Caucus of Rank-and-File educators,

as well, reading *How to Jump-Start Your Union* (Bradbury et al., 2014). This text has proven influential for many caucuses and networks, joining Weiner's (2012) *The Future of Our Union* as a key text for groups emerging over the past five years.

While these histories and case studies arguably offer the most "movement-relevant" scholarship on social movement organizing, there is a growing tradition of scholars developing social science research in collaboration with social movements that is grounded in the everyday work of organizing, many of them using the methodology of activist or militant ethnography (Sutherland, 2013). These studies offer particularly rich examples of how to study and write within social movement organizations, as well as providing theoretical frameworks for conceptualizing the work of networks like UCORE. In his foundational study within this tradition, *Networking Futures: The Movement against Corporate Globalisation*, Juris (2008) offers a case study of the Movement for Global Resistance using militant ethnography. In this study, he draws on his experiences in the movement to offer an analysis of the micropolitics of organizing in a horizontal activist network, paying particular attention to how organizers in this movement use democratic processes and new technologies to make decisions and plan campaigns across several cities. He likewise illuminates the role of grassroots networks in social movements in offering "relatively sustainable platforms for generating alternative ideas, discourses, and practices, allowing activists to pursue their strategic and prefigurative goals in more lasting ways" (p. 10).

Other scholars in this literature focus their attention on the significance of culture and strategy in social movement organizing. In *Direct Action: An Ethnography,* David Graeber (2009) offers an activist ethnographic case study of Global Justice Movement,

providing rich descriptions and analyses of counter-hegemonic, democratic organizing with the New York City Direct Action Network (NYC-DAN) leading up to the Summit of the Americas protests in Quebec City in 2001. In their collection, *Strategies for Social Change,* Maney and Kutz-Flamenbaum (2012) similarly bring together a number of studies developed through activist-researcher partnerships which explore the links between culture and strategy in social movements. These essays highlight the micropolitics of strategic organizing in social movements, elucidating common processes for how strategies (or plans for collective action) are developed. In their introduction to this volume, Maney, Andrews, Kutz-Flamenbaum, Rohlinger, and Goodwin (2012) define strategy as "a plan of collective action intended to accomplish goals within a particular context" (p. xvii). They likewise identify eight key parts of the process of strategy development in social movements: "1) clarifying goals and formulating demands; (2) constructing constraints, threats, and opportunities; (3) envisioning sequences of actions and reactions; (4) resolving choice points; (5) developing emotional dynamics; (6) considering models of action; (7) agreeing (or disagreeing) on roles; and (8) revisiting and assessing the effectiveness of strategic choices once implemented" (p. xx).

Several scholars in this tradition (e.g. Maeckelbergh, 2011; Swain, 2019; Yates, 2015) have drawn attention to the significance of how organizers make decisions and plan campaigns, pointing out how they develop and participate in the very structures and processes they are calling for through their social movement. This concept, referred to as *prefiguration* in the social movement literature, is helpful in understanding the significance of decision making and organizing processes in social movements. In her

activist ethnographic case study of organizing in the alterglobalization movement, Maeckelbergh (2009) offers a helpful analysis of prefiguration in this movement, paying particular attention to the participatory democratic processes activists use in their organizing and decision-making (Maeckelbergh 2009). In her article, "Doing Is Believing: Prefiguration as Strategic Practice in the Alterglobalization Movement," Maeckelbergh (2011) expands on this model to discuss prefiguration as a form of movement strategy, arguing that through prefiguration social movement organizations are developing the structures and culture they are demanding within their movement.

Other scholars have highlighted learning and knowledge production in social movement organizing, in some cases drawing on cognitive and cultural analyses of social movements reviewed in the previous section. In many cases, scholars in this literature bridge multiple traditions, including research on adult education and social movements. In *Learning in Social Action: A Contribution to Understanding Informal Education*, Foley (1999) highlights learning in social struggles through his case studies of movement organizing in Australia, Brazil, the United States, and Zimbabwe. In *Union Learning,* Taylor (2001) offers a history of education initiatives led by labor organizations in Canada, linking these initiatives to the potential to grow the labor movement. Hall and Clover (2005) offer a framework for understanding learning in social movements, including internal learning among members of that movement and external learning by others who encounter that movement. Casas-Cortés, Osterweil, and Powell (2008) likewise argue that movements should be understood as "spaces and processes in which knowledges are generated, modified, and mobilized by diverse actors," emphasizing the importance of "knowledge-practices" within movements (p. 20).

Conway emphasizes the importance of networks in movement learning and knowledge production, focusing on learning in the Metro Network for Social Justice in Toronto (Conway, 2005) as well as anti-globalization movements (Conway, 2011). Cox (2014) similarly highlights the importance of knowledge production in social movements, arguing that sharing knowledge from social movements is one way that sociological studies of these movements can be "genuinely relevant" (p. 955). In this article, he highlights a range of spaces that allow for knowledge production and sharing among movement organizers, including the Irish Grassroots Gathering Process, which facilitates spaces for organizers to learn from each other's struggles. In *Learning from the Ground Up: Global Perspectives on Social Movements and Knowledge*, Choudry and Kapoor (2013) offer a collection of articles on social movement learning, in many cases featuring the voices of organizers in these movements, including contemporary labor movements (Bleakney & Morrill, 2013). Choudry (2015) also offers insightful analyses and examples of radical adult learning within social movements in Canada, the Philippines, and other contexts in *Learning Activism; the Intellectual Life of Contemporary Social Movements.* Likewise, in his two-volume edited collection, *The Movements of Movements*, Sen (2017) features the analyses of organizers in a wide range of twenty-first century movements, highlighting their knowledge production. These studies relate closely to an important tradition in the adult learning and teacher education literature, which investigates the ways that educators learn in community with each other (Cochran-Smith & Lytle, 1999).

Outside of the field of social movement studies, sociologists have highlighted the motivations underlying activists' organizing, including ethical principles, personal interests, strategic plans, and collaborative visions. Warren (2010) offers the "head, heart,

and hand" model to explore the rational, ethical, and practical dimensions of the work of white activists organizing for social justice. Other researchers explore the role of individual interests in educators' efforts to organize, including the "interest-convergence" model (Bell, 1980).

Moreover, within the educational studies literature exist a growing but still quite limited number of studies understanding educators' organizing as a social movement. In her case study of organizing in the British Columbia Teachers Federation (BCTF), Rottmann (2013) uses social movement organization theory, in particular the work of McCarthy and Zald (1977) and Zald and Berger (1978), to discuss the BCTF as a Social Movement Organization (SMO) organizing to share resources and effect change. Thapliyal (2013) explores the Landless Workers' Movement (Movimento dos Trabalhadores Rurais Sem Terra - MST) in Brazil as form of adult education within a social movement, drawing on Fraser (1990) to argue that the movement represents a "counterpublic" within "strong competing publics." As previously discussed, Tarlau also draws on the social movement literature to discuss how the Landless Workers' Movement successfully transformed social institutions without declining or becoming corrupted (Tarlau, 2105; Tarlau, 2019). Maton likewise draws on the social movement literature to explore the work of the WE caucus in Philadelphia, conceptualizing this caucus as a SMO (Maton, 2016a; Maton, 2018). More research is needed in this area, particularly in understanding the cultural practices of educator organizing within social justice caucuses and contemporary educator movements.

Conceptualizing the UCORE Network.

In my research, I draw on each of these frameworks and their connected literatures to understand social justice caucuses and the UCORE network as a whole, highlighting how they help us to understand the cultural practices of organizers and the significance of their work. In conceptualizing how policies move and change across this network, I draw on a number of additional frameworks. In particular, the interdisciplinary field of critical policy offers useful frameworks for analyzing the movement of policies within counter-hegemonic networks like UCORE. Likewise, a developing tradition within scholarship on social movements highlights the cultural practices that facilitate the movement of practices and policies across social movements.

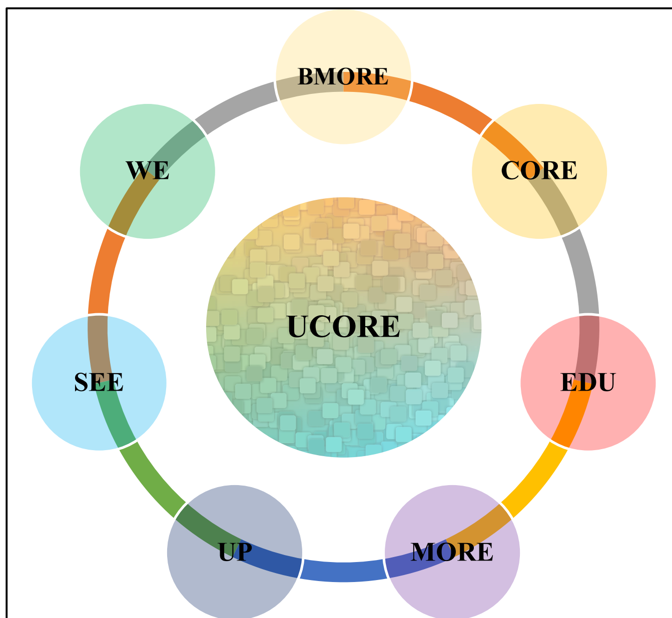

Figure 2.

Conceptual Framework for UCORE as a Counter-Hegemonic Policy Network Linking Social Justice Caucuses in Contemporary Educator Movements. (Note: seven of over twenty caucuses listed as examples.)

In this section, I will contextualize these literatures and discuss their relevance to research on counter-hegemonic networks like UCORE. Drawing on these literatures, I will argue that UCORE can be understood as a counter-hegemonic solidarity network organizing against the neoliberal policy networks explored in scholarship by Ball (2014), Peck and Theodore (2015), and others. I will further argue that the UCORE network has been

fundamental in the spread of social justice unionist practices and the development of contemporary educator movements, drawing on the social movement literature.

UCORE as a counter-hegemonic policy network.

Broadly speaking, research on education policy can be categorized within one of two major literatures. I will refer to the first of these literatures as traditional policy studies and the second as critical policy studies, adapting the typology proposed by Diem, Young, Welton, Mansfield, and Lee (2014). While there are active debates and variations within these literatures, they differ in significant ways in how they conceptualize what policies are and how they move. With this in mind, I will briefly review both traditional and critical policy studies before discussing frameworks in both traditions for understanding how policies move across time and space, focusing particularly on their relevance to research on counter-hegemonic networks.

The traditional policy studies literature includes predominantly positivist, rationalist scholarship in the discipline of political science (Ball & Shilling, 1994; Peck, 2011; Young & Diem, 2017). Within this literature, scholars generally offer straightforward interpretations of what policies are and how they are translated and implemented in new contexts. The development of policies is largely seen "as a deliberate process, undertaken by a bounded set of actors, who use research and reason to ensure the best possible policy outcomes" (Young & Diem, 2017). The critical policy studies literature includes critical and interpretive scholarship from a wide range of disciplines, including anthropology, critical geography, and policy sociology. In many cases, scholars in this tradition use Foucauldian discourse frameworks to study policies (Marshall, 1997; Taylor, 1997).

Scholars likewise note the role of values in this tradition. For Prunty (1984), critical policy studies offer a “vision for a moral order where justice, equality, and individual freedom are uncompromised by the avarice of a few” (p. 42). Likewise, Grimley (1986) argues that many scholars using critical policy studies have the “aim of creating a praxis - a coalescing of thought and action - in which social theorizing arises from, and is immediately concerned with, social action” (p. 24). For Grimley, this praxis is “value explicit” and counters hierarchies in traditional policy analysis and policymaking by integrating insights from “participants from all areas of policy involvement on an equal footing basis” (p. 24). These perspectives on critical policy studies have informed both my analysis of UCORE as a counter-hegemonic network and my broader thinking on this project.

Within the transdisciplinary critical policy studies literature, scholars have challenged traditional conceptualizations of “the nature of policy, how it is created, its impact, and traditional approaches to policy analysis” (Diem, Young, & Sampson, 2019), offering alternative frameworks that are relevant to this study. Within this tradition, Ball (2015) suggests that the very concept of policy is more complex in the critical literature, noting that “policies are ‘contested’, mediated and differentially represented by different actors in different contexts (policy as text), but on the other hand, at the same time produced and formed by taken-for-granted and implicit knowledges and assumptions about the world and ourselves (policy as discourse)" (p. 311). He further notes that there are tensions in the way people – students, teachers, community members – are framed within this literature. He outlines the ways that they are alternately framed as policy subjects, shaped by dominant discourses, and policy actors, resisting existing policies and

shaping new ones in turn: “The contemporary educational subject, from pre-school to higher education, is then governed by others and at the same time is governor or of him/herself” (p. 310). This is a useful distinction for my analysis of educator organizing in the UCORE network, within which I largely consider educator organizers to be policy actors, while recognizing the ways they have experienced reforms as policy subjects.

Scholars in the traditional policy studies literature offer a number of frameworks for understanding the movement of policies across time and space: policy borrowing (Spreen, 2004; Steiner-Khamsi, 2016), policy diffusion (Berry & Berry, 1990; Crain, 1966; Walker, 1969), policy learning (Rose, 1991) and policy transfer (Weyland, 2007). We can glean a number of insights from these frameworks for the study of how policies move in counter-hegemonic networks. Some scholars within these traditions have highlighted the role of sociopolitical context in the adoption of new policies, including both local and regional factors (Berry & Berry, 1990). Other scholars in this tradition have noted the role that networks and “policy entrepreneurs” play in the diffusion of new policies or “innovations” (Mintrom & Vergari, 1998). Scholars in these traditions have also made important distinctions between policymakers *learning* from other contexts as they are developing solutions in their own, as opposed to *imitating* those policies with no consideration of their local context (Shipan & Volden, 2008). Likewise, in the “policy borrowing” literature in the field of comparative education, scholars have offered frameworks that integrate insights from the critical and traditional policy studies literatures, which Steiner-Khamsi (2014) discusses as “normative” and “analytical” traditions in the policy borrowing literature, in many cases highlighting the political

dimensions of policy borrowing among states, NGOs, and global policy entrepreneurs (Spreen, 2004; Steiner-Khamsi, 2016).

While these insights have informed my analysis in this project, much of the traditional policy studies literature is of limited relevance to the study of how policies move in counter-hegemonic educator networks. To begin with, the majority of these studies focus on state and national governments as the space for policy experimentation, in some cases invoking the metaphor of states as "laboratories of democracy" (e.g. Karch, 2007; Rose, 1991; Shipan & Volden, 2008). This focus overlooks the more localized spaces wherein new policies are developed and adapted through democratic processes, including grassroots organizations, schools, social movements, unions, and – particularly relevant to this study – social justice caucuses. It also overlooks the significant critiques of state and federal governments as spaces of genuine democratic participation, including critiques of the roles of corporate donors, NGOs, non-profits, and legislative networks such as ALEC in dictating policy "innovations" (Anderson & Montoro Donchik, 2016; Spreen & Stark, 2014).

Scholars in this tradition also rarely state their own positionality or its relevance to the policies they identify as "innovations," as is the case with Mintrom & Vergari's (1998) uncritical discussion of the spread of policies promoting school choice. Likewise, scholars in this tradition do not generally draw attention to the micropolitics of policy development, implementation, and movement, including the relational nature of how policies spread and change in the twenty-first century (Peck, 2011). Instead, scholars in this tradition often offer rationalist interpretations of the movement of policy as a sequential process (Peck, 2011). Likewise, as the majority of these studies are written

from a normative political science perspective, they generally do not examine the role of power in policymaking.

In many cases directly responding to these frameworks, scholars of critical policy studies offer alternative frameworks for understanding the spread of policies across time and space. In particular, critical scholars have posited the conceptual framework of "policy mobility" (McCann & Ward, 2011) or "policy mobilities" (Peck, 2011). Building on these frameworks, Ball (2014) has explored how policy actors interact through complex transnational networks, shaping and, in turn, being shaped by neoliberal education ideologies. Ball is especially attuned to the role of power in this movement, noting the disproportionate influence of global elites on educational policy and practice. Within the critical geographies literature, Peck and Theodore (2015) build on the policy mobilities tradition to develop an equally strong framework for understanding the cultural and relational dimensions of "fast policy" movement within transnational networks. In this text, Peck and Theodore discuss ten characteristics of the "fast policy condition": "[i]ncreased reflexivity and porosity of policymaking locales"; "[t]ransnationalization of policy discourses, debates, and dialogues"; [c]osmopolitanization of policy actors and action"; [d]eference to global best practices and models;"; [f]oreshortening of research and development phases"; [p]erformance of pragmatism, embracing 'ideas that work'"; "[e]xpansion of the 'soft infrastructure' of global policy development"; "[m]anufacture of 'demonstration effects'"; [a]scendency of systematic 'experimentality' in policy formation"; and [d]eepening relationality' in policymaking processes" (pp. 224-225). Their research is especially useful for understanding the importance of relationships and contexts in understanding how policies move and change in the UCORE network.

As I discuss further in Chapter 9, my findings diverge from the fast policy model in significant ways. Most significantly, the networks described in *Fast Policy* and most other studies in the policy mobility literature detail the processes that facilitate policy movement in neoliberal networks of global elites, while this study details the processes that facilitate policy movement in an expressly anti-neoliberal network of working educators. Connected to this distinction, my research highlights the importance of horizontal, democratic spaces and critical praxis in the movement of policies between UCORE caucuses. Nevertheless, policy mobility in the UCORE network does connect with the fast policy model in important ways, including the importance of reflexivity, "relationality," and "(virtual and physical) learning networks" in educator organizing across the United States (Peck & Theodore, 2015, p. 225). In exploring how this developing literature relates to organizing in the UCORE network, this dissertation suggests what twenty-first-century policy mobility looks like in a counter-hegemonic – rather than neoliberal and hegemonic – network, including the extent to which this mobility could be considered "fast policy."

UCORE as a counter-hegemonic network of social movement organizations.

Outside of the policy studies literature, there is a growing tradition of research that documents how practices spread across networks of social movement organizers. Within the anthropological and sociological literature on social movements, scholars have paid particular attention the role of networks in the development of social movements and the spread of policies across social movement organizations. Scholars within this tradition argue that networks are fundamental to social movements, using traditional case study methods and newer engaged ethnographic methods to trace the

spread of practices across social movements. This literature is particularly relevant if we conceptualize educator organizing throughout the past decade as contemporary educator movements, as I argued previously, and caucuses as social movement organizations.

Within traditional case study approaches to social movements, scholars have highlighted the significance of networks to the development of social movements. Indeed, social movements have arguably always organized in the form of networks, whether local or (trans)national (della Porta & Diani, 2006; Gerlach, 1971; Knoke & Wisely, 1990). Freeman (1999) highlights the importance of networks in the development of social movements, arguing that movements grow out of a pre-existing network that can be co-opted to either respond to a crisis or develop a new organization.

Social movement scholars have also offered useful analyses of the role of networks in the development and success of social movements. Knoke and Wisely (1990) argue that networks foster the growth and success of social movements, while Diani (1997) points to the ways that social movements support the growth of new networks. Other scholars highlight the connections between networks and the importance of relationships in social movements (Diani & McAdam, 2003). In their volume, *Social Movements and Networks: Relational Approaches to Collective Action,* for example, Diani and McAdam (2003) bring together many of the leading scholars focusing on relational and network dimensions of social movements, building an argument that networks are foundational to understanding social movements.

Social movement scholars have also highlighted the role that networks have played in spreading tactics and policies between social movement organizations. Andrews and Briggs (2006) draw attention to the roles that social networks, social

movement organizations, and the media play in spreading tactics in a social movement, focusing on the spread of sit-ins in the civil rights movement as an example. Likewise, Wang and Soule (2012) note the role of collaboration in the spread of tactics between social movement organizations. Other social movement scholars used engaged ethnographic approaches to document the spread of policies and practices in a network. Of particular significance is Juris's (2008) work, which uses militant ethnography to document the "cultural logic of networking" in social movement organizing.

Across the policy studies and social movement studies literatures, a number of frameworks emerge that are useful for conceptualizing how policies move and change across the UCORE network. While the mobilities framework is useful for understanding how policies move and change in the UCORE network, few studies in this tradition consider the nature of policy mobilities within grassroots or counter-hegemonic networks. More specifically, there exist no studies of policy mobilities between social justice caucuses. Likewise, in the social movement studies literature, studies draw attention to the role that networks play in the development of social movements and the spread of social movement tactics, but few studies consider how cultural processes facilitate this movement or apply these considerations to the study of educator labor networks and social movements. In my analysis of how policies move within the UCORE network in Chapter 9, I will therefore consider how my findings align with the policy studies and social movement studies literatures, and what they suggest about future directions for these fields. In particular, I will discuss how the UCORE network offers spaces both real and virtual for educator organizers from across the country to connect

with each other, gather together, share stories and resources, engage in dialogue, develop norms, and link struggles.

Summary and Discussion

In this chapter, I have discussed a range of literatures which are helpful for conceptualizing social justice caucuses and the UCORE network. In my consideration of social justice caucuses, I have reviewed literatures in the fields of educational studies, labor studies, and social movement studies. In particular, I have argued that social justice caucuses integrate practices from grassroots educator organizations, social justice union organizations, and social movement organizations. In offering this argument, I have also expanded upon my claim that social justice caucuses in the UCORE network have led contemporary educator movements: social movements led by rank-and-file educators working to transform their unions, schools, and communities for democracy and justice.

In my consideration of the UCORE network as a whole, I have reviewed the critical policy studies and social movement literatures, discussing their relevance to the network's work. Drawing on these literatures, I have argued that we can understand UCORE as a counter-hegemonic solidarity network that facilitates the spread of social justice unionist practices within contemporary educator movements. In doing so, I have recognized that some scholars in this literature have explored the significance of networks to the spread of education policies and the development of social movements, but they have not yet discussed the role of social justice caucus networks in countering neoliberalism, spreading social justice unionist practices, and furthering contemporary educator movements.

Through my analysis of social justice caucuses and the UCORE network in this dissertation, I will offer a number of contributions to the aforementioned literatures. In dialogue with scholars in the field of educational studies, I will offer empirical research on *how* educators change society. In conversation with research in the field of labor studies, I will illuminate the work of social justice caucuses in the UCORE network, offering qualitative research that highlights the purpose, principles, and practices of social justice caucuses in this network. In consultation with the social movement literature, I will offer a framework for understanding the key cultural practices of social justice caucuses in the UCORE network, emphasizing how these practices support knowledge production and learning in the network, spreading social justice unionist practices and fueling the growth of contemporary educator movements. Moreover, in dialogue with the critical policy studies literature, I will discuss the significance of the UCORE network as a counter-hegemonic solidarity network organizing against neoliberalism and systemic racism.

CHAPTER 4: Research Design

> *We are in a constant state of resistance. We are swimming upstream and we are exhausted.* (field notes, February 28, 2017).

> *The heart of the dynamic is that we don't have organizations with leaders that are ready to fight and invite us into a fight, and we know that a fight is needed.* (E. David Friedman, personal communication, May 21, 2019).

When I began the pilot study that developed into this dissertation in 2014, I was hoping to better understand how educators were organizing against the neoliberal education policies and systemic racism I had experienced as an educator in Delaware and Texas schools. Inspired by organizing in Chicago and Seattle in particular, I began traveling between grassroots educator networks such as the Badass Teachers Network (BATs), the Network for Public Education (NPE), New York Collective of Radical Educators (NYCoRE), and United Opt Out (UOO), conducting field work and oral history interviews for a broader project designed alongside Carol Anne Spreen. As I attended conference sessions and spoke with educator organizers for these projects, I was especially struck by the work of educators representing social justice caucuses.

In a methodological note on March 21, 2015, I reflected on the ways that caucus organizers' work stood out among all of the sessions and movements represented at the annual NYCoRE conference:

> I attended the all-day NYCoRE (New York Coalition of Radical Educators) conference in NY, taking part in sessions led by MORE, the Badass Teachers, United Opt Out, and several smaller nonprofits and schools. The conference went from 9 am until 5 pm. It was fascinating to see differences and similarities in how each group discussed organizing. I

> found the MORE session to be most useful and relevant, and plan to follow up with teachers involved in that organization for interviews. The day was galvanizing, and I found myself thinking at length about what made it so different from other workshops I had attended.

A week later, as I analyzed my field notes from this conference, I began formulating the questions that would drive my dissertation research for the next four years. Building on an analytic memo, I added the category of social justice caucuses to the thematic sample in my pilot study, discussing the trends I had noticed among workshops led by organizers from the Chicago, Philadelphia, and New York caucuses. Only a month later, at the second annual meeting of the Network for Public Education on April 26, 2015, representatives from CORE and other caucuses publicly announced the formation of the UCORE network, and I had the good fortune of connecting with some of the founders and discussing the possibility of collaborating to document, support, and analyze their work in my dissertation research.

This stroke of fortune and the generosity of UCORE organizers shaped the design of my dissertation research. Inspired in part by critical policy studies research on neoliberal policy networks, I initially designed this project as a network ethnography studying UCORE as a counter-hegemonic policy network. As I traveled between caucus meetings and conferences in the UCORE network in 2015 and 2016, I quickly discovered the limitations of this approach, and I began adjusting my methodology to allow for more direct and sustained engagement in social justice caucus organizing. After speaking with organizers in a few caucuses, I decided to move to one of my key sites, Seattle, with the hope of supporting the work of the Social Equity Educators (SEE) caucus. In another stroke of luck, an activist at a SEE solidarity protest supporting Oaxacan teachers encouraged me to apply for a position at a South Seattle high school, and when I began

that position the following August I volunteered to serve as a union representative for the school. From this positionality, I was able to more directly support the caucus in new ways by writing and proposing New Business Items in the Seattle Education Association's Representative Assembly, becoming more active in the caucus and joining the caucus's Steering Committee. As one of the caucus's core members prepared to leave the city, I was invited to replace him as a representative of the caucus within the UCORE network's Steering Committee, as well, allowing me to more formally serve as a policy broker between the caucus and wider network.

In this way, the methodology I used in this project developed organically, beginning as a network ethnography and ultimately taking on a more engaged approach. In 2018 and 2019, as I completed a round of data analysis on my interviews, field work, and documents, I delved more deeply into the social movement literature to contextualize my findings, recognizing important precedents for the focus on cultural practices that had emerged in my findings thus far. Through this process, I encountered the work of other scholars using similarly engaged ethnographic methodologies, including the tradition that most closely resembles the approach I have taken in this project: militant ethnography (Juris, 2008).

In this way, the research design I developed over the course of this project coalesced organically over the course of five years, much as the key practices of social justice caucuses have developed and spread organically over this same period. In this chapter, I will discuss the methodology I have used in this project, which is best described as militant ethnography, highlighting the research questions, methods, data sources, and analytic processes I have used to develop this dissertation. I will also explore

some of the strengths and limitations of this design, especially as they relate to my positionality as an activist scholar and educator directly engaged in social justice caucus organizing in the UCORE network.

Research Question

Using a critical constructivist lens, this dissertation will analyze educator organizing in social justice caucuses using the following core research questions:

1. How do educators in the UCORE network make meaning of the purpose of social justice caucus organizing?
2. How can we explain variations in the purpose of social justice caucus organizing?
3. What ethical principles characterize organizing in the UCORE network, and how do caucus organizers use ethical principles throughout their work?
4. What cultural practices characterize organizing in social justice caucuses?
5. How do cultural practices, strategies, and tactics move between UCORE caucuses?

These questions have guided my research with the UCORE network, in particular my focus on the purpose, principles, and practice of social justice caucuses. I have also used these research questions to connect my dissertation research to broader debates within such fields as educational studies, labor studies, social movement studies, and critical policy studies.

Methodology

To answer these questions, this dissertation draws on five years of militant ethnographic fieldwork within grassroots educator movements, including over four years as a participant-observer in the UCORE network. As a form of critical, engaged

ethnography, the developing tradition of militant ethnography is “a politically engaged and collaborative form of participant observation carried out from within rather than outside grassroots movements” (Juris, 2007, p. 164.) Much like the related traditions of activist (G. Smith, 1990; Routledge, 2013; Sutherland, 2013), critical (Angus, 1986; Anderson, 1989; Madison, 2005), feminist (Craven & Davis, 2013; Davis & Craven, 2016), and political ethnography (Schatz, 2009), militant ethnography enables the researcher to openly engage as a participant in the social movement s/he is studying, directly working with movement organizers to co-construct knowledge. In this way, the tradition of militant ethnography also shares some links to Participatory Action Research (PAR) (Fals-Bordo, 2001; Maguire, 1987).

By engaging in militant ethnographic research, I have aimed to document and support organizers’ ongoing reflections and analyses. As Juris (2007) argues, militant ethnography enables the researcher to create “ethnographic knowledge [that] aims to facilitate ongoing activist (self-)reflection regarding movement goals, tactics, strategies, and organizational forms” (Juris, 2007, p. 165). Throughout my fieldwork, I have focused on the cultural practices of educators organizing in the UCORE network to both document and support this ongoing process of self-reflection. Moreover, in designing this project as a militant ethnography, I have sought to support the self-reflection of movement organizers by offering what Bevington and Dixon (2005) refer to as “movement-relevant theory”:

> To produce movement-relevant theory, it is not enough simply to identify with a movement or study a movement. Instead, there is a distinct process that involves dynamic engagement with movements in the formulation, production, refinement, and application of the research. Moreover, the researcher need not and in fact should not have a detached relation to the movement. Rather, the researcher’s connection to the movement provides

> important incentives to produce more accurate information, regardless of whether the researcher is studying a favored movement or its opponents. (Bevington & Dixon, 2005, p. 190)

This model for movement-relevant research has informed each step of my project, from the development of research questions to the publication of findings. With these definitions in mind, I draw on the methodology of militant ethnography to offer a cultural interpretation of organizing that spans across many sites.

Much like the related tradition of Participatory Action Research (PAR), the methodology of militant ethnography transforms the relationship between the researcher and the people they are documenting. As much of my time over the past few years has been spent organizing and learning alongside UCORE educators, it is more fitting to call them union siblings than informants or participants (Calhoun, 2008, xxii). Moreover, while educators are often framed as policy subjects in the interdisciplinary field of critical policy studies, this project emphasizes my fellow educators' contributions as policy actors. Although the educators in the UCORE caucus are undoubtedly affected – and, in many cases, politicized (see Stark & Maton, 2019) – by racism and neoliberal policies in schools, they do more than react to existing policies or new reforms. Educators in the UCORE network are experimenting with new policies for organizing their schools and unions just as much as they are responding to hegemonic school structures or wrongheaded reforms.

As educators and, in many cases, researchers and writers themselves, organizers in the UCORE network are deeply reflective about both the significance and the shortcomings of their work. In this project, I hope to capture and engage with these co-constructed analyses – the collective *phronesis* (roughly translated as expertise) of my fellow organizers – rather than primarily offering outsider analyses (see Greenwood,

2008; Flyvbjerg, 2001). In doing so, I aim to offer what Haraway calls "situated knowledges" through "engaged, accountable positioning" from a grounded perspective and context (1988, p. 590). While I have not used a Participatory Action Research (PAR) methodology in this project, it is important to note that the learning outlined in this dissertation is not just that of an activist scholar, but also that of a developing social justice unionist. Whether listening to stories of new organizing models on a national conference call or discussing the links between racial capitalism and education in a book group, I spent much of my field work "studying side-by-side" with other educator activists in the UCORE network (Erickson, 2006). Through these experiences and my writing of this dissertation, I hope to document some of the knowledge that organizers in the UCORE network are creating, and the findings shared in this dissertation should therefore be understood as co-constructed through an iterative process of witnessing, discussing, and documenting the analyses of movement intellectuals.

In addition to the methodology of militant ethnography, I am also informed by the traditions of multi-sited (Marcus, 1995) and network ethnography (Howard, 2002). Drawing on these traditions, I trace the cultural processes of caucus organizing across a national network, including at national meetings that bring together caucus organizers, in virtual communications between caucuses on social media, and in a sample of caucuses within key cities, particularly Seattle.

Rationale.

This study uses a qualitative, ethnographic research design for a number of reasons. To begin with, educator organizing is a complex social process that can best be understood in the field. Using qualitative methods, I am able to document the experience

of individuals engaged in social justice caucus organizing, taking into account the "messiness of the lived world" (Rossman and Rallis, 2012, p. 8). The qualitative design of my dissertation also allows me to seek "to understand – and perhaps change – a complex social phenomenon" (Marshall and Rossman, 2006, p. 2). Using qualitative research methods, I am able to trace "the poetics of social and cultural processes" within the UCORE network (Erickson, 2011, p. 56).

In designing my dissertation as an ethnography, I am recognizing the influence of both anthropological and sociological traditions of ethnography within my research design. As a type of ethnography, this dissertation is designed to offer an "engaged, contextually rich and nuanced" depiction of the everyday interactions and experiences of participants within the UCORE network (Falzon, 2009, p. 1). Using "thick description" (Geertz, 1973), I hope to offer nuanced, detailed portraits of cultural processes within and between social justice caucuses in the United States, analyzing these processes as they occur in the field.

In designing this project as a militant ethnography, I am hoping to offer a trustworthy account than would not be possible through less engaged research. By participating in social justice caucus organizing from the positionality of both a member and a researcher, I hope to offer rich descriptions of the lived experience of caucus organizing. I also hope to capture the self-reflections of caucus organizers in both my data and analyses, supporting the ongoing process of reflection among social justice caucus organizers.

In drawing on the traditions of network and multi-sited ethnography, I am recognizing that these traditions can be critiqued for lacking the depth possible within a

single-sited ethnography. To address this potential shortcoming, I adapted my research design to include extended research at a single site alongside both virtual and in-person engagement in spaces that bring educators from the entire network together. I also use "thick description" (Geertz, 1973) to describe both the periods of time I spend in each network site as well as depicting my own "spatial routine" through multiple sites as a "route to ethnographic knowledge" (Falzon, 2009, pp. 8-9). Like many of my participants, I have traveled across the United States to attend meetings and workshops that bring together organizers working toward shared principles within social justice caucuses. In tracing my own research as it spans across the UCORE network between 2015 and 2019, I am offering an interpretation of caucus organizing within a "location in time" rather than solely a "location in space" (Marcus, 2009). This methodology allows me to trace the UCORE network as it develops across multiple sites in the same period of time, documenting the relational dimensions of organizing within (trans)national activist networks. This method also allows me to offer "ethnographic attention to *how* such relations are lived" (Gatt, 2009, p. 107).

Paradigm assumptions.

Using a critical constructivist lens, this dissertation analyzes the cultural dimensions of organizing within a national network of social justice caucuses. By using a critical constructivist lens, I hope to understand both social justice caucuses' positionality within systems of power as well as the relationship between their own meaning-making processes and these systems. As a critical constructivist, I have designed this dissertation under the assumption that knowledge, reality, and human existence are socially constructed, and that all individuals "construct the world and our lives on a particular

social, cultural, and historical playing field" (Kincheloe, 2005, p. 2). In framing my work using the tradition of critical constructivism, I hope to build on some of the insights from interpretivist, critical, and post-structural traditions, while recognizing the tensions that exist in reconciling the relationship between individual meaning-making processes and broader discursive systems.

In my dissertation research, I take into account the ways that power influences how knowledge and social realities are constructed within caucus organizing, drawing on critical constructivist, critical, and post-structuralist theories. My research has shown that the role of power is widely discussed among caucus organizers, who often discuss how their own positionality and privilege inform their understanding of unionism and educational justice, as well as how they hope to "build power" through their organizing.

Qualitative research strategies employed.

As a dissertation building on the methodology of militant ethnography, this study draws largely on the methods developed by anthropologists and sociologists engaging in ethnographic research. Ethnography allows researchers to integrate a wide range of methods, including observations, interviews, field notes, audio recordings, and document analysis. These methods grow out of the ethnographic tradition of participant observation. In the case of ethnographic research within the UCORE network, this means traveling between spaces that bring caucus organizers together, including national conferences, city caucus meetings, and site-based actions such as rallies and marches. Using both traditional and new methods in ethnography, I have been a participant-observer in the most participatory sense possible, organizing alongside members of social justice caucuses in order to both support and better understand their work.

Methods

Site selection and sampling.

Building on my previous experiences as an educator organizing against high-stakes tests in Texas from 2012 to 2013, I began studying educator organizing against privatization and systemic racism in the United States in early 2014, shifting toward a more specific focus on social justice caucus organizing in April of 2015. Beginning that year, I began working in direct collaboration with organizers in the UCORE network, focusing my project more specifically on the cultural practices of educators organizing across that network.

In the first phase of this project, I spent a year traveling across the country to spaces that bring caucus organizers together, participating in grassroots conferences, online forums, caucus meetings, and conventions. I also conducted an initial round of oral history interviews with educators active in these caucuses, which will be published in a volume co-edited by Carol Anne Spreen. In the second phase of this project, I used both social network (Howard, 2002; Wasserman & Faust, 1994) and thematic (Charmaz, 2006) sampling to identify four of the most engaged and widely discussed caucuses in the UCORE network at that time for multi-sited (Marcus, 2009)

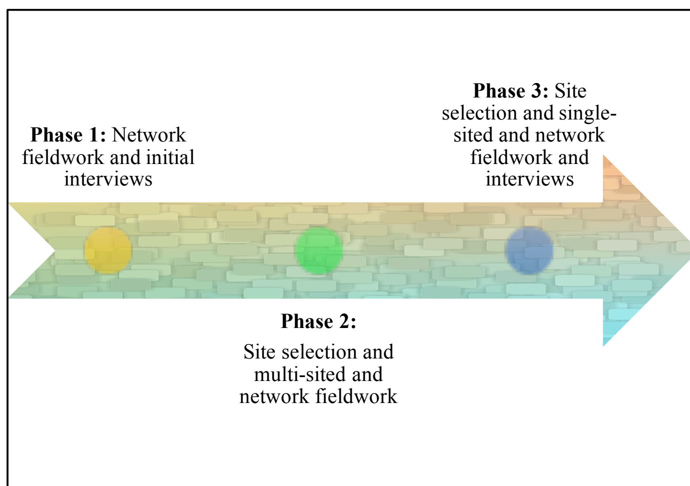

Figure 3.
Research Phases.

ethnographic research: the Caucus of Rank-and-File Educators (CORE) in Chicago, the Social Equity Educators (SEE) in Seattle, Union Power (UP) in LA, and the Caucus of Working Educators (WE) in Philadelphia. I then spent another year conducting more focused observations and interviews at these sites, including participating in such collective actions as the 2015 Seattle educators' strike and the 2016 one-day Chicago educators' strike. Throughout this phase, I continued participating in spaces that bring caucus organizers from across the country together. Both the first and second phase of this project were informed by the traditions of network (Howard, 2002) and multi-sited (Marcus, 2009) ethnography.

In the third phase of this project, I worked with several UCORE organizers to select a single site for direct engagement as a caucus member. Of the four caucuses where I had been conducting additional observations, two caucuses emerged as possibilities for more direct engagement, based on the interest of organizers at those sites and the potential for on-the-ground organizing in frequent caucus meetings and ongoing campaigns. Of these two sites, I selected the Social Equity Educators caucus in Seattle for logistical and theoretical reasons, as organizers noted that this caucus had not been extensively documented and could benefit from additional organizing support to help it continue to grow. I then spent three years – from March of 2016 to August of 2019 – engaging in the UCORE network as a member of the Social Equity Educators (SEE) caucus in Seattle and as a delegate for the SEE caucus within the UCORE network. As a member of the SEE caucus, I have had the opportunity to more directly engage in the purpose and practices of caucus organizing. This has included participating in ongoing processes of reflection within the caucus, such as the revision of the caucus name,

mission, and points of unity in 2017-2018. In this phase, I also conducted an extensive round of interview with caucus members from throughout the UCORE network, focusing particularly on the caucuses I had selected in phase 2.

Throughout each of these phases, I gathered data that includes documents, field notes, meeting minutes, semi-structured interviews, and social media posts. Drawing on these data, I used Dedoose to engage in an iterative process of document and data analysis, using analytic memo writing, open coding, and focused coding (Charmaz, 2006). Through this analysis, I have developed findings that illuminate the purpose, principles, and practices of caucus organizing, both within and between social justice caucuses. Based on these findings, I have written several academic conference papers, which form the basis for this dissertation.

Participant selection and sampling.

Within the pilot and preliminary phases of my dissertation research, participants were selected based on their involvement as either organizers, leaders, or participants in workshops on organizing for social justice. Preliminary field interviews were conducted to understand participants' involvement in these organizations and interest in participating in the broader study.

In the consideration of final dissertation sites and participants, I engaged in an iterative process of theoretical sampling (Charmaz, 2006). As Charmaz (2006) notes, "theoretical sampling helps you to check, qualify, and elaborate the boundaries of your categories and to specify the relations among categories" (p. 205). Within my own research, this process allowed me to shift my theoretical categories, unit analysis, and sample throughout the research process. As discussed above, I used theoretical sampling

to select four sites for additional study. Using this process, I also reached out to individuals who are active in a social justice caucus who have participated in the UCORE network as well as other grassroots or union networks. In a first round of interviews in 2015, I conducted snowball sampling to interview participants recommended by the initial thematic sample. In the second round of interviews in 2019, I reached out to additional organizers in the UCORE network who I had worked with over the course of my four years of engagement in the network, as well as additional representatives of the four sites where I had conducted multi-sited research.

In reaching out to potential participants, I was mindful of including perspectives from educators and organizers with a range of gender and racial identities, as well as a range of organizing experiences. In doing so, I endeavored to include participants whose demographics mirror the network as a whole. While many labor and labor organizations include disproportionately male, white leaders, even when organizing educators, the vast majority of Steering Committee members and organizers in the network are women. On a recent steering call, for example, nine of eleven participants were women (field notes, May 19, 2015). And while the network remains disproportionately white, key organizers from caucuses across the country are people of color, and there is a shared sense of purpose in supporting the leadership of educators of color among organizers across the network to further diversify the demographics of the network. With this in mind, I strove to interview more women than men among key organizers in the network, as well as reaching out to organizers of color within each of the key sites I am studying as well as the network as a whole.

Access and role.

As a participant-observer working with the support of the UCORE Steering Committee, I have had the opportunity to participate in meetings and workshops that bring together members of social justice caucuses throughout the United States. In order to document organizing within the UCORE network, I have attended caucus meetings, workshops, and national conventions as a participant-observer, often using Spradley's (1980) matrix to guide my observation notes while attending these meetings. In my participation in the network, I have presented myself as a doctoral candidate studying social justice unionism as well as a member of the SEE caucus since 2016. Even in public meetings, I have documented the organizations rather than the names of participants, as well as not documenting the names of organizations that are not publicly known. This protocol developed out of conversations with members of the UCORE Steering Committee about how to best support the organization's work with my research.

Data collection.

Because educational activism occurs in varying degrees in different contexts, this study focuses on caucus organizing at national meetings and within member caucuses located within four major U.S. cities that have faced prominent education struggles within the past decade: CORE caucus in Chicago, the WE caucus in Philadelphia, the UP caucus in Los Angeles, and particularly the SEE caucus in Seattle. In the first year of my project, I conducted ethnographic observations at meetings and workshops held within these cities to the extent possible, and in subsequent years I conducted extensive participant observations as a member of the SEE caucus in Seattle. I also conducted participant observations in spaces that bring UCORE organizers together throughout this

period, serving as a representative of the SEE caucus as well as a researcher on UCORE monthly virtual calls and at annual meetings.

At each site, I fulfilled a participant-observer role, following in the tradition of ethnographic research. In some cases, this allowed me to take ethnographic field notes, often offering an edited version of these notes as meeting minutes to support the organizers' work. In other cases, however, my participation involved engaging in roundtable discussions, informal conversations, strategy discussions, and collective actions ranging from rallies to walk-ins to strikes. In the meetings that are documented in this dissertation, I have been open about my research interests and role with both event organizers and participants. Likewise, I have followed a note-taking protocol that was developed in collaboration with UCORE network organizers, documenting only the names of publicly known organizations rather than individual participants.

I also conducted extensive ethnographic interviews with over forty-five organizers working within the aforementioned caucuses, conducting at least four interviews per caucus, as well as conducting ethnographic interviews with other active members and supporters of the UCORE network. In conducting these interviews, I primarily structured the ethnographic interviews as open-ended oral histories detailing the work of caucus organizers, as well as asking descriptive, structural, and contrast follow-up questions to explore the cultural processes that characterize caucus organizing (Spradley, 1979).

At each organization's workshops, meetings, and actions, I collected documents and visuals related to the organization, as well as taking in-depth field notes of public discourse and semiotic features at the workshop. Documents collected for this study

included materials available to workshop and meeting participants, as well as caucus supporters: programs, handouts, mission and vision statements, newsletters, and reports. In addition to these documents, I documented and analyzed related blog entries, public social media posts, interviews, and other public scholarship by UCORE organizers.

Data Analysis Methods

Throughout this project, I have engaged in a continuous, iterative process of data collection and analysis to illuminate the cultural processes that characterize organizing in the UCORE network. Drawing insights from such traditions as constructivist grounded theory, document analysis, and social network analysis, I recursively interpreted research data such as field notes, interviews, and documents. At every stage of my research, I conducted initial and focused coding, theoretical sampling, memo writing, and sorting (Charmaz, 2006). This systematic approach allowed me to identify abstract analytic categories as they emerge from within my data through a process that is abductive, iterative, and reflective. It also allowed me to offer a rich analysis of social and cultural processes within the UCORE network caucuses, illuminating new categories within the study of social change and teacher unionism (Charmaz, 2006, p. 15). To assist with data analysis and management, I used the program Dedoose as well as secure electronic files. These data analysis methods have allowed me to systematically "record the life of a particular group" through "sustained participation and observation in their milieu, community, or social world," recursively analyzing these observations throughout my dissertation research (Charmaz, 2006, p. 35).

Over the course of this project, I have also used document analysis (Prior, 2011) to analyze the cultural and ethical dimensions of mission statements, newsletters, meeting

minutes, posters, social media posts, letters to the editor, and blog posts by caucus organizers. This method can be understood as the "study of documents in their social setting – specifically on how documents are manufactured and how they function rather than simply what they contain" (p. 4). While it might be tempting to understand documents as static artifacts, Prior notes that documents are situated in "networks of action" (p. 2). I paid particular attention to how these documents function in the workshops themselves, and how workshop leaders encourage them to be used in future settings.

Lastly, in analyzing the relations between caucuses within the UCORE network, I drew on the analytic tools of social network analysis (Scott, 2005; Wasserman & Faust, 1994). In the first phase of this project, I documented and analyzed the times when caucus organizers mentioned or interacted with caucus organizers in another city during interviews, field observations, or social media posts. This helped me identify the CORE, UP, SEE, and WE caucuses as sites for further research, alongside my thematic analysis. As I continued in my project, however, I noted that my findings would have been different if I had conducted this same process even a few months later, as caucus organizers closely follow and discuss major developments and strategies in other contexts. With this in mind, I found social network analysis to be a less useful method for the movement of policies and ideas across the network than I had anticipated, and I shifted my focus toward militant ethnographic methods rather than social network analysis in the subsequent phases of my project.

Criteria for Evaluation

As a critical constructivist researcher, I have endeavored to meet Lincoln, Lynham, and Guba's (2011) criteria for "goodness or quality" in critical constructivist research. For them, critical constructivist research is good if it is trustworthy, authentic, and serves as a "catalyst for action." In my research, I have met the criteria of trustworthiness and authenticity through my direct, sustained engagement in social justice unionism for over four years, my rigorous notetaking throughout this process, and my "thick" (Geertz, 1973) description and reflective interpretation of organizing in the UCORE network. Like other scholars within the tradition of militant or engaged ethnography (Juris, 2007; Maeckelbergh, 2009), I have found that my direct engagement in the UCORE network has deepened my understanding of the purpose of caucus organizing. Like Maeckelbergh (2009), for example, I found that I learned more about the processes that characterize caucus meetings when I shifted from observing those meetings to actively participating in and facilitating them. Moreover, like Juris (2007), I found that my engagement as a member of a social movement allowed me to participate more fully in the processes of self-reflection that characterize that movement's work. For example, I found that I understood social justice caucuses' focus on union democracy much more deeply after I had organized as a representative within my union and spoken at Representative Assemblies and General Membership Assemblies.

By offering a trustworthy account of these reflections, I hope to contribute to the ongoing process of learning among caucus organizers. I have also endeavored to meet the criteria of catalyst for action by serving as a policy broker between the SEE caucus and the wider UCORE network, sharing insights from my broader research as they are

relevant on the ground, as well as sharing updates from Seattle with the wider network. Likewise, I have aimed to meet this criteria by sharing my research in venues that are useful for both researchers and practitioners, including public scholarship and a book of the oral histories of educator organizers co-edited by Carol Anne Spreen.

Researcher as Instrument Statement

In keeping with the tradition of critical constructivism, I am committed to recognizing and communicating the ways that my interpretations are culturally embedded based on my paradigm perspective and positionality (Kicheloe, 2005). By discussing how my subjectivity has informed this project, I hope to detail my research process and findings in a way that allows readers to understand how I came to develop this particular account of organizing within the UCORE network. With this consideration in mind, I will briefly review both my sociopolitical positionality and my connections to educator organizing.

The public education system in the United States mirrors the deep racial and economic inequalities that characterize the nation as a whole. As a critical constructivist, I strive to recognize that the ways that my positionality shapes my work as an educator, scholar, and organizer within this context. Like many current and former public school teachers, I am a white, middle-class woman. And while I have organized and spoken against educational and racial inequalities ranging from gifted education to tracking to residential segregation, I recognize the ways this positionality has enabled me to benefit from and contribute to these and other inequalities.

I also recognize the tensions that exist between this positionality and my work as a critical researcher, educator, and developing social justice caucus organizer. My work

in each of these areas is grounded in a belief that the current education system reproduces and often exacerbates existing social inequalities. It is also grounded in the belief that public education and other social institutions need to be restructured to be more equitable and humane. In my work as a critical, progressive, and anti-racist educator and scholar, I have endeavored to support movements that are leading this change. This political positionality has informed my research interests as well as my decision to organize as a Steering Committee member of the Social Equity Educators caucus in Seattle and a supporting member of other caucuses in the UCORE network. While I am deeply supportive of the mission of this and other caucuses in the network, I also recognize the importance of multiple perspectives and critical reflexivity within movements. With this mind, I aim to balance my support of caucus organizing with my recognition of the ways that members of these organizations – myself included –could better realize their ideals.

Because of the connections between my own experiences and those of caucus organizers, it is important to address the question of objectivity within this project. As a critical constructivist researcher, I embarked on this project with an epistemology that does not prioritize conducting social science research that is free from values or ideologies (Kincheloe, 2005). Indeed, critical constructivism rejects the epistemological foundations of objectivism, as well as the potential for neutral research on education. In place of objectivity, critical constructivists posit that researchers have the obligation to explore and discuss their own subjectivity as it relates to their research, laying bare the values that inform their research design, questions, and analysis.

Although I have not designed this study with the goal of objectivity in mind, my epistemology has been informed by the concept of "strong objectivity" within the

tradition of feminist standpoint theory (Harding, 1993; Harding, 1995). For Harding (1993), a researcher's standpoint alternately constrains or enables their understanding of the world. In this way, more marginalized researchers have a greater ability to understand both their own social situation and the social structures that enable it. Within my own research, I believe that my experiences as a woman in patriarchal labor and educational settings has strengthened my analyses in some ways. However, I also recognize the ways my positionality as a white woman in a system that poorly serves students and educators of color constrains my understanding. With this in mind, I have aimed to continuously reflect on how my positionality might have informed my analysis and how I can better use my work as an academic, educator, and organizer to support struggles for racial and economic justice.

Institutional Review Board and Ethics

In this study, I have used the names of organizations rather than individuals for notes taken at meetings and public events, as detailed in my approved protocol with the University of Virginia's Institutional Review Board (IRB). The only instances when I use a name are when the event is publicized with that organizer's name or the speaker has given express permission for their name to be included with notes for that event. As part of my IRB protocol, participants may choose to either use pseudonyms or their real names based on their selections on the IRB consent form. Depending on the preferences of each organizer and confidentially concerns for their colleagues, I strive to maintain confidentially for each participant within these organizations by assigning them a pseudonym if they choose not to use their own name. Because of the nature of the data

and my own role as a participant-observer, it may be possible to deduce these participants' identities; however, there will be no attempt to do so.

Limitations

While the militant ethnography design of my dissertation will allow me to trace the development of education activism within multiple, interrelated contexts, the organizations featured in this study will not be considered a representative sample, nor will this account be considered the only possible interpretation of educator organizing in the UCORE network (Shields, 2012). Rather, this study will aim to offer one of many possible interpretations of the development of significant social movements, sharing some elements of these movements and their insights with educators, researchers, and organizers in other movements. Through my descriptions of both the methods of this study and my own positionality, I hope to provide the information necessary for the reader to draw their own conclusions and connections to their own contexts. Likewise, by sharing participants' own interpretations of their organizing, its significance, and how their work relates to other contexts, I hope to document and support the ongoing self-reflection of caucus organizers.

In addition to representing one of many possible interpretations, this project is limited in its focus on a national network of caucus organizers. In my research, I have focused particularly on the perspectives and cultural practices of core caucus organizers, rather than other policy actors in their contexts, including other educators, union organizers, students, or parents. While this has allowed me to focus on the significant practices of caucus organizers, who might be seen as a "militant minority" within educators' unions as a whole, it has also meant that I have not offered the contextually-

grounded, multi-level analysis of caucus organizing that would be possible in a single-cited study.

Summary and Discussion

In the project detailed in this dissertation, I have used the methodology of militant ethnography to support, document, and analyze the work of social justice caucuses in the United Caucuses of Rank-and-File Educators (UCORE). Using such traditional ethnographic methods as participant observation, interviews, and document analysis, I have collaborated with organizers in the network for over four years, allowing me to develop a rich understanding and account of social justice caucus organizing between 2015 and 2019. As a critical constructivist researcher, I recognize how my own positionality informs the account detailed in this dissertation. While this positionality does present some limitations, my work as an organizer supporting social justice caucuses has allowed me to gain lived experience of the cultural practices of social justice caucus organizing, as well as allowing me to better participate in and document the (self-)reflections of social justice caucus organizers.

PART TWO:

THE PURPOSE AND PRINCIPLES OF SOCIAL JUSTICE CAUCUSES

Chapter 5: The Purpose of Educator Organizing in Social Justice Caucuses

> *Unionists use the contract to fight for kids, not just for bread and butter issues*. (M. Gunderson, personal communication, July 28, 2015)
>
> *We've got to be able to speak about those issues, as a union, right. So yes, our students' learning conditions, our working conditions, but beyond that: our students' living conditions.* (J. Johnson, personal communication, August 4, 2015)

After the historic Chicago teachers' strike of 2012, both scholars and organizers from across the country reached out to better understand how they could lead similar struggles in their own contexts. In doing so, many learned that this strike would not have been possible if it weren't for the work of educators in the Caucus of Rank-and-File Educators (CORE), a social justice caucus that had won the top officer positions in the Chicago Teachers Union (CTU) in 2010. In the wake of CORE's success and the Chicago teachers' strike, other social justice caucuses formed in cities across the country, including the Caucus of Working Educators (WE) in Philadelphia and the Baltimore Movement of Rank-and-File Educators (BMORE).

As the social justice caucus model spread across the country over the course of the past decade, several other caucuses have gained national attention for leading major strikes and other struggles. After winning elected leadership positions in their unions, caucus organizers led the historic educators strikes in Los Angeles and Oakland in 2019. Likewise, although the statewide strikes in Arizona and West Virginia in 2018 were led by grassroots educator networks, organizers in both struggles directly modeled their work

after CORE and CTU's organizing (R. Garelli, personal communication, May 6, 2019; J. O'Neal, personal communication, May 8, 2019). Organizers in West Virginia and other "red states" have since developed statewide social justice caucuses to continue their work, drawing on the lessons of organizers in other contexts and leading such struggles as the 2019 West Virginia educators' strike.

With caucus organizers leading some of the most significant labor struggles in recent history, it is crucial for activists, educators, and scholars to better understand the purpose of social justice caucus organizing. This goal has informed my research on the purpose driving caucus organizers' work, as well as the cultural practices organizers use to enact this purpose. In this chapter, I explore how caucus organizers conceptualize the purpose of their work, bringing their conceptualizations into dialogue with research on educational change, social justice unionism, and social movements.

Toward a common purpose for social justice caucus organizing.

Within teachers' unions, caucuses have historically pursued at least one of three major goals: to reform their union by advancing a new or different agenda; to elect a slate of candidates to leadership positions; and/or to represent the positions of an affinity group within the union. The majority of social justice caucuses that make up the UCORE network engage in these practices, as well: advocating for a more democratic, social justice unionism model in their unions; campaigning for candidates supporting this model; and bringing together educators who support this model. Nevertheless, caucuses in the UCORE network use grassroots organizing tactics to pursue goals that extend far beyond transforming their unions, engaging in and building contemporary educator movements.

Over the course of the over four years I have spent as a participant-observer in the UCORE network, I have found that social justice caucuses pursue a purpose that aligns with most or all of the following statement: to build rank-and-file educators' power to democratically transform their unions and advance justice in their schools and broader communities. The majority of social justice caucuses develop and share mission statements that integrate these ideas, and in interviews, meetings, and public scholarship organizers often echo the key points of these statements. While some caucus organizers emphasize each of these goals as they discuss the purpose of their work, most emphasize the majority of these points at various moments of time. In this section, I will review how educators in the UCORE network conceptualize the purpose of their work, drawing on my field work, document analysis, and oral history interviews with caucus educators. I will then discuss several explanations for the variations we see between caucus organizers' interpretations of the purpose of their work.

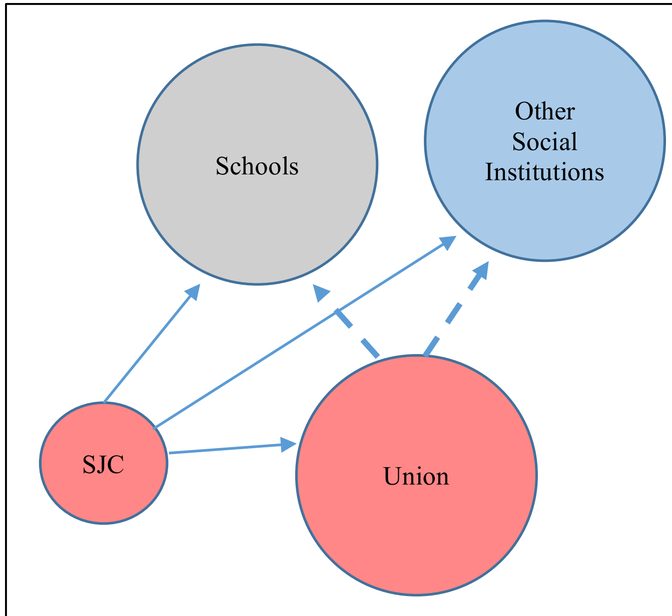

Figure 4.

Visualization of How Social Justice Caucuses (SJC) Transform Their Unions and Advance Justice in Schools and Society

Building rank-and-file power.

Caucus organizers frequently evoke the importance of building power. This can be seen in how caucus organizers frame the purpose of their work in mission statements,

newsletters, and other public scholarship. For example, in their mission statement, organizers in the Baltimore Movement of Rank-and-File Educators (BMORE) note that they "intend to amplify the power of the people through relationship building and providing educators the tools to organize their schools and communities" (BMORE, 2019). Similarly, organizers Educators for a Democratic Union (EDU) caucus in Massachusetts emphasize their focus on building power, offering a definition of union power that aligns with the conceptualization I have found throughout my research on UCORE caucuses: "We believe union power manifests primarily in the organizing activities of empowered rank-and-file members, not through lobbying elected officials. We share a vision for a future without power brokering in backroom deals—instead we envision solidarity with educators, students, families, and activists in our communities taking action to improve our public schools. EDU believes that the MTA is strongest when its members take collective action to solve problems in their workplaces and fight for justice for our schools and society. We want all MTA members to feel that they are the union, and to discover the power we have when we act together" (EDU). This definition aligns closely with the ways that educators in caucuses across the country discuss their efforts to build power in both public scholarship and interviews, which integrates ideas from post-structuralist (e.g. Foucault, 1975), critical (e.g. Apple, 1996), interpretive (e.g. Swidler, 1986), and critical constructivist (Kincheloe, 2005) traditions.

Organizers frequently articulate this vision for building power in public scholarship and presentations. In a newsletter piece published in May 2014, a WE member noted that the caucus had co-facilitated a workshop titled "From CHI to PHL: Lessons on Building Power, Unions, and Community." In this workshop, they

emphasized the need to engage in organizing conversations that not only build power but also directly grapple with racial justice. In a recent election, the Classroom Struggle caucus in Oakland centered the idea of building power in its electoral campaign, running on a slate titled "Build Our Power" (field notes, June 24, 2018), through which they won key union positions and led their local in a successful strike against austerity, privatization, and systemic racism in early 2019.

This focus can also be seen in how organizers frame their work in interviews and meetings, as caucus organizers discuss their focus on building power through rank-and-file organizing at both the local and the state levels. "Dan Trocolli," a key organizer in the Social Equity Educators caucus since its formation, notes that their work is centered on organizing the rank-and-file members of the union: "Rank-and-file activity is actually more important than anything else that you're doing inside the union. So, it's like we want members to be involved in actually shaping what they think is important" (personal communication, August 8, 2015). In a similar vein, Nicole McCormick, a leader in the West Virginia Public Employees United network and the West Virginia United caucus, emphasizes the role of their caucus in building members' own power from the ground up: "our focus is on the people, like we want the members to be active" (personal communication, April 16, 2019).

A leader in Massachusetts's Educators for a Democratic Union (EDU) caucus noted the caucus's role in building power at the local level, as well, arguing that her caucus has been able to "have organizing conversations and build power in their buildings" (field notes, August 4, 2017). A leader in Arizona Educators United similarly noted his organization's work to "build power" through "community collaborations"

(field notes, April 3, 2019). Likewise, while speaking on a panel focused on the movement for "the schools our students deserve," a California educator noted that he had shifted focus from organizing at the local level toward an effort to "build power throughout the state" (field notes, 2 April 2016). Similarly, while giving a virtual talk to encourage members at a WE general membership meeting, a leader from North Carolina's Organize 2020 caucus praised the WE caucus's efforts to "build power," saying "y'all are teaching us about what is possible" (field notes, January 27, 2016).

This focus on building power permeates every element of social justice caucus organizing, as I discuss further in Chapter 8. Whether engaging in one-on-one conversations, gathering educators together for a book group, presenting a resolution they know will likely lose at a union meeting, or organizing a protest against an unjust policy, caucus organizers see every moment as an opportunity to support the abilities of their fellow workers to effect change. Moreover, as caucus organizers recognize, the collective power of educators is the greatest defense they have against neoliberal and racist attacks on public education, as well as their greatest tool for democratically transforming their unions, schools, and communities for justice.

Democratically transforming educators' unions.

As I outlined in the beginning of this section, organizers in the UCORE network do frequently pursue the traditional caucus aim of transforming their unions. However, as previously discussed, they generally focus on using a democratic rank-and-file organizing strategy to enact this transformation, rather than relying primarily on lobbying or electoral politics. Moreover, they do so with the broader purpose of engaging in struggles that extend beyond the Representative Assembly or the bargaining team, hoping to

ultimately transform their schools and broader society. These goals are clear throughout the mission statements of both the UCORE network and its member caucuses, as well as in organizers' discussions of their work. They are also clear in the practices of caucuses, which I explore further in Chapters 8 and 9 and include grassroots organizing, political education, union resolutions, and electoral campaigns to move their union in a different direction. In the next section, I will review how educators in the UCORE network conceptualize the goal of democratically transforming their unions.

The goal of democratically transforming educators' unions is clear in most, but not all, caucus mission statements. In a mission statement announced in June of 2008, Chicago's Caucus of Rank-and-File Educators (CORE) emphasized the role of the caucus in transforming their union so that it better protects educators' labor rights: "We hope to transform our Union into an organization that actually fights for its members" (in Bradbury et al., 2014). The caucus's most recent mission statement emphasizes the role of the caucus in transforming the union in order to advance a broader social movement for labor and educational justice: "We [. . .] hope to improve the Chicago Teachers Union (CTU) so that it fights both on behalf of its members and on behalf of Chicago's students" (CORE, 2019).

In interviews, caucus organizers similarly alternate between emphasizing the role of their organization in transforming their union, highlighting the importance of the caucus in pushing their union in a different direction. Darrin Hoop, a member of the Steering Committee of the Social Equity Educators, notes that the caucus primarily focuses on moving their union toward a social justice unionism model, saying the caucus is able to "pull people of like mind who want to see their union move in a more

progressive, radical, social justice direction" (personal communication, February 21, 2019). A SEE founder likewise emphasized the importance of shifting the union toward a SJU model: "We started the group to try to bring social justice unionism in the union" (field notes, 4 February, 2018). Another SEE Steering Committee member notes their caucus's role in organizing rank-and-file educators in order to advance equity issues, saying the goal of the caucus is to "build the strongest possible union to fight against inequality [and] partner with social movements" (field notes, 26 July, 2017). UTLA Secretary and Union Power caucus leader Arlene Inouye similarly notes the role of her caucus in shifting the union from a "service to organizing model" through union elections (personal communication, August 7, 2015). Kristin Luebbert of the WE caucus likewise notes that she sees her caucus as pushing back against the PFT's "business model" (personal communication, March 1, 2019). Other educators note how this purpose informs the work of the UCORE network as a whole. Michelle Gunderson of CORE caucus, for example, argues that educators in the UCORE network are "threatening the status quo of unionism and business unionism [. . . by] asking them to change and to form more democratic unions" (personal communication, July 28, 2015).

As previously discussed, organizers in the UCORE network emphasize the importance of using democratic, rank-and-file organizing to transform their unions. For example, WE leader Kristin Luebbert emphasizes the caucus's role in transforming their union, schools, and broader communities from the bottom up. When asked how she conceptualized the caucus's work, she replied, "I would probably have said you know originally and still you know, social justice unionism, but what does that mean? And I think rank-and-file or bottom up is a huge part of that saying, you know, and this is also

true with building the coalition of other people, right. You know, bottom up and social justice go together because you are listening to everyone's concerns about their experience in their place, in their school, in their community, in their city, in their town" (personal communication, March 1, 2019). In this way, she highlights the deep connection between bottom-up educator and community organizing to principles of justice.

Beyond advocating for their unions to move in a different direction, caucus organizers often describe their purpose as showing members what this direction looks like by doing the work they think the union should be doing. CORE leader Debby Pope notes, "So that was a big thing for us: showing the union what we thought should be done" (personal communication, February 11, 2019). Another CORE leader, Jen Johnson, similarly notes: "the caucus was founded in order to do the work that we thought the union wasn't doing. So, help members, you know, connect better with community organizations, help schools that are fighting closing connect with one another, connect members with schools that are not closing to the schools that are under threat" (J. Johnson, personal communication, August 4, 2015).

By leading these fights, caucuses directly enact social justice unionist principles, rather than merely advocating for them within their locals. Moreover, by building rank-and-file power and potentially winning elected officer positions within their unions, caucus organizers are able to direct the material resources and membership of their union toward advancing equity in their schools and society.

Advancing justice in schools.

This focus on justice can be seen throughout caucus organizers' work, including their frequent invocation of the terms social justice caucus and social justice unionism. In Chapter 7, I discuss how caucus organizers draw on the principle of justice alongside the principles of care, democracy, and solidarity throughout their organizing. While each of these principles connects closely to the purpose of social justice caucus organizing, I have found that caucus organizers most frequently draw on the ethical principle of justice as they discuss the ways that they want to transform their schools and communities. Moreover, I have found that organizers often emphasize different forms of justice, particularly economic, educational, labor, and racial justice. In this section, I will explore how caucus organizers discuss the goal of advancing justice in their schools, whether through grassroots organizing, labor struggles, policy advocacy, or progressive pedagogies.

In their mission statements, caucuses often signal their emphasis on creating more equitable schools, in many cases highlighting the importance of racial equity. CORE's current mission emphasizes the caucus's role in directly engaging in struggles for educational justice: "We fight for equitable public education" (CORE, 2019). Similarly, in their mission statement, WE organizers state that the caucus "organizes with students, parents, and other working people to hold schools and government accountable for providing a quality education for all students." The UCORE network as a whole likewise cites the importance of justice in education, noting in its 2014 mission statement that members "call for equitable public education as a human right" as well as "creating schools and workplaces that advance economic justice, racial justice, and democracy."

As synthesized in the UCORE network mission statement, caucuses often emphasize the importance of racial equity in their discussions of educational justice. For example, organizers in WE and other caucuses have developed committees, campaigns, and statements that link educational and racial justice. The WE caucus has a Racial Justice Committee that supports the caucus's broader focus on centering race in their organizing for educational and social justice (field notes, 5 August 2017). The Social Equity Educators (SEE) caucus likewise emphasizes racial justice throughout its current mission statement, which I collaborated with organizers to revise in 2017-2018, including articulating a goal to combat "institutional racism" in schools by supporting "[a]nti-racist, anti-oppression pedagogy and practices" (Social Equity Educators, 2018).

Like the UCORE network mission statement, many caucus mission statements further link educational and racial justice to the labor rights of educators. A common framing used by caucus organizers is that "teachers' working conditions are students' learning conditions." The editors of *Rethinking Schools* (2012-2013), including several members of social justice caucuses and unions, identified this linkage as a key feature of the developing "new teachers' union movement" in the wake of the Chicago teachers' strike. In their mission statement, for example, MORE educators state that they "stand for a union that recognizes that teacher working conditions are student learning conditions" (MORE, 2012). Similarly, in discussing their campaign for a contract, WE educators in Philadelphia note that through their discussions of issues that unite parents, students, and teachers – such as low class sizes and potable water in schools – caucus organizers are showing that "our working conditions are your children's learning conditions," building alliances and linking different forms of social justice (field notes, June 25, 2017). The

UCORE 2014 mission statement similarly argues that "[w]orkplace justice and education justice are both vitally important and inexorably linked."

The principle of educational justice permeates almost every organizer's comments about the purpose of their work. In meetings and interviews, organizers emphasize the importance of both protecting public education from neoliberalism and advancing more socially and racially just school policies. SEE member Dan Trocolli notes that the caucus encourages members to directly engage with shaping education, "not only defending education against the corporate attack, but also expanding what education is" (personal communication, August 8, 2015). Likewise, Jen Johnson, a founding member of CORE, notes that when they formed the caucus "we believed that the union had an obligation to do better work to engage the broader membership in struggles for public education. You know first just stop school closings, but then beyond that to fight for public education on the whole" (J. Johnson, personal communication, August 4, 2015). For Johnson, this purpose is central to all caucus work: "I think the endgame is actually to protect public education and to, you know, speak to the greater needs of students and teachers. That is really the reason to form a caucus" (personal communication, August 4, 2015).

In this way, educators highlight their goals of advancing multiple forms of justice in schools, in many cases highlighting the links between educational and racial justice. These goals are often explicitly stated in caucus mission statements and were equally clear in my interviews and field work, both in the work of caucuses and their affiliated grassroots and educational networks.

Advancing justice in society.

While some caucus organizers primarily focus on advancing justice in their schools or unions, the vast majority of caucus organizers discuss their goals of advancing multiple forms of justice – particularly economic and racial justice – in their communities and broader society. In their founding mission statement, Philadelphia's Caucus of Working Educators (WE) emphasize their caucus's role in organizing educators alongside community members to defend students and communities or color: "WE are a social justice caucus that opposes institutional racism and organizes with students, parents, and other working people to hold schools and government accountable for providing a quality education for all students. We work to stop the attacks being waged on low-income students and communities of color, massive layoffs of school staff, and the punitive policies which push students into the school-to-prison pipeline." Seattle's SEE caucus likewise emphasizes the caucus's engagement in social movements against racism in its current mission statement: "SEE engages in local, national, and international social movements for liberation and radical change by building alliances and addressing the roots of institutional racism and other forms of injustice." This focus can be seen in the UCORE network's 2014 mission statement, as well, in which organizers note that members' "work extends beyond the classroom to include advocacy for economic and racial justice within our communities."

As these examples suggest, most caucus mission statements emphasize the importance of engaging in broader struggles for economic, racial, and social justice, in many cases organizing alongside students, parents, and community members within social movements. In interviews and meetings, caucus members connect their work for

justice to broader social movements. For Darrin Hoop, the SEE caucus has a set of "militant antiracist ideas" at its core, and he notes that he would like SEE and other caucuses "getting even more organized, thinking even bigger, thinking on a national and an international level, enacting priorities around like war and funding [. . .] Why don't we have healthcare? Why don't we have, you know, better education systems? Why don't we have better transit? Why don't we have more housing?" (personal communication, February 21, 2019). They also connect their work to the history of the labor movement. As Debby Pope of CORE notes, recent educator organizing "has really squarely placed teachers back in the Labor Movement where in some way" (personal communication, February 11, 2019). This connection to the labor movement is consciously evoked in the very names of many caucuses, including organizers' use of the words "rank-and-file" and, in the case of the Philadelphia caucus, "workers."

Synthesizing insights from caucuses across the country.

To understand the general purpose of caucus organizing, it is possible to synthesize each of the themes I have identified in my research to argue that most caucuses pursue the following common purpose: to build educators' power to democratically transform their unions and advance justice in schools and society from the bottom up. This purpose is nowhere clearer than in the mission statement of the UCORE network, which was democratically drafted in 2014 by representatives of some of the first social justice caucuses, synthesizing ideas from their respective organizing (M. Gunderson, personal communication, July 28, 2015). UCORE organizers use this statement to outline the network's core purpose and principles, offering a vision for organizing for the well-being of educators, students, and the communities in which they

live. In doing so, they provide a model mission statement for educators developing new caucuses across the country, integrating insights from more established groups and pointing toward a common purpose for social justice caucuses.

In this statement, UCORE organizers emphasize the ethical dimensions of their work as well as the ways that their goals extend beyond transforming their unions:

> We are social justice educators and unionists committed to creating schools and workplaces that advance economic justice, racial justice, and democracy. We call for equitable public education as a human right. We assert that the workplace rights of educators are an essential element of public education and that the well-being of communities in which our children live is as much a part of our mission as the work we do in schools.

Later in this statement, they go on to enumerate a list of ten "core principles" of organizers in the UCORE network. As I detail in later in this chapter and Chapter 7, this list – like the "principles" and "points of unity" of most member caucuses – aligns with four core ethical principles: care, democracy, justice, and solidarity.

Moreover, in the network's mission statement, organizers make clear that they hope to transform their unions, schools, and broader communities in accordance with these principles. In this mission statement, UCORE educators note that "[o]ur work as union members includes advocating and organizing for the above at the bargaining table, in our schools, and in our communities." This vision can be seen in the work of member caucuses across the country, who organize campaigns that connect democratic rank-and-file organizing with a vision for more equitable schools, unions, and society, overcoming

ideological divides between organizers emphasizing democracy, economic justice, labor rights, progressive pedagogy, or racial justice.

Realizing this purpose at the caucus and union levels.

As I detail further in Chapters 8 and 9, I have found that caucuses in the UCORE network do not merely articulate a vision for transforming their union, district, and community; instead, they use this vision to drive and evaluate their organizing. At the union level, this can be seen in such major struggles as the 2012 Chicago teachers' strike, which was led by members of the CORE caucus, and the 2019 Los Angeles teachers strike, which was led by members of the Union Power caucus. After winning leadership positions in their unions, CORE and Union Power caucus organizers used the institutional power of their unions to advance a vision for more equitable schools and communities.

At the caucus level, organizers in the Baltimore BMORE caucus and the Philadelphia WE caucus similarly advanced multiple forms of justice from the bottom up in their recent campaigns against "freezing" (Harvey, 2018) and "toxic" (WE, 2019), linking students' learning conditions with teachers' working conditions and emphasizing the fallout of racial capitalism. Likewise, the national Black Lives Matter at School Week of Action, led by caucus organizers across the country and building on the work of the SEE and WE caucuses, represents a successful campaign that links economic and racial justice, with such labor demands as hiring more Black educators and such pedagogical demands as requiring Black history and ethnic studies (Black Lives Matter at School, 2019).

Summary and Discussion

In this way, caucuses in the UCORE network lead campaigns that demonstrate multiple – and, in many cases, all – elements of the purpose identified in this chapter. They advance a common purpose that is unique in the history of educator unionism: building educators' power to democratically transform their unions from the ground up and advance justice in schools and broader society. By offering this argument, this chapter contributes to a range of research traditions, including examinations of educator activism, leadership, unionism, and engagement in social movements. Moreover, it contributes to two relatively new areas of scholarship: qualitative research on social justice caucuses and militant ethnographies of social movements. It also contributes to social justice caucus organizers' reflections on the purpose of their work, offering a potential tool for summarizing this work. Perhaps most significantly, it contributes to ongoing discussions of how educators, workers, and other community members can transform their material conditions and, in the words of a UCORE organizer from Massachusetts, "create a different world" (field notes, April 2, 2016).

CHAPTER 6: Explaining Variations in the Purpose of Social Justice Caucuses

What happens, when all of your energy is insurgence, like we exist in opposition to current leaders, and what happens when the caucus exists to strengthen the union and build working-class space? (C. Green, March 16, 2019)

We are the union. We are the union bosses. (N. McCormick, personal communication, April 16, 2019)

As I have argued, it is possible to identify a common purpose in social justice caucus organizing that integrates the insights of organizers leading this work across the country: building educators' collective power to democratically transform their unions and advance justice in schools and society. Nevertheless, as I suggested in Chapter 5, organizers emphasize different elements of this purpose at different times, and a number of tensions within this purpose emerge in studies of social justice caucuses on the ground. While I discuss those tensions more extensively in other work, I will briefly review them along with other explanations for why caucuses might emphasize one dimension of this purpose more than others in their work. As part of this discussion, I will propose a model for understanding the development of social justice caucuses over five phases.

Tensions between principles and ideologies.

As I reviewed in the previous chapter, social justice caucus educators often link each dimension of this purpose to the other. For example, they link educators' economic and labor rights to the well-being of students with the common framing that "educators' working conditions are students' learning conditions." They likewise link struggles for

economic justice to struggles for racial justice, pointing out the racist dimensions of austerity budgets and explaining that under-resourced schools disproportionately harm students of color. Moreover, they articulate a vision for union power that links rank-and-file and community organizing, arguing that, together, educators, students, parents, and other workers can collectively transform their material conditions.

Despite the shared commitment of caucus organizers, tensions sometimes emerge between organizers as they balance each dimension of their collective purpose. Given the hegemony of white supremacy in the United States and the disproportionately white demographics of the teaching force, it is unsurprising that a common tension in caucuses is between democracy and racial justice. This tension becomes especially striking when a caucus organizes its entire membership, independently or through their union, and must simultaneously represent all educators while remaining true to its social justice ideals. For example, during an extraordinarily intersectional one-day strike led by the Chicago Teachers Union, the Fight for $15, and leaders from the Black Lives Matter movement in 2016, CTU leaders in the CORE caucus faced a backlash after an invited speaker from the Black liberation organization Assata's Daughters ended an invited speech with chants against the police (field notes, April 1, 2016). While the strike was overwhelmingly supported by members, caucus and union leaders needed to negotiate whether to publicly affirm their community partner or the officers she condemned. These tensions can also emerge in bargaining, as organizers determine whether to set their bargaining model and demands based on the democratic input of members or in alignment with the priorities of organizers. In Seattle's SEE caucus, for example, organizers debated whether pursuing a democratic Bargaining for the Common Good model would support or undermine the

caucus's work for racial justice, given the disproportionately white demographics of the teaching staff and broader city (field notes, November 29, 2017).

Another significant and common tension in caucus organizing is between economic and racial justice, reflecting a divide on the left that philosopher Nancy Fraser (1995) aptly discusses as the tension between "redistribution" and "recognition." This divide is linked to the history of many caucuses, which often bring together educators with ideologies rooted in such varying traditions as social justice pedagogy, which emphasizes racial inequalities, and leftist "salting" (e.g. Forman, 2017) of the labor movement, which largely emphasizes class inequalities. In my research, I have found that many of the longest-running caucuses, such as Chicago's CORE, New York's MORE, Philadelphia's WE, and Seattle's SEE, have navigated this tension as a group to prevent or minimize fragmenting. Some caucuses engage in political education to ensure that members have a clear shared political analysis, for example.

Engaged scholar and caucus member Rhiannon Maton (2018) offers a thoughtful analysis of how the Caucus of Working Educators navigated this tension through an inquiry group, shifting their problem framing "from neoliberalism to structural racism." Other common tactics for navigating this tension include developing the caucus as a space for "decentered unities" (Apple, 2013), with organizers devoting their energies to campaigns that align with their ideological focus while supporting the campaigns of fellow organizers. For example, in Seattle's SEE caucus, organizers frequently meet in break-out groups both during and outside of caucus meetings, focusing on such efforts as organizing for a progressive capital gains tax to fund schools or for ethnic studies (field notes, February 23, 2019). In discussing tensions in the organizing of the EDU caucus in

Massachussetts, organizer Barbara Madeloni further cautioned against organizers being so focused on navigating tensions that they neglect their collective work, arguing that they could instead come to common understandings through the process of organizing: "Look, if we are doing the work, we'll figure out the differences; if we're spending most of our time talking about doing the work, our differences actually can sort of calcify and become like more significant" (B. Madeloni, personal communication, June 7, 2019). Organizers in these and other caucuses continue to engage in debates over the extent to which they should center their work on a single principle, such as racial justice, as well as the extent to which they should provide space for these debates in their caucuses.

Distinctions in political culture and context.

With caucuses developing throughout the United States in the past few years and especially since the "red state revolt" of 2018 (Blanc, 2019), we might expect that regional differences would explain the variation in caucus organizers' conceptions of the purpose of caucus organizing. Indeed, one of the striking differences between organizers' demands in the upsurge of 2018 and 2019 is their relative focus on economic and racial justice. While educators in both conservative and progressive regions developed demands that emphasized economic justice, only strikes in urban, left-leaning locals such as OEA (led in part by members of the Classroom Struggle caucus) and UTLA (led by the Union Power caucus) emphasized racial justice demands.

While these are significant differences, it is worth noting that the educators leading most local and statewide work stoppages advanced common good demands, ranging from fully funding education to protecting the health insurance of public workers to expanding Medicaid. Likewise, there were little differences between the demands of

statewide organizing in left-leaning states such as Oregon and right-leaning states such as Arizona, with educators in both states emphasizing the need for progressive taxation to fully fund schools. Furthermore, the majority of statewide strikes were led by emerging rank-and-file networks rather than social justice caucuses or unions, and organizers in states including West Virginia began to integrate racial justice into their organizing more upon forming a statewide caucus. So, while regional differences are evident, it is also worth interrogating the role that social movement organization (SMO) structures might play in shaping the purpose of educator organizing. I discuss that possibility later in this chapter.

When focusing on caucuses alone, it is possible to instead consider how the political culture of a given state might influence how educators conceptualize the purpose of their organizing. Political culture theory is relevant for considering the role that regional context might play on caucus organizing. In *American Federalism: A View from the States,* Elazar (1966) offers a controversial framework for identifying the political cultures of U.S. states. According to this framework, states in the Northeast and the Midwest have an "individualistic" political culture, favoring personal choices and competition; states in New England, the north Great Lakes region, and West Coast have a "moralistic" political culture, favoring civic engagement and eschewing corruption; and states in the Southeast and the Southwest have a "traditionalistic" political culture, favoring elite power structures.

This framework is arguably both Anglo- and Eurocentric, building on early American migration patterns without recognizing the influence of non-European immigrants, migrants, or indigenous communities. It might also be limited in its

application to the period when it was first proposed. Nevertheless, this framework does align with some basic trends around caucuses. Until 2018, social justice caucuses were only in states with what Elazar (1966) would identify as individualistic and moralistic political cultures, with the exception of the statewide Organize 2020 (O2020) caucus in North Carolina. And, while the O2020 caucus shares many similarities with both local and statewide caucuses across the UCORE network, it is possible that the caucus's comparatively strong emphasis on appropriating existing power structures such as the state union could be explained by the traditionalistic culture of the state (field notes, August 6, 2017). Likewise, the slight differences between West Coast caucuses, which have historically emphasized progressive pedagogies and social movement engagement, and many East Coast caucuses, which have historically emphasized confronting corruption in local unions and governments, could be linked to their respective political cultures.

CORE organizer Adam Heenan notes the variation between contexts, as well, while pointing to the struggles that unite educators across the country:

> "What does social justice unionism look like in the west and the northwest versus the southeast, you know and the north, you know and the great north? They really looked different, but there are similarities, the most obvious one is I'd say, the one that resonates most for the people who are teachers first, like their identity is teachers first, is the data mining of students and teachers in schools, because that's one that's most impactful for the classroom and the morale of people. And then next up are, you know, the workplace conditions, and then […] we are getting into

unionism and teacher voice, and not just compensation but also compliance." (personal communication, May 30, 2015).

As educators organize caucuses in new states and cities every year, it will be interesting to see which struggles unite organizers across the country and which are more context-dependent. This is a potential area for further research, with the caveat that more thorough comparative case studies of the political cultures surrounding caucuses like those offered by Brogan (2016) may be more fruitful than the generalizations encouraged by political culture theory.

Variations in relationship to educators' union.

The differences among caucuses' purposes can also be explained by their relationship to their local teachers' unions, including whether they have won elected leadership positions in that union. As previously argued, most social justice caucuses in the UCORE network pursue the traditional caucus aim of gaining union leadership, including both board and officer positions. They generally do so with the purpose of transforming their union in order to more effectively engage in struggles for justice in schools and society, however. Moreover, caucuses in the UCORE network generally run a slate of candidates for elected positions with the intention of maintaining their original caucus, arguing that the caucus will continue to serve an important role, even as the union takes on some of its goals. While caucuses have had great successes in furthering their vision upon winning elected leadership positions, this also presents new challenges which have the potential to alter the caucus's purpose.

Winning elected union positions can enable such victories as the teachers' strikes in Chicago and Los Angeles in the past decade. Organizers in these and other cities where

members of a social justice caucus won leadership positions face unique challenges, however. To begin with, caucuses can see a significant difference in their capacity if many key organizers take on union positions (D. Pope, personal communication, February 21, 2019.). Furthermore, if the elected leaders succeed in transforming their union toward an organizing, social justice model, caucus members with elected building representative positions may face considerably greater responsibilities for those positions than they had during previous administrations (G. Russom, personal communication, May 13, 2019). As the union adjusts towards a social justice model, there may also be a lack of clarity over the role of the union compared to the role of the caucus.

Based on their experiences after winning elected leadership positions in their unions, representatives from the CORE and Union Power caucuses have suggested a variety of ways that the caucus might relate to the union when both are pursuing a social justice unionism model. Some organizers note that the caucus can keep the union leadership connected to the rank and file (D. Pope, February 21, 2019) and true to its principles (T. Vinson, personal communication, July 1, 2019). Others suggest that a caucus can increase the organizing capacity of the broader union, as well as leading separate campaigns (field notes, August 5, 2017). Others suggest that the caucus is able to be "nimble" and respond quickly in a way that the institution of the union cannot (J. Johnson, personal communication, August 4, 2015; G. Russom, personal communication, May 13, 2019; J. Potter, personal communication, August 9, 2015). Likewise, given the occasional conflicts between democracy and social justice principles in this work, it is also possible that the caucus could take firmer social justice stands than would be possible for the union leadership (field notes, August 5, 2017). As newer caucuses such

as the Baltimore Movement of Rank-and-File Educators (BMORE) win leadership positions in their unions and navigate these challenges, organizers will have additional models and perspectives on the relationship between social justice caucuses and social justice unions.

Even when caucus organizers have not won elected leadership positions in their teachers union, their purpose and strategies may differ based on their relationship to the broader union and ability to effect change within that union. Based on my research so far, this seems to influence the caucus's strategies more than it influences the way that organizers conceptualize their work. This is an area for further research, as organizers continue to debate how their relationship toward their union should influence their work, as well as how their purpose and strategies might shift upon winning elected office.

Differences across phases of development.

A final way to explain the variation between caucus's purposes is based on their phase of development. Generally speaking, organizers in the UCORE network distinguish between new or "emerging" caucuses and more "established" caucuses, as well as emphasizing distinctions between caucuses that have won leadership positions and those that have not. These can be quite useful distinctions. As discussed above, caucuses face unique challenges after core members shift their focus toward running the union. Likewise, caucuses do change over time in notable ways, making it possible to track common changes such as the decision to develop a steering committee or lead multiple campaigns. As organizers also note, however, more established caucuses often have as much to learn from newer caucuses as newer caucuses have to learn from established ones. Likewise, as I have found in my study of the purpose and practices of caucuses in

the UCORE network, caucuses often develop in ways that are not linear, with some more established caucuses reevaluating their founding principles and some newer caucuses developing sophisticated union-wide organizing strategies, for example.

With this in mind, I would like to propose an alternative way of understanding the relationship between caucuses' purposes and their development. Rather than using a linear model to discuss caucus's development over time, I have found it useful to consider how caucuses move through five iterative phases of development: emerging, coalescing, broadening, institutionalizing, and fragmenting. While these phases were developed inductively based on my qualitative research and conversations with network organizers, they align closely with the stages of social movement development identified by Mauss (1975), and it is helpful to discuss these phases in dialogue with that literature. I've selected these terms to describe these five *phases* because they each suggest a different type of growth, and because they align with the social movement literature.

The first phase, emerging, suggests a caucus's focus on growing out of a specific context and set of challenges. This is likewise the same term that caucus organizers use to discuss proto- and new caucuses. The second phase, coalescing, suggests a caucus's focus on growing together, developing shared principles and leading political education and collective actions to build their "militant minority" or base. The third phase, broadening, suggests a caucus's focus on growing to build power across their entire union's membership, leading campaigns and actions that unite their membership. This third phase relates most closely to the model of organizing suggested by McAlevey (2016), while the second phase shares some similarities with her model of "mobilizing"

but is different in significant ways, among them my argument that this is a necessary phase for caucuses to engage in and return to over time. The fourth phase, institutionalizing, suggests that the caucus has grown in its capacity to effect change by winning significant leadership roles in the union (e.g. the majority of board and/or officer positions). The fifth phase, fragmenting, suggests that caucus organizers have grown apart in significant ways, with key organizers directing their energies toward other projects or caucuses.

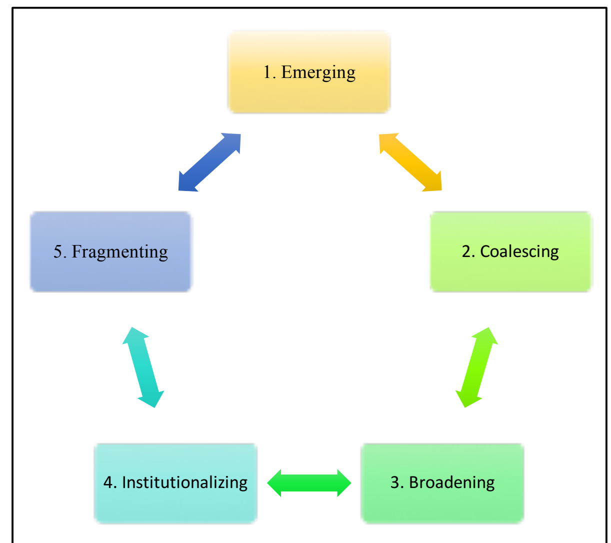

Figure 5.

Five Phases of Caucus Development.

These five phases are "ideal types" (Weber, 1949) that represent the spectrum of caucus organizing, with caucuses moving between the second and third phases in particular and, in many cases, integrating practices from several phases at once. It is important to note that these are not caucus types, and that even new caucuses may engage in some practices associated with all five phases of development. Likewise, while these phases are not intended to be exhaustive or universal, I have found that they are helpful for explaining much of the variation between caucus practices in my research with the UCORE network over the past four years, as explored in Chapter 8. They also can explain the way that some, but not all, caucuses shift in their stated purpose over time.

While this is an area to explore more extensively in future work, it is worth considering the ways that we can see these phases in the purpose of a single caucus. As a member of the Social Equity Educators caucus, I will take the caucus I am most deeply

engaged in as an example. When the SEE caucus first formed in 2009, it did so with the purpose of addressing a pressing issue in the Seattle context: the wave of school closures supported by the local educators' union, the Seattle Education Association (SEA) (field notes, 20 August 2018). With this challenge in mind, the caucus formed with a comparatively focused purpose of stopping the school closures and transforming the SEA, a purpose we might associate with the emerging phase of caucus development. Over time, SEE grew its base through a number of campaigns with a wide range of strategies and targets, ranging from boycotting standardized tests to protesting police brutality to implementing Ethnic Studies across the school district. The caucus therefore had a purpose – and in, particular, practices – that most closely relate to the coalescing phase of development. As the caucus has emphasized building power across their entire union's membership in the past few years, however, caucus organizers have at times enacted ideas and practices associated with the broadening phase of caucus development. Moreover, while the caucus has not succeeded in winning the top elected positions in the union, caucus members and allies have won several elected board positions in the Seattle Education Association, as well as passing a number of New Business Items that have shifted the culture of the broader union toward a greater focus on racial justice and democratic organizing. Some members have therefore engaged in institutionalizing the caucus's principles within the broader union. In some cases, organizers have shifted their focus away from the caucus itself and toward other projects, including official union roles and grassroots organizing in other groups, allowing for some fragmenting within the caucus.

In this way, caucus organizers have embraced purposes and practices associated with the coalescing and broadening phases at different times over the course of the past four years, with a stronger focus on developing structures to organize their entire base in the past year. There have also been less notable moments that align with the institutionalizing and fragmenting phases. As core caucus organizers have reflected in both meetings and interviews, the caucus will have to shift toward an even greater focus on organizing the entire union membership if it is to succeed in fully transforming the SEA and institutionalizing the caucus's mission. This reflection does not negate the transformation the caucus has already led through its work over the course of the past decade, however, including organizing with community members to successfully stop five school closures in its first year, leading national movements to boycott standardized tests and affirm Black students, and moving the union toward a more progressive culture and policies while only holding a few executive board seats. Moreover, as members of SEE note, the caucus has more work to do to grow a multiracial, women- and people of color-led base that reflects its principles and purpose as a caucus. I would therefore argue that it is valuable for the caucus to continue embracing practices associated with both the coalescing and broadening phases of development.

In the caucus's work within the Seattle Education Association and successful board campaigns and New Business Items, it is also possible to see some examples of institutionalizing practices. However, this institutionalization is not as significant as in caucuses that have won the top elected leadership positions in their union. Likewise, in the occasional rifts within the caucus and organizers' shifts toward focusing on other projects, there are also practices associated with the fragmenting phases. However, as the

caucus continues to meet regularly and new organizers have taken on roles associated with departing ones, the caucus's practices can be connected most closely to the coalescing and broadening phases.

Even though the development of the caucus's purpose and practices over time can in part be explained by this framework, it is worth noting that the other frameworks I have discussed are useful, as well. Organizers within the caucus bring a range of ideological perspectives, including varying levels of focus on economic justice, labor rights, progressive pedagogies, and racial justice. Likewise, the political context and culture of Seattle no doubt inform the caucus's purpose, with members bringing a range of civic experiences that include participation in Occupy Seattle and other social movements, writing for progressive education publications such as Rethinking Schools, leading in racial justice organizations such as the SEA's Center for Race and Equity, and presenting in education conferences such as the Northwest Teachers for Social Justice. Moreover, the relationship between the SEE caucus and its union, the SEA, has informed the caucus's organizing over time, with the caucus's ability to shift the culture of the broader union and occasionally collaborate with union leadership minimizing the caucus's emphasis on union electoral politics. With this in mind, each of these dimensions represents a promising area for future comparative research on the purpose and practices of social justice caucuses.

Summary and Discussion

In my discussion of the variation in how caucus organizers articulate the purpose of their work over time, I have advanced four possibilities for future research: ideological tensions between caucus principles, differences in the political culture and context of

caucuses, distinctions in the relationship between caucuses and their associated unions, and the development of caucuses over multiple phases. In proposing this fourth possibility, I have advanced a framework for understanding caucus development that connects with research in both the labor studies and social movement traditions and includes five phases: emerging, coalescing, broadening, institutionalizing, and fragmenting.

Chapter 7: Ethical Principles and Social Justice Caucuses

> *Because the threat of privatization was coming at us so forcefully at the same time as the Chicago strike was happening, it was clear that if we also want to make an argument to the community about why they need to support public schools and teachers' unions, it has to be on the basis of a visionary and proactive program.* (G. Russom, personal communication, May 12, 2019)

> *I think one of the things is when you do, do a racial justice, a social justice lens, I think it's important that you check the pulse of who that lens affects the most, right, especially if it's a predominantly white space. You need to check the pulse of the few people in the space that are of color to see if you are heading in the right direction. Not to check in for them to tell you what to do, but to check in and make sure you are being mindful of the language and things like that right? So that – I mean because that's also going to make people – bring people into the fold.* (T. Anderson, personal communication, June 3, 2019)

Educators' unions have long focused on advancing ethical principles. Outside of the examples discussed in Chapter 2, such as New York's Teachers Union and Black educators' associations in the pre-*Brown* South, these unions have predominantly focused on supporting justice by advocating for the labor rights for educators. Over the past decade, however, unions have increasingly focused on broader social justice issues, ranging from integrating multicultural texts in the classroom to interrogating the impact of school closures on communities of color to working with community organizers to address local inequalities. Scholars have theorized these changes in a number of ways, proposing models that include social justice unionism (NCEA, 1994) and social movement unionism (Weiner, 2012). Scholars of educator unionism have documented what these models look like on the ground using qualitative methods (Maton, 2016; Maton, 2018; Stark & Maton, 2019). Likewise, researchers have highlighted the ethical

dimensions of teaching (Beane & Apple, 2007; Boler, 2004; Dewey, 1944; Hytten & Bettez, 2011; Kumashiro, 2009; Noddings, 2002; Strike & Soltis, 2009; Valenzuela, 1999), teacher activism (Ayers, Quinn, & Stovall, 2009; Hytten, 2015; Santoro, 2011), and teacher unionism (Weiner, 2012; Weiner, 2014). Still others have understood organizing as an example of learning (Hall & Clover, 2005; Taylor, 2001), knowledge production (Foley, 1999; Conway, 2005; Cox, 2014), and cognitive processes (Eyerman & Jamison, 1991) within social movements. There exist very few studies that trace the ethical dimensions of teacher organizing from the ground up, however, bringing teachers' own frameworks for theorizing educational justice into dialogue with major theories in these traditions.

In this chapter, I trace the ethical dimensions of educator organizing within social justice caucuses in the UCORE network, exploring how organizers use ethical frameworks throughout their work. Using the methodology of militant ethnography, this chapter traces cultural processes throughout the network, focusing particularly on the ways organizers use ethical principles throughout their work. It finds that teacher organizers draw on the following ethical frameworks throughout their work: care, democracy, justice, and solidarity. Moreover, it finds that organizers in the UCORE network use these principles to frame, guide, and evaluate their work. In highlighting the ways that teachers define and support these virtues in their organizing work, this chapter brings teachers' voices into dialogue with major frameworks in the philosophy of education, critical policy studies, educational studies, and social movement studies. This study builds on these traditions by highlighting the voices and perspectives of teachers organizing for social justice within and through teachers' unions. It further contributes to

these traditions through its consideration of how teachers conceptualize the ethical dimensions of their own work, and how teachers operationalize these ethical frameworks within their organizing.

Findings

In the research detailed in this chapter, I have found that social justice caucus organizers draw on a range of ethical principles throughout their work. In particular, I have found that educator organizers use the following ethical principles to frame, guide, and evaluate their work: care, democracy, justice, and solidarity. Educator organizers offer a complex range of definitions for these principles, in some cases actively using them to challenge ideas in labor studies and the philosophy of education.

Care.

Philosopher Nel Noddings (1984) distinguishes between two types of care: "caring-for" people who you are close to and "caring-about" abstract ideas, issues, and people you do not know. For Noddings, "caring-for" is closely tied to a process she calls "engrossment," through which individuals are able to "see and feel with the other" (p. 30). As Weiner (2012) notes, education is a caring profession, and this care informs union organizers' work. Similarly, in my own research I have found that both forms of care are central to how many social justice caucus organizers frame and conceptualize their own work. Moreover, I have found that organizers draw on the principle of care to guide and evaluate their work, as well.

In my fieldwork and interviews, caucus organizers frequently evoke the principle of care when they discuss their profession, discussing how they both care for and about their students. In general terms, organizers frequently argue that they are educators

primarily because they care about children. As a UCORE organizer from Portland noted at the biannual Labor Notes conference in 2016, “We got into this work in the first place because we really care about children and we want to make a difference in their lives” (field notes, April 2, 2016). Similarly, in an interview, Michelle Gunderson of the CORE caucus in Chicago noted that “teachers care deeply about children and community” (personal communication, July 28, 2015.) Organizers likewise discuss how they care for the students they have taught, highlighting the importance of relationships. For Tracy Castro Gill of the SEE caucus in Seattle, the most notable experiences of her career as an educator have been the “relationship moments” of connecting individually with a student (personal communication, February 13, 2019). Darrin Hoop of the SEE caucus likewise cites “caring” as central to his experiences as an educator, highlighting the importance of ensuring that students know “that there is someone who cares about them” (personal communication, February 21, 2019).

This ethical principle has also been used to frame teacher organizing in caucuses across the country. In many cases, organizers connect their care for students to the need for social justice caucus organizing. In interviews, organizers in the CORE, SEE, and WE caucuses argued that educators should organize for equity because they care for their students. For Michelle Gunderson of CORE, it is important that caucus organizers work with new teachers to “foster that deep care and help show them that unionism is a way that we can provide equitable schooling” (personal communication, July 28, 2015). SEE’s Darrin Hoop similarly argued that educators join the profession because they “love to teach because they love the students” but that “that alone is not enough.” Rather than just effecting change from within the classroom, he argues that educators should “become

activists in the community, in their union, and do stuff outside the classroom" (personal communication, February 21, 2019). Kristin Luebbert of the WE caucus similarly argues that educators' care for their students in the context of an unequal school system and society is radicalizing for many educators, who say, "I can't allow this to continue. This is unfair. I see it every day, its infuriating me. And I can quit and just stop doing this, or I can fight for what I know is right for our kids and our schools" (personal communication, March 1, 2019).

In campaigns, caucus organizers draw on the principle of care to further frame their work, linking educators' care for and about students to their fights for equitable contracts and fair funding. For example, educators evoke the principle of care implicitly in the Schools Our Students Deserve campaigns that have been developed in teachers' unions and social justice caucuses in cities that include Chicago, Los Angeles, Portland, and St. Paul (field notes, April 2, 2016). This principle has also been used to frame contract demands in several cities, with organizers in cities that include Chicago and New York using the popular phrase "Our teachers' working conditions are our learning conditions" to link labor justice to care (field notes, April 2, 2016). Within an action organized by an educator in the Philadelphia-based WE caucus, an organizer similarly highlighted their care for students in opposition to the district and city's austerity measures, protesting a district's actions with a sign that read "We won't eat while our kids starve." In discussing this action, the organizer explicitly linked it to a need to emphasize care alongside social justice in the caucus's communications, saying that organizers "got it out to the public how much we care about our kids and what's been going on" (field notes, August 5, 2016).

Within my research on the UCORE network, I have also noted that caucus organizers use the principle of care to guide their work, although to a lesser extent than other principles. At a monthly meeting of the WE caucus in Philadelphia, an organizer reflected on caucus work, noting, "this is for our children" (field notes, January 27, 2016). As Michelle Gunderson of CORE further notes, social justice caucuses organizers can use care to guide their union's contract negotiations, using their unions as a vehicle to "fight for kids, not just bread and butter issues" (personal communication, July 28, 2015).

Educators within the UCORE network also use the ethical principle of care to evaluate their work. At a national meeting of the Network for Public Education, a CORE organizer noted, "I always say, if there comes a day in my teaching profession, where I say, 'I'm not going to stand up for my kids,' that's the day I pack up my bags and leave the teaching profession" (field notes, April 25, 2015). For this teacher, acting on the ethical principle of care for her students was central to both her teaching and her activism. Barbara Madeloni, Education Coordinator for Labor Notes and a key organizer in the EDU caucus in Massachusetts, similarly notes that care for the state's most marginalized students is central to how organizers guide and evaluate the caucus's work. For her, the way that campaigns are framed – whether focusing on economic or racial justice, for example – is less important than their impact. With this in mind, she encourages organizers to ask, "What are you doing that made a difference in the lives of students of color?" (personal communication, June 18, 2019).

While the ethical principle of care is often used to frame, guide, and evaluate the work of caucus organizers, it is important to note that this ethical principle is sometimes seen as a liability within teacher unionism. For a UCORE organizer who is the head of

her union, "we care about kids and they know it" (field notes, April 2, 2016). Likewise, a member of the WE caucus noted that the principle of care is sometimes used as a threat to challenge educators' organizing for labor and social justice (personal communication, June 21, 2016).

Democracy.

In *Education and Democracy*, philosopher John Dewey (1944) argues that education is central to the creation of a flourishing pluralist democracy, in that citizens have the opportunity to experience the habits associated with democratic practice through their experience in schools. Educational philosopher Kathy Hytten (2016) builds on Dewey's work to argue that contemporary social movements offer "spaces for democratic renewal where people can come together to learn and practice some of the most important habits of democratic citizenship, such as communication, cooperation, dialogue, experimentation, inquiry, empathy, solidarity, open-mindedness, and collective action" (p. 982). Extrapolating from *Democracy and Education*, Hytten further argues that "communities are democratic when they bring out the good in all of us, allow us to grow, and compel us to want others around us to grow as well" (p. 984).

In alignment with Hytten's work, I have found that social justice caucus organizers practice democracy throughout their work in contemporary educator movements. Caucus organizers frequently discuss the importance of democracy within their caucus as well as their unions. Moreover, they often discuss the need to create spaces where educators can directly experience democracy, in order to better understand the need to advocate for democratic practices within their schools, unions, and

communities. In particular, I have found that they use the democratic principle of democracy to frame, guide, and evaluate their organizing.

The ethical principle of democracy is used more frequently within the caucus organizing I have engaged in as a participant-observer. In the SEE caucus, this principle is actively discussed within caucus meetings and in informal conversations between organizers, both to reflect on the practices of the caucus itself and in discussions of engagement with the union and school district as a whole. Likewise, democracy is frequently discussed within the national UCORE network in relation to both the member caucuses and unions and the work of the network.

The ethical principle of democracy is a central principle in framing caucus organizing, both in the mission statements and public speech of social justice caucus organizers. As discussed in Chapter 5, democracy is one of the core ethical principles outlined in UCORE's mission statement: "We are social justice educators and unionists committed to creating schools and workplaces that advance economic justice, racial justice, and democracy." UCORE organizers attending the annual convention likewise note that they are "representing a larger group of people" and they "operate as equals under a variety of experiences and contexts" (field notes, August 9, 2015). For UCORE organizers, new caucus members are "given equal ground with somebody who is the president of a large union" (field notes, August 9, 2015).

Democracy has furthermore been extensively used to guide the organizing work of social justice caucuses. In discussing her work in the Educators for a Democratic Union (EDU) caucus in Massachusetts, Barbara Madeloni noted that organizers constantly ask themselves, "how can we be more democratic, and how can we bring more

people in?” (personal communication, June 7, 2019). At the 2016 annual national meeting of the Labor Notes network, an organizer who has been integral to the formation of UCORE highlighted the importance of democracy to social justice unionism. She noted, “There’s only one way to do it. It’s got to be inclusive. It’s got to be democratic” (field notes, April 2, 2016). At the 2016 annual meeting of the UCORE network, a Chicago-based organizer similarly noted that democracy is “the way we operate inside our steering. We do not want to replicate structures of oppression. It’s very mindful in what we do” (field notes, August 9, 2016). In this way, she links the horizontal and democratic structure of organizing within the network to principles of equity and justice.

Democracy is also widely used to evaluate the degree to which caucus organizers are living up to their own principles. In interviews, several caucus organizers reflected on the use of democratic practices in their caucus. In discussing the structure of their caucus, for example, “Matthew Cleary,” a member of Seattle’s SEE caucus noted, “Everyone has a voice, it’s very democratic” (personal communication, September 14, 2015). Other organizers note that there are frequent discussions about how best to support democracy within their organization. At the annual UCORE convention in 2016, a member of the MORE caucus in New York discussed the tension between the hesitation to create formal structures because it might hinder democracy and the need for systems that work so that you aren’t reinventing the wheel every time (field notes, August 5, 2016). Madeloni similarly discussed this tension in her reflections on the work of the EDU caucus (B. Madeloni, personal communication, June 7, 2019). Likewise, at the annual convention of the CORE caucus in Chicago in 2015, caucus attendees challenged the democracy of the

convention discussions, and a vibrant debate of the caucus's debate and membership structures ensued (field notes, September 25, 2015).

Justice.

In her study of social justice activism in Canadian teachers' unions, Cindy Rottmann (2008) offers a useful framework for identifying four different conceptualizations of social justice within teachers' unions: liberal distribution, critical distribution, liberal recognition, and critical recognition. For Rottmann, the Rawlsian concept of liberal distribution emphasizes the role of rational laws in minimizing inequalities. Conversely, the Marxist concept of critical distribution highlights the need to eliminate inequalities by developing new social structures. While these first two conceptualizations of justice focus on the distribution of resources, the latter two focus on "identity and status" (Rottmann, 2008, p. 970). The concept of liberal recognition emphasizes moving toward equality through educational practices that affirm diversity as well as social practices that achieve greater representation of marginalized communities within positions of power. Conversely, the concept of critical recognition emphasizes using more contentious methods to achieve the same goals, including social protest.

Rottmann's framework is a useful one for understanding the range of ways in which social justice is conceptualized within social justice caucuses. The majority of social justice caucus organizers evoke forms of justice that most closely resemble Rottman's concepts of critical distribution and critical recognition, as well as related principles of economic and racial justice. Organizers frequently evoke critical distribution and recognition conceptualizations of justice to frame and conceptualize their work, most often emphasizing economic and racial justice. In the context of the current presidential

administration, I have also noted an increasing number of references to gender and immigrant justice.

In my analysis of this principle, I have noted that the terms "justice" and "social justice" are most frequently used to frame the centrality of economic and racial justice to caucus organizing. As a CORE organizer noted in an, personal communication, social justice unionism can be understood as "taking a stance [that is], anti-racist, anti-paternalist, [and] anti-colonialist" (personal communication, May 30, 2015). Organizers within Philadelphia's WE caucus have similarly emphasized that racial justice must be considered as a central ethical principle within caucus work. As one WE organizer noted at the 2016 UCORE convention, "we would argue that it's impossible to have real social justice in this society without addressing racism" (field notes, August 5, 2016). Another WE organizer noted that their caucus has begun "looking at […] issues through a racial justice lens and framing [their] message through that" (field notes, April 2, 2016). This has remained a major focus for the caucus since that time. Caucus organizers have also emphasized economic justice throughout their work, critiquing models of privatization and neoliberalism, as well as calling for economic justice in the labor contracts of teachers.

The principle of justice has also been widely used to guide caucus work. UCORE organizers credit theorists such as Freire and the editors of Rethinking Schools for supporting their formation as social justice educators, as well as organizers and scholars such as Bob Peterson and Lois Weiner for shaping their understandings of social justice unionism (field notes, August 9, 2015). Likewise, caucus organizers discuss the centrality of justice to work within their caucuses. A discussed in Chapter 5, for Matthew Cleary,

an organizer in Seattle's Social Equity Educators caucus, the role of the caucus is to "push new, progressive ideas" within the broader union, including ideas around social justice and "racial equity for students" (personal communication, September 14, 2015). For this organizer, the 2015 Seattle teachers' strike served as an example for this role, as the SEE caucus had advocated for the strike demand of racial equity teams in every school (personal communication, September 14, 2015). Racial justice can also be seen as a central principle to organizing within SEE in Seattle, which planned a citywide Black Lives Matter at Schools action for October 19th this year as well as a book group on From Black Lives Matter to Black Liberation (field notes, September 18, 2016).

Justice is also a guiding principle in the structure of caucus organizing. As a CORE organizer noted at the UCORE convention, "We are very intentional in not replicating the oppressive structures we are under" (field notes, August 9, 2015). In an interview, key CORE organizer Michelle Gunderson further noted that they are "very mindful of race and gender dynamics" in both the caucus and the network as a whole (personal communication, August 4, 2015). This does not mean that caucuses are always successful at resisting these structures, however. At the annual meeting of United Opt Out, for example, a CORE organizer noted that CORE is "actually having really difficult discussions about race and class" (field notes, February 28, 2016).

Justice has also been used to evaluate the extent to which caucus organizing achieves its own principles. At the UCORE convention in 2016, UCORE organizers reviewed the UCORE missions statement, eliciting feedback and comments from organizers across the country. In discussing this statement, an organizer from CORE noted, "I think as our work has progressed in the past five years we've realized that racial

justice is at the forefront of what we're doing" (field notes, August 5, 2016). Another organizer asked whether other "axes of power" were being recognized in addition to "economic and racial" justice (field notes, August 5, 2016). An organizer from Organize 2020 in North Carolina concurred, noting that the "only thing missing" is a note on "gender justice," which for this organizer is important because "a lot of the attacks on public ed are gendered" (field notes, August 5, 2016). Responding to this reflection, UCORE organizers developed an electronic group to begin investigating intersectional considerations of gender and race in social justice caucus organizing.

Throughout caucus organizing, the principle of justice is therefore used to frame, guide, and evaluate organizers' work. In their focus on using critique, mobilizations, and protest to advance economic and racial justice, the majority of caucus organizers draw on critical conceptualizations of justice through distribution and recognition. As explored briefly in the previous chapter, tensions sometimes emerge between organizers promoting differing – although generally critical – conceptualizations of justice. Other conflicts emerge in caucuses as they navigate both critical and liberal models of justice, which is an area for further research.

Solidarity

For Emile Durkheim, education instills a set of shared values in members of a society that allow them to function together, which in turn promotes a sense of social cohesion or solidarity. In *The Division of Labor in Society*, Durkheim (1900) identifies two forms of solidarity: mechanical solidarity, which is shared among all members of society regardless of class or occupation, and organic solidarity, which is shared among members of the same class or occupation. Based on this framework, Durkheim argues

that more complex, industrialized societies foster organic solidarity rather than mechanical solidarity.

Durkheim's conceptualizations of solidarity are useful in considering the links between educators in social justice caucuses, as well as the labor movement and contemporary educator movements. The move toward professionalization in teachers' unions in the twentieth century could be seen as the development of organic solidarity among members of a relatively new, upwardly mobile profession. This form of solidarity continues today and is arguably an important feature of caucus organizing, as organizers develop strong relationships with their peers across the country and support each other's struggles. Organizers in social justice caucuses also expressly push back against the limitations of this form of solidarity, however, emphasizing their connections to other workers and members of their community. The Philadelphia caucus highlights their connection to the working class through the name Caucus of Working Educators, for example. Likewise, in framing themselves as West Virginia Public Employees United, the organizers who would go on to form the West Virginia United caucus were emphasizing their connections to other public workers outside of their profession. Moreover, the focus on the term "educator" rather than "teacher" among social justice caucus organizers could be seen as a shift from organic to mechanical solidarity. Many caucus organizers' support of social movements for immigrant rights, LGBTQ rights, and racial justice can be seen as a form of organic solidarity, as well, in that they are often expressing connections to community members outside their own occupation.

It could therefore be argued that social justice caucus organizers draw on both the principles of mechanical and organic solidarity throughout their work. As I discuss

further in Chapters 8 and 9, solidarity is a foundational virtue within social justice caucuses and the UCORE network, especially as it relates to the cultural practices I discuss as “linking struggles.” Caucus organizers likewise evoke the concept of solidarity in discussing the purpose of the UCORE network, conceptualizing UCORE as a “network of solidarity” directly responding to neoliberal policy networks and systems of oppression. With this in mind, I discuss the centrality of solidarity to organizers’ work.

While it is the last of the four principles that I have identified as central to teacher organizing in the UCORE network, the ethical principle of solidarity is deeply integrated in organizers’ conceptualizations of their own work, with many organizers using the concept of solidarity to frame the purpose of their engagement in UCORE or other networks. As an organizer from the New York MORE caucus noted at last year’s Labor Notes conference, “At the base of unionism […] is solidarity” (field notes, April 2, 2016). This principle is evident in both the discourse and cultural practices of the UCORE caucuses and the network as a whole. At each of the UCORE conferences in the past two years, caucus organizers from across the country have sung booming refrains of “Solidarity Forever. For the union makes us strong.” In framing their work, a CORE organizer accordingly describes the UCORE network by saying, “we’re a network of solidarity and helping one another” (field notes, August 9, 2015). This definition highlights the relational dimensions of organizing, which a Philadelphia WE organizer describes as a “slow process of building relationships, following through on commitments, and helping people out in a pinch” (personal communication, May 28, 2016).

This principle is further used to guide caucus organizing, with organizers noting the importance of solidarity both across the UCORE network and between caucus organizers and allied community and labor groups. Organizers in caucuses across the country similarly note the cultural processes they engage in to build solidarity, which include wearing the same t-shirts and pins and taking solidarity photos. For one UCORE organizer from Oregon, these actions are ways of “showing power” (field notes, April 2, 2016). Organizers also engage in organizing that they expressly consider “solidarity work.” In the SEE caucus, organizers have engaged in this work, which I discuss as “linking struggles” in Chapter 8, in a number of ways. Some caucus organizers have focused on developing close relationships with parents and community members leading struggles for educational justice, such as the fights for ethnic studies and against standardized testing. Others have worked with community organizers to support social movements for social justice, including struggles against immigrant detention and police brutality. Others have engaged in organizing to support education workers in other contexts, such as the teachers leading the red state strikes in 2018 and 2019. In this way, SEE organizers have drawn on both mechanical and organic solidarity to guide their work, in many cases making public statements expressing solidarity with their students, neighbors, or fellow educators.

In evaluating their network’s work, organizers also frequently evoke the principle of solidarity, including concepts of both mechanical and organic solidarity. A North Carolina organizer noted solidarity within the network, saying, “we’re here as equals, coming from a variety of perspectives, but under – in a common struggle, and under a common attack, and I’ve never seen and been a part of something that is so big but that

still is so horizontally organized and so democratic and feel such instant kinship and love for so many people, in the room, that I respect so much, in the work that is going on across the country" (field notes, August 9, 2015). While this statement of solidarity emphasized connections between fellow educators, and thus could be understood as organic solidarity, other organizers emphasize mechanical solidarity in their reflections on the network's work. A CORE organizer at the 2015 convention of UCORE noted the solidarity between teachers and other workers, for example, saying "teachers are not just teachers with education issues, but that they're also part of a working class and part of a labor movement, and that there are many things that teachers have in common, for example, with nurses, about voice and patient care and things like that" (field notes, August 9, 2015).

Organizers in the UCORE network therefore evoke the principle of justice to frame, guide, and evaluate their work. They likewise draw on both mechanical and organic forms of solidarity, showing solidarity to their fellow educators as well as other workers and community members. In doing so, social justice caucus organizers push back against the trend toward professionalization in educators' unions, as well as trends toward individualism in neoliberal education reform.

Summary and Discussion

In this chapter, I have discussed the four ethical principles that caucus organizers use most frequently in their work: care, democracy, justice, and solidarity. I have further discussed how organizers use these principles to frame, guide, and evaluate their work. In discussing each principle, I have explored how this principle is conceptualized and used

in caucus organizing in relation to major frameworks in the fields of educational studies, the philosophy of education, and sociology.

By exploring the ethical dimensions of teacher organizing within a national network of social justice caucuses, this chapter contributes to critical policy studies, labor studies, and the philosophy of education. Moreover, it contributes to this dissertation's discussion of the connection between knowledge and action in education, highlighting the ethical philosophies of educator activists contributing to the fight for justice in education and society as a whole. In the next chapters of this dissertation, I will explore the cultural practices of social justice caucuses in the UCORE network, which further demonstrate how organizers within social justice caucuses enact these principles throughout their work.

PART THREE:

CULTURAL PRACTICES AND POLICY MOBILITY IN THE UCORE NETWORK

CHAPTER 8: The Cultural Practices of Social Justice Caucus Organizing

> *They were very business model, and we really were pushing against that. And for a couple of years we had monthly meetings [to] sort of you know delineate our concerns. They listened to us but nothing ever changed. So, we finally decided, "listen, we're going to have to form a caucus*." (K. Luebbert, personal communication, March 1, 2019)

> *And now the strategic plan is saying, "We will unapologetically serve students of color," and then you have principals saying, "Racial justice isn't part of my work," and nothing happens. So, we need to figure out, if we are going to push our vision of racial justice and racial equity, we need to figure out how to either get them on board with it, and that seems almost impossible, or organize enough that they get out of the way.* (T. Castro Gill, personal communication, February 13, 2019)

When I began this project, as an educator who had organized against the fifteen standardized tests required for graduation in Texas schools, I was fascinated by such successes as the 2012 CTU strike, led by the CORE caucus, and the 2013 MAP boycott, led by the SEE caucus. The question I kept asking myself was, *how did they do that?* And, while countless other questions have emerged through my research within UCORE, this core question remains. In fact, it only gained more relevance as I began engaging in militant ethnographic research as a member of Seattle's Social Equity Educators (SEE) caucus in 2016.

Since then, educators have continued making gains that go far beyond their own compensation, winning charter school moratoriums, mental health support for students, district-wide ethnic studies programs, progressive corporate taxation, and dramatic increases in school funding. As educators throughout the country argue, they are fighting

for the schools – and communities – that their students deserve. And, one rally or strike at a time, they are winning their demands as well as expanding the public's perception of what is possible. Together, these strikes, campaigns, and job actions show that educators can change schools and society through their organizing outside of the classroom. More specifically, they show that educators can use collective bargaining and organizing to advance economic, labor, racial, and social justice in their schools, unions, and communities. With this recent history in mind, I have found it important to keep asking that same question – *how did they do that*? – from the positionality of both a researcher and an organizer. To return to the framework explored in Chapter 3 of this question, it is not a question of whether but of *how* educators can change society.

With this in mind, Part Three of my dissertation focuses on the cultural practices of educators organizing for justice in contemporary educator movements across the United States. In this chapter, I will focus my attention on the work of educators in social justice caucuses, which can broadly be understood as groups of educators who are committed to advancing democracy and equity in their unions, schools, and broader society from the bottom up, as I argue in Chapter 5. In my exploration of the cultural practices of social justice caucus organizers, I will discuss organizers' work in dialogue with research on educational change, social justice unionism and, particularly, social movements.

Conceptual Framework

Within these literatures, scholars of critical policy studies and critical pedagogy have discussed to what extent and how educators can advance positive change in both schools and society (Apple, 2013; Counts, 1932; Freire, 1970; hooks, 1994; Santoro,

2011). Scholars of labor studies have likewise discussed the potential for teachers' unions and caucuses to support this change, offering analyses and case studies illustrating this possibility (Maton, 2016b; Stern & Brown, 2016; Weiner, 2012). Likewise, scholars using the analytic tools of anthropology and sociology have discussed the cultural processes through which organizers advance this change (Polletta 1998b; Polletta & Jasper, 2001), in some cases using engaged methodologies to offer micropolitical analyses of this work (Graeber, 2009; Juris, 2008; Maeckelbergh, 2009). Nevertheless, few scholars detail the specific processes, strategies, and tactics that characterize the work of social justice caucuses in the United States. Likewise, there is little research considering contemporary educator organizing in dialogue with the literature on social movement organizations. With these gaps in mind, I will discuss the cultural practices of educator organizers active in UCORE, a national network of social justice caucuses connected to teachers' unions. Through my analysis of data collected over the course of a four-year militant ethnographic study alongside members of the UCORE network, I highlight the cultural practices of social justice caucus organizers on both the national and local levels. In particular, I explore the common practices that caucus organizers use to build the power necessary to transform their unions, schools, and broader communities from the ground up. In discussing the practices that characterize the work of organizers in social justice caucuses, I draw attention to how educators can collectively work toward change.

In doing so, this chapter contributes to the literature on educational change, social movement unionism, and social movement organizations. It also contributes to our understanding of the teaching profession for both scholars and preservice educators.

Likewise, it both documents and contributes to organizers' own reflections on the nature and significance of their work.

Findings

In my field work and interviews with members of social justice caucuses in the UCORE network, I have found that social justice caucuses use a series of common cultural practices to build the power necessary to transform not only educators' unions but also their schools and broader communities. In the next section of this chapter, I will discuss the shared cultural practices that characterize social justice caucuses in the UCORE network, focusing on the practices that they identify as essential to "building power." Later in this chapter, I will discuss a few major themes that emerge across both the practices of social justice caucuses. In particular, I will explore the ways that the practices of social justice caucuses often mirror their broader purpose, a trait common to social movement organizing that scholars refer to as *prefiguration*.

While UCORE organizers emphasize elements of their work at different times, in my research I have found that most social justice caucuses are working to transform their unions for democracy and social justice from the bottom up, building rank-and-file members' power in order to more fully engage in broader struggles for these principles in schools and society. Moreover, as I will explore in my discussion of the practices of social justice caucuses, organizers within the UCORE network employ cultural practices that align with this purpose. While it is clear that their work is far from complete, organizers in this movement have had substantial victories, among them: a new contract and elected school board in Philadelphia, a moratorium on new charter schools in Los

Angeles, a victory over neoliberal reforms such as merit pay in Chicago, and a guarantee of recess time and racial equity teams in Seattle.

With this in mind, the next section of this chapter will be devoted to synthesizing my findings on how UCORE educators have worked to transform their unions, schools, and broader communities from the bottom up. Before previewing my own analyses of how social justice caucuses move toward this goal, I will share excerpts from two of my early interviews in this project, in which educators offer a basic outline of the first steps in caucus organizing. At the end of the school year in 2015, I met with Adam Heenan, a key organizer in Chicago's CORE caucus and one of the founders of UCORE, at a coffee shop in the Pilsen neighborhood of Chicago. There, he offered some advice on how educators could begin organizing their own caucuses:

> Start small, build around their issues. You know traditionally "agitate, educate, organize". "Hey guys, I have an issue, what do you guys think about this?" Or, "Hey, what's your issue? Hey, would you come to our reader circle with me, pick a book to read together and sit?" So, you guys are sitting together, preferably in a neutral space which may or may not be a school, maybe like a coffee shop. I mean, we gather, naturally we do this already. But we do, and [. . .] we talk about our issues but we don't talk about who else outside of this circle I'm gathering with might also have this issue. So, you know, learn how to exercise power where you have it. (personal communication, May 30, 2015)

A few months later, in between sessions at the 2015 UCORE convention, I met with Dan Trocolli, one of the key organizers for Seattle's SEE caucus, in the lobby of the university building where the convention was held. There, I asked him to outline how caucus organizers build their movement, and he offered a basic, step-by-step guide that emphasizes several similar practices:

> Like if you have a meeting – if you are someone in a – let's say a local union, and you want to start organizing [. . .] – so you do this thing. You get this clipboard, and you think of something that's coming up in the

> union meeting. Let's say it's like we were asked to work a day extra and we're not getting paid for it. Or, they are cutting our art program or something in our district, how can you…? If I was there, I would make up – I would say something at the meeting if I could, make up a flyer, hand it out to people like, "Keep the art program. Meet me at this library Saturday afternoon." [. . .] And if you go to that meeting and only one or two other people show up, it's one or two people more people than were there before, and you start from there, and you just say, "Okay, what can we…?" Maybe the next step is, "What can we do to get more people out, or how can we raise this issue so people know what's going on?" And just see what people who show up want to do and go from there." (personal communication, August 8, 2015)

Several years later, as I conducted another round of interviews with caucus leaders, Kristin Luebbert of the WE caucus in Philadelphia offered a similar analysis of how the caucus began to form:

> You know, so it was just sort of always looking for people who maybe had similar interests [. . .] and were furious. [. . .] You know, people got to a point of being really angry and really upset, but that galvanized people. And then when they could see that they could meet some other people, they were just as angry, just as upset, but wanted to take another step and say, "What are we going to do about it? You know, we are going to talk, or we are going to publicize what we feel, we're going to write about it, we're going to meet other people, and eventually we're going to try to get some change." (K. Luebbert, personal communication, March 1, 2019)

As all three educators argue, caucus organizing often begins with connections between educators. Through these connections, educators gather together, share stories, discuss issues, and identify common challenges that they could address together.

While Adam, Dan, and Kristin were not aiming to summarize every way that caucus educators organize, they do review several key components of caucus organizing that came up time and again in my research within the UCORE network. Indeed, they review the first five of the following ten cultural practices of social justice caucus organizing that I have identified in my research alongside UCORE educators: 1) connecting with other educators; 2) gathering together; 3) sharing stories and resources;

4) engaging in dialogue; 5) identifying issues; 6) developing norms; 7) forging a collective identity; 8) leading campaigns; 9) linking struggles; and 10) reflecting on organizing. These ten cultural practices have developed organically within social justice caucuses and related organizations through the process of collective struggles against neoliberalism, systemic racism, and other inequalities.

In this paper, I will discuss what these practices look like for caucus organizers at different phases in their groups' development. In identifying these ten core cultural practices, I am not suggesting that they are used by all caucuses or that they proceed in a linear manner in the order provided. Moreover, I am not suggesting that this list of practices is exhaustive or universal. I am, however, suggesting that most active social justice caucuses engage in the majority of these practices. I am also arguing that caucuses generally engage in these practices to varying degrees depending on their experience, political ideology, goals, sociopolitical contexts, and relationship with their union. For more on this variation, see Chapter 6.

Figure 6.
Ten Cultural Practices of Social Justice Caucus Organizing

To capture some of the variation in how caucuses engage in these practices, I will roughly describe how each practice looks for caucuses when they are in the first four of

the following five recursive phases of development: emerging, coalescing, broadening, institutionalizing, and fragmenting. While I identified these phases inductively through iterative data analysis, I revised their titles and included phases I had planned to save for future studies based on feedback from caucus organizers and in dialogue with research on stages in the social movement research (e.g. Mauss, 1975). While social movement studies sometimes consider four or five generally linear stages of social movement development, this framework is notable for instead focusing on iterative phases of development within social movement organizations. While these phases emerged out of my research on social justice caucus organizing from 2015 to 2019, preliminary research suggests they are applicable to other social movement organizations and ongoing caucus organizing, which are areas for future research.

As discussed in Chapter 6, when a caucus is emerging, educators generally meet informally to discuss challenges they are facing and how they might address these challenges through a caucus. As part of these discussions, they might begin to establish a mission or norms for their group and develop campaigns to address immediate challenges in their local context, working independently or with community groups. When a caucus is coalescing, educators generally focus their energies on growing together as a group, bringing in more like-minded educators and solidifying their caucus's goals and mission even further. They might also expand their organizing to several campaigns, supporting leaders in their caucus to organize through committee- or building-level campaigns.

When a caucus is broadening, educators generally shift some of their focus toward organizing the entire membership of their local, beyond educators who already share their political ideologies or goals. In this phase, caucus educators may be

organizing members in the place of their union for collective actions such as a wildcat strike or sickout, working to win elected union positions so that they can successfully organize their entire membership, or training volunteer or paid organizers after having won elected positions in their locals. When a caucus is institutionalizing, organizers generally win a significant number of the top elected positions within their union, enabling them to develop new structures and campaigns that shift the union toward a social justice or social movement unionism model, often after winning elected leadership positions in their union. The broadening and institutionalizing phases align closely with McAlevey's (2016) definition of "organizing" in her discussions of the difference between advocacy, mobilizing, and organizing.

When a caucus is fragmenting, organizers may direct their energies toward other projects or organizations, in some cases leading to the dormancy or disintegration of the original caucus. In this chapter and in the dissertation more broadly, I do not focus significant attention on this final stage, as organizers in caucuses that are fragmenting are not widely represented in my research. In the few cases of organizers I have interviewed whose caucuses engaged in some practices that might be associated with the fragmenting phase – for example organizers in Classroom Struggle and Union Power, which did not meet frequently in the midst of their respective strikes – those caucuses were at the time also engaging in the emerging, coalescing, and institutionalizing phases. I therefore focus my attention on the practices associated with these phases in discussing caucuses that show some signs of fragmenting, rather than on caucuses that have gone entirely dormant (which, by definition, are not engaging in social justice caucus practices). A key takeaway from this discussion for future research is that caucuses may prevent

fragmenting by engaging in practices associated with the coalescing and broadening phases, and that they risk fragmenting if they move to the institutionalizing phase without continuing these practices. Moreover, my research suggests that if caucuses fragment entirely, they have the potential to resume their work by organizing a new caucus, generally beginning with practices associated with the emerging or coalescing phases.

In this chapter, I will discuss how the ten cultural practices of social justice caucus organizing differ across five phases: emerging, coalescing, broadening, institutionalizing, and fragmenting. Before embarking on this discussion, it is worth noting that these phases are ideal types (Weber, 1949), and that they are not exhaustive. Moreover, while the third and fourth phases of development generally lead to the most dramatic outcomes – major collective actions such as the Chicago and Los Angeles teachers' strikes – this does not mean that these phases are any more important than the previous two. It also does not mean that all caucuses move between these phases in a linear manner across all practices. Indeed, caucuses often find that they need to move between the coalescing, broadening, and institutionalizing phases at multiple times: to rebuild their caucus after winning union offices and institutionalizing their mission, for example, or to focus their caucus's identity on a set of principles after conflicts emerge in a wider movement. Likewise, caucuses often engage in practices that range between or across several or all of the five phases.

By highlighting common cultural practices of social justice caucuses, I hope to illuminate the commonalities between caucuses at several iterative phases in their development. In deciding to focus on phases, I am highlighting commonalities between caucuses that might seem to be ostensibly quite different, including urban caucuses who

have won elected union positions, urban caucuses who have not won elected union positions, statewide caucuses who have won elected union positions, and statewide caucuses who have not won elected union positions. While there are significant differences between these caucus positionalities, as is an area for further comparative case study research, I would argue that these different caucus types have significantly more commonalities than differences. Moreover, in highlighting the practices that caucuses engage in at different stages in their development, I am highlighting the similar questions and challenges that emerge for groups in very different contexts and positionalities.

With this in mind, what follows is a discussion of the common cultural practices of UCORE caucuses at different phases of their development. In this discussion, I will focus primarily on the perspectives of organizers in such active social justice caucuses as CORE, SEE, and WE, highlighting the first three phases of caucus development in particular. However, I will also include some discussion of caucus practices in the institutionalizing phase, turning my attention to such social justice unions as Chicago's CTU and Los Angeles's Union Power. I will also address some of the practices of new statewide caucuses such as West Virginia United, which arguably engaged in practices associated with broadening caucuses before addressing some of the key practices of coalescing caucuses as they developed formal statewide caucuses.

Connecting with other educators.

Connecting with other educators is the most fundamental practice in caucus organizing, enabling the caucus to form, grow, and build the power necessary for mass mobilizations and systemic change. In this practice, educators either spontaneously or

strategically engage in conversations with their peers about issues relevant to their work, political context, or goals. They may also purposefully engage in these practices, drawing on examples of caucus organizing from other contexts.

One important example of this practice is the "organizing conversation," a structured conversation that allows members to identify issues that matter to their co-workers, bringing their colleagues into a shared sense that they can address this issue together, often through collective actions led by the school staff, caucus, union, or surrounding community. In my research on caucuses across the UCORE network, I have found the organizing conversation to be a key tactic in caucuses at all phases of development. The organizing conversation is a central component of McAlevy's academic and popular texts on labor organizing, including her recent *No Shortcuts: Organizing for Power in the Gilded Age* (2016). It is also a key idea in the workshops and texts sponsored by Labor Notes, the labor organization that coordinates the UCORE network. In one of the resources used by caucus organizers to plan for organizing conversations, *Secrets of a Successful Organizer,* Labor Notes writers Alexandra Bradbury, Mark Brenner, Jenny Brown, Jane Slaughter, and Samantha Winslow offer seven steps for an organizing conversation: "discover the issues," "agitate," "lay the blame," "make a plan to win," "get a commitment," "inoculate and re-commit," and "set a follow-up plan" (Bradbury et al., 2014). In my fieldwork, I found that organizers in most caucuses promote some form of the organizing conversation, often including a version of these steps and occasionally directly drawing on Labor Notes resources.

As caucuses emerge, organizers often focus on connecting with like-minded educators who are facing or concerned about similar issues in their school, union, or local

communities. While some of these educators may have been politicized by their own experiences of the school system, others may come with prior political education or training through grassroots, labor, or leftist organizations (see Stark & Maton, 2019). These connections may happen at any moment in educators' lives, but spaces that bring together educators with similar goals – a union meeting, a grassroots education conference, a march or rally – are especially important in facilitating these connections based on my research. Together, these connections help to build a network of educators who may ultimately decide to form a caucus. We can see examples of this in the stories of educators forming new caucuses. For example, founding members of the CORE and SEE caucuses decided to form their caucuses after connecting with like-minded educators who were organizing against the threat of school closures (A. Ramirez, personal communication, July 18, 2019; J. Johnson, personal communication, August 4, 2015; J. Hagopian, personal communication, May 9, 2019). Educators in the red state strikes similarly discuss how they connected in person and electronically with like-minded educators to form their initial organizing team. Organizer Nicole McCormick of the WVPEU and the WVU caucus notes that they "found people that were likeminded that were willing to be outspoken, that were sharing things that were important that were willing to stand up and stick their necks out and say, 'This isn't right, or this is what we should do, or look at this'" (personal communication, April 16, 2019). In this way, caucus organizers connect with like-minded peers, building the caucus's base, which we can understand as a militant minority within contemporary educator movements as a whole.

As caucuses coalesce and deepen their collective identity, organizers often focus their attention on connecting with greater numbers of like-minded educators. In some cases, caucus organizers may recognize that the demographics of their group mirror or exacerbate issues around representation in labor as a whole, including having disproportionately white and/or male educators in their membership or leadership. With this in mind, they may focus some of their attention on reaching out to educators who would bring experiences or identities that are underrepresented in their caucus, including educators who identify as women and/or people of color. In addition to reaching out to new potential members, organizers may also focus on building the political education and leadership capacities of their own members so that they can lead recruitment efforts, building connections with additional like-minded educators.

We can see examples of this in the stories organizers shared at the 2015 UCORE convention. In a session titled "Using Our Unions as Vehicles to Build Racial and Social Justice," representatives from the CORE, WE, and emerging BMORE caucuses discussed strategies for connecting with additional educators of color to transform the leadership and demographics of their caucus (field notes, August 7, 2015). While this is a practice I associate primarily with the coalescing phase, it is worth noting that organizes in the BMORE caucus were remarkably mindful of this dimension before their caucus had officially formed, committing to developing a caucus that centers the leadership of women of color from the ground up. In their session, organizers in these and other caucuses discussed strategies for connecting educators who are underrepresented in their caucus, including encouraging existing members to support anti-racist actions and develop relationships with the educators and organizers leading them (field notes, August

7, 2015). SEE members have discussed similar strategies for building a more diverse base, emphasizing the importance of one-on-ones that encourage the leadership of educators who identify as women and/or people of color (field notes, June 23, 2018; D. Hoop, personal communication, February 21, 2019).

As caucuses broaden and expand their organizing capacities, they often shift their focus toward connecting with all members of their union or community. Some caucuses will engage in this process before winning leadership positions in their union, either in an effort to organize a broader campaign that builds power across their membership or in an effort to win elected leadership positions in their union. When reaching out to their broader membership, caucuses often work to develop an organizing "structure" that identifying "organic leaders" within every school or district, who can in turn lead "organizing conversations" and local meetings (McAlevey, 2016). While most caucuses focus on training organizers themselves from among caucus membership, some may use caucus funds to hire trainers or support members' attendance at organizing trainings led by Labor Notes or other organizations.

Organizers in Philadelphia's Caucus of Working Educators (WE) have focused some of their efforts on this form of connection since the 2015-2016 school year, when they engaged in their first campaign for leadership positions in the Philadelphia Federation of Teachers. As part of this campaign, they trained members to lead organizing conversations and developed a coordinated district-wide election campaign that included listening sessions throughout the city (field notes, January 27, 2016). As they have prepared for another election, WE organizers developed a more ambitious organizing structure, as well as shifting their focus toward leading organizing

conversations with organic leaders in schools across the district (C. Green, personal communication, March 16, 2019). While many caucuses take several years to get to the point where their focus is on organizing their entire base, others establish this focus from the start. This is especially true of the statewide networks that developed in the strike wave of 2018. Organizers in Arizona Educators United built a robust statewide organizing structure modeled after the CTU's Contract Action Teams (R. Garelli, personal communication, May 6, 2019).

When they are institutionalizing, caucus organizers often reorganize their union to develop structures that enable them to connect with educators across their membership (see McAlevey, 2016). Upon winning leadership positions, elected organizers often focus on this form of connection. They may also hire paid organizers or/or develop union structures for training rank-and-file members as organizers. As their caucus-affiliated elected leaders organize the entire membership through their union, rank-and-file caucus members may realize they need to return to the practices associated with the coalescing phase to rebuild their caucus and build the leadership capacities of new organizers.

Upon winning elected positions in the Chicago Teachers Union, CORE organizers developed a strong organizing structure of Contract Action Teams in the lead-up to their successful 2012 strike (see McAlevey, 2016). Likewise, upon winning elected union positions, members of LA's Union Power caucus created their own CAT teams modeled after those of CTU leading up to their own successful 2019 strike (field notes, April 13, 2019) In the meantime, rank-and-file caucus members have focused on rebuilding and growing their caucus by connecting with new educators to varying degrees since representatives from their caucuses won officer positions.

Gathering Together.

Much like connecting, gathering together is an essential element of a caucus organizing. In this practice, organizers meet in groups to engage in discussions, lead campaigns, or broaden their network. These meetings may be formal or informal. They also vary in their structures, including both horizontal and vertical groupings. Organizers may choose to meet online or in-person, depending on the geographical scale of their caucus and the preferences of organizers, but even groups most associated with virtual organizing – including statewide caucuses such as WVU – emphasize the importance of in-person meetings. In my consideration of the spaces where UCORE educators gather together, I conceptualize them as what Fraser (1990) calls "subaltern counterpublics," which she defines as "parallel discursive arenas where members of subordinated social groups invent and circulate counterdiscourses, which in turn permit them to formulate oppositional interpretations of their identities, interests, and need" (p. 67). Fraser further notes that subaltern counterpublics allow organizations to both "regroup" together and to plan for "agitational activities directed toward wider publics," a "dialectic" that Fraser identifies as the source of the "emancipatory potential" of these counterpublics (p. 68).

As caucuses emerge, they often engage in informal, exploratory meetings. These might include meetings to address pressing issues, discuss texts that are relevant to their local contexts, or debate whether they want to form a caucus and what this caucus might look like. These initial meetings can be quite informal, as suggested by CORE organizer Adam and SEE organizer Dan in the interview excerpts shared at the beginning of the findings section. As Adam notes, organizers often aim to select a "neutral space," such as a café or a school building, for initial planning meetings (A. Heenan, personal

communication, May 30, 2015). In some cases, these initial meetings may take the form of book groups; organizers in Albuquerque, Chicago, and Philadelphia decided to form their caucuses as they participated in book groups on issues such as neoliberalism and social justice unionism (A. Heenan, personal communication, May 30, 2015; C. Green, personal communication, March 16, 2019; F. Bluher, November 18, 2015.) In the case of statewide caucuses, these initial gatherings may be online, such as a Zoom, Facebook chat, or conference call to bring together like-minded educators (N. McCormick, personal communication, April 16, 2019; field notes, April 20, 2019).

As caucuses coalesce, organizers engage in both formal and informal meetings, developing new spaces for peers to come together. These spaces often include a larger body that brings together all caucus members and smaller guiding bodies, such as a Steering Committee. Over time, organizers may also develop campaigns or committees that meet separately from the general membership to more deeply explore relevant issues, as well as spaces for political education and socializing. As the spatial orientation of the caucus becomes more disperse, a common challenge is ensuring open multidirectional communication between groups that meet separately and the wider membership or leadership.

At this phase, caucuses may develop a wide range of formal and informal spaces to bring educators together. As previously mentioned, these often include formal meetings held in accessible public venues such as libraries, schools, university classrooms, or nonprofit multipurpose spaces. These more formal meetings include general membership meetings, steering committee meetings, annual conventions, and in some cases committee meetings. In the SEE caucus in Seattle, organizers have

predominately organized ongoing campaigns in break-out sessions during their general membership meetings, with organizers meeting outside of the general group for campaigns around such issues as ethnic studies and stopping cuts. Organizers also develop gatherings in more informal spaces such as homes or bars, hosting book groups, celebrations, fundraisers, and other events. In this phase, organizers may evaluate whether the space is welcoming to educators and community members who they want to include in their work. At the 2017 UCORE convention, an organizer in Philadelphia's Caucus of Working Educators (WE) notes their caucus was "moving into prioritizing spaces that people of color felt comfortable to attend," hosting less happy hours because educators of color commented that "that's a white space" (field notes, August 5, 2017).

As caucuses broaden, organizers develop structures that support local meetings across their entire union membership, including organizing committees, regional committees, or building-level Contract Action Teams or liaison teams. Likewise, as new spaces are created that bring together educators with more diverse ideologies, organizers may recognize the need to maintain or create spaces that bring together like-minded educators. They may also recognize the need for spaces or strategies dedicated primarily to the political education of the wider membership.

Caucus organizers may develop spaces for a range of campaigns and committees to meet, with some focused on engaging the entire membership and others focused on continuing to develop their base. The Caucus of Working Educators has developed a strong model for this, with regional and building-based meetings creating spaces for the wider membership to gather together, while committee, organizing, general membership, and steering meetings bring together and build the caucus's base (C. Green, personal

communication, March, 16, 2019; K. Luebbert, personal communication, March 1, 2019). Even as organizers develop campaigns and actions that provide spaces for the broader union membership to gather together, however, they generally continue providing other spaces that allow their core to coalesce, including committee and campaign meetings around such initiatives as Black Lives Matter at School.

As caucuses institutionalize upon winning elected union leadership positions, organizers may develop new formal spaces for the broader membership to gather together. The development of strong communication processes becomes even more important for organizers in this phase, whether they are organizing exclusively through a caucus or utilizing the resources of the full union. Organizers may focus the institutional resources of the union on developing spaces that engage the entire membership while allowing the caucus to focus on building the base, although this is not always the case.

Organizers in the CORE and EDU caucuses provide two different models for creating new spaces for educators to gather together, depending on the extent to which caucus organizers have won leadership positions in their union. Upon winning elected positions in the CTU, CORE leaders developed formal union spaces for educators to gather together and develop their organizing skills, including Contract Action Teams at each school site and a summer organizing institute that brings together educators to learn strategies and engage in campaigns (K. Mayle, personal communication, May 30, 2015; K. Osgood, personal communication, July 6, 2015; J. Johnson, personal communication, August 4, 2015). In the meantime, the caucus has developed and maintained both spaces for educators to democratically debate the direction of the caucus and union, engage in

political education, deepen relationships, and develop independent campaigns (D. Pope, personal communication, February 11, 2019).

After winning the top officer positions in the Massachusetts Teachers Association (MTA) but not the majority of board positions, EDU leader Barbara Madeloni had to determine how to appropriate existing union spaces to support her caucus's goal of democratically organizing MTA's educators and building their collective power. Working with Labor Notes organizer and key UCORE facilitator Ellen David Friedman, she revised the union's Next Generation Leadership program as a three-day, thirty-six-hour training. While the original program had offered a more traditional approach of helping identified leaders to "join the bureaucracy," this alternative approach uses Freirean problem-posing pedagogies to enable educators to "talk about their experiences as organizers – the assumption is they are organizers – and use that to begin to name their experience, identify power, and think about how they can organize collectively at the worksite to push back" (B. Madeloni, personal communication, June 7, 2019). This training builds on the Freirean methods that Ellen David Friedman has developed throughout her work in the labor movement, including facilitating meetings and leading organizing conversations through Labor Notes and UCORE (E. David Friedman, personal communication, May 21, 2019).

Sharing stories and resources.

Another crucial practice in social justice caucus organizing is sharing stories and resources. Indeed, this practice was one of the first themes that stood out in my pilot research on grassroots organizing and social justice caucuses in 2014. In this practice, educators and allies share stories about a range of topics such as challenges in their local

contexts, organizing successes, or recent steps in a campaign. They also often share resources such as policies, research, or tools they have used in their own campaigns. As I explore in Chapter 9, this step is as fundamental to the spread of policies between social justice caucuses as it is to the development of relationships and campaigns within a single caucus, confirming research on narrative processes in social movements (Polletta, 2006). Moreover, as this sharing enables a corresponding cultural practice of "listening," this practice aligns with the first of three steps of "problem-posing education" identified by Wallerstein (1983) in Paulo Freire's critical pedagogy.

As caucuses emerge, organizers often share stories from their own experiences or those of their colleagues or students. This storytelling allows them to deepen social ties and solidarity among members. It also enables educators to identify common challenges in order to develop campaigns. Moreover, it fosters the political education of a developing group, allowing them to come together around key principles and forge a collective identity. In addition to sharing stories, caucus organizers share tools to support potential or ongoing campaigns, ranging from an idea for a union resolution to an organizing tool that was successful in another caucus.

Storytelling has been crucial to the development of both statewide and urban caucuses and networks. As Nicole McCormick noted in an interview when discussing how she and other organizers developed the West Virginia Public Employees United network and the West Virginia United caucus, many educators believed their own financial struggles were unique before hearing stories from educators across the state. Educators in urban caucuses likewise note that storytelling has allowed them to develop relationships, identify shared challenges, and develop campaigns as a group (personal

communication, April 16, 2019). In the excerpt shared at the beginning of this section, for example, Kristin Luebbert of the WE caucus highlights the importance of educators sharing not only their experiences but also their feelings of anger in order to decide to take action (personal communication, March 1, 2019). Although this process often happens organically, it echoes the leftist labor movement motto, "agitate educate organize!"

As caucuses coalesce, organizers foster opportunities for educators and other allies to share stories in a wide range of venues to develop deeper understandings of caucus issues. In this way, storytelling allows caucus organizers to deepen and affirm their collective identity. It also informs the development of a wider number of campaigns from the bottom up. As a caucus grows and takes on a wider range of issues or struggles, storytelling allows members to stay appraised of the work of other campaigns and committees. In this phase, as caucuses empower members to lead their own campaigns, organizers often share resources and strategies they have developed outside of caucus meetings, getting feedback from the wider membership and ensuring that their campaign materials align with the caucus's mission and principles.

Storytelling has been central to SEE meetings throughout my time as a participant observer organizing within the caucus. In many cases, this practice helps caucus members to develop new campaigns and link local struggles to the caucus's work. For example, as Matthew Cleary noted in an interview, he became involved in SEE after attending a meeting to discuss the closure of one of the campuses of Middle College High School. By sharing experiences from his context, he found a group of allies in the district, who in turn collaborated with him in the fight to stop the closure of his school (personal

communication, September 14, 2015). Storytelling is also frequently used by organizers leading campaigns that meet, at least in part, outside of SEE meetings. In the 2018-2019 school year, for example, SEE meetings have frequently included updates from organizers leading racial justice work through the Black Lives Matter at School campaign and anti-austerity work through the Against Cuts and Displacement (AC/DC) campaign. Organizers in the WE caucus have also extensively used storytelling as a strategy for bringing local struggles into the public's perception, whether through speeches at the local school board or public scholarship (K. Luebbert, personal communication, March 1, 2019).

As caucuses broaden and organizers build a structure to reach out to their entire membership, they will often share stories both in their local contexts and across a wide network. In this way, storytelling helps organizers continue to build collective identity and a sense of solidarity among a widening base. Storytelling may also help advance the political education of all educators in a given union which becomes even more important in a group that may include wider variation in educators' ideologies. With these goals in mind, caucus members may also develop new spaces or media to share stories, strategies, and resources with their members.

Amid the historic educator strikes of 2018 and 2019, caucuses across the country hosted strike leaders and featured them in panels to share their stories, hoping to foster the learning necessary to build power across their local union's membership. In the SEE caucus in Seattle, organizers hosted three panels featuring strikers from struggles in such contexts as Arizona, Los Angeles, Puerto Rico, and West Virginia (field notes, March 31, 2018; field notes, August 23, 2018; field notes, January 22, 2018). In these panels,

organizers told stories that detailed both their local political context and the ways that they have organized. In doing so, they support other organizers' efforts to broaden their work and engage their entire union membership. Educators in the West Virginia United caucus and networks such as West Virginia Public Employees United and Arizona Educators United have likewise provided models for digital technologies to share stories, strategies, and resources with members across their states (J. O'Neal, personal communication, May 8, 2019; R. Garelli, personal communication, May 5, 2019). When it became clear that members of Arizona Educators United (AEU) did not have prior experiences leading walk-ins, for example, AEU organizer Rebecca Garelli streamed a live video while she led a walk-in at her school (R. Garelli, personal communication, May 5, 2019).

As caucuses institutionalize, they often create new venues and media for sharing stories from their own and other contexts with the union's membership. Upon winning elected leadership positions in UTLA, Union Power members have used the annual leadership convention and other panels to further members' political education by featuring speakers on issues relevant to their work. For example, as members considered the complexities of charterization and charter school unionization in the LA context, they developed a panel featuring charter school educators (A. Inouye, personal communication, August 7, 2015).

Engaging in dialogue.

In both informal and formal caucus meetings, organizers speak with each other and make decisions. Within a local context, these conversations serve a wide range of goals, including helping educators to understand each other's experiences and

positionalities, identify shared issues, and decide on campaign strategies. In short, educators in UCORE engage in dialogue and debate around all elements of caucus organizing. As caucus organizers share strategies across contexts, discussions further serve to help organizers understand whether and how an issue or tactic might apply to their own context. They also help organizers to identify and address shared challenges. This practice aligns closely with the second cultural practice that Wallerstein (1983) identifies in her consideration of the critical pedagogy tradition of problem-posing education: “dialogue.” As such, we can see educators’ engagement in this practice as an example of the praxis of critical pedagogy in social justice caucuses.

Dialogue is especially important for navigating conflicts within caucuses. Generally speaking, I have found that social justice caucus organizers address internal conflicts with mutual respect and a shared sense of purpose. The majority of conflicts that emerged in my field work have been linked to ideological tensions between organizers over whether to emphasize racial or economic justice; whether to focus on organizing inside or outside of the union; and whether organizers were meeting their stated goals of democracy or justice in the organizing process. It is therefore important to note how much these conflicts are necessary and integral to the work of developing multiracial caucuses in a wide range of sociopolitical contexts, and that it is important for organizers to develop strong relationships across race and class lines to bring these tensions to the surface and allow them to reshape the caucus and network to be even more inclusive. In her participatory research with the WE caucus, Maton (2016b; 2018) offers a strong model for using inquiry groups to deepen organizers’ relationships and create spaces for transformative discussions around racial inequalities and caucus organizing, for example.

As caucuses emerge, organizers may engage in largely informal discussions and debates. Because many caucuses form in response to an immediate crisis in their schools or local contexts, such as school closures, members of an emergent caucus often focus their conversations on the logistics of developing a campaign in response to this crisis. Likewise, if the caucus is bringing together mostly like-minded educators, they may focus more on developing tactics than negotiating conflicts in their ideologies. Others, however, may begin to address these issues as they form their caucus.

Both urban and statewide caucuses and networks debated strategies for engaging with their unions as they determined whether to form a caucus, for example. Kristin Luebbert of the WE caucus, notes that organizers debated how to push their union, the PFT, and Philadelphia's now-disbanded School Reform Commission (SRC), and whether to form a caucus (personal communication, March 1, 2019). Nicole McCormick likewise notes how the founders of WVPEU and WVU used digital technologies such as Slack, Zoom, and Facebook messenger to "talk to each other every day" and engage in "constant discussions" around such questions as: "[H]ow do we promote that? Are we going to be able to get our unions to join on? If not, how can we make sure that they don't like cut our legs off from under us?" (personal communication, April 16, 2019).

As caucuses coalesce, they often engage in a wide range of both informal and formal discussions and debates, using questions to push each other's thinking and deepen their collective analysis. These discussions and debates often revolve around the best way to focus the group's energies, including potential campaign strategies. Their conversations might also address or return to conflicts around differing ideologies. A common tension as caucuses coalesce is the tension between members offering class- or

race-based explanations for inequalities in their schools and broader society. These tensions make the development of norms for discussion and debates even more necessary, if they were not already created when the caucus was emerging.

While caucuses engage in dialogue and debate around every element of their work, I have noted that caucuses pay particular attention to navigating tensions around different forms of justice as they coalesce. For example, educators in such caucuses as Massachusetts' EDU, Philadelphia's WE, and Seattle's SEE caucuses have engaged in discussions around whiteness and racial justice within their own caucus (field notes, January 7, 2018; T. Castro Gill, personal communication, February 13, 2019; C. Green, personal communication, March 16, 2019). Kristin Luebbert of the WE caucus notes, for example, that caucus members have needed to engage in "hard conversations" over the course of the caucus's history, especially in cases when caucus members differ in their main goals (personal communication, March 1, 2019). As caucuses coalesce, they may also engage in more nuanced conversations around the purpose of a given campaign, who they are targeting, and how they will assess its success. SEE members, for example, engaged in rich discussions over the role they would play in bargaining, given the fact that few SEE members were named to the bargaining team and the caucus has been unsuccessful in changing the union's approach to bargaining (field notes, June 23, 2018; field notes, August 4, 2018). SEE member Darrin Hoop notes the importance of "open, democratic discussions" to strategy and campaign development in the caucus (personal communication, February 21, 2019).

As caucuses broaden to organize their entire union, educators often find they need new mechanisms for debate and discussion, including more formal structures. Within

caucuses, this may mean revising their organizational structure to ensure the existence of multiple spaces for debate among both core members, the wider caucus base, and the entire union membership. The WE caucus in Philadelphia has developed such spaces as a steering committee, organizing committee, regional committees, and building committees, each of which provide formal spaces for debate and discussion among members (L. Pahomov, personal communication, May 14, 2019). Within statewide caucuses and networks, groups such as Arizona Educators United developed strong mechanisms for sharing insights from local discussions with statewide organizers (R. Garelli, personal communication, May 6, 2019).

As caucuses institutionalize, they may develop more formal spaces for their entire membership to engage in dialogue. If they are pursuing an SJU model once elected to leadership positions, organizers will need to determine where in their structure they will develop opportunities for authentic debate and discussion among members, and how these debates and discussions will be used to inform the direction of the union as a whole. Within Los Angeles's Union Power caucus, for example, organizers have considered whether the caucus or the union itself represents the best space for debating the direction of the union (G. Russom, personal communication, May 13, 2019). This is also true for organizers in Massachusetts' EDU caucus. After winning the presidency of the MTA, Barbara Madeloni held thirty-seven forums across the state that allowed the union's membership to discuss their respective visions for public education, the barriers preventing form achieving that vision, and how they might collectively fight back to achieve it: "We brought members together to ask them, what was their vision for public education? What kept them from being able to achieve that vision? And what do they

want to do to fight to get that vision?" (B. Madeloni, personal communication, June 7, 2019).

Identifying issues.

In this practice, educators draw on their collective experience, conversations, outreach, and analysis to identify common challenges or issues. This practice is fundamental to the development of caucus's collective identity, as well as the development of campaigns that relate to the issues that caucus, union, and community members are facing. It is also a key practice for organizing members from the bottom up by developing campaigns around the issues that matter most to them.

As caucuses emerge, organizers generally identify issues to respond to collectively within their local contexts. Educators may come together around issues that their local unions have failed to address. In Chicago, Philadelphia, and Seattle, for example, caucus organizers identified school closures as a pressing issue to organize around as they formed their caucuses (see Stark & Maton, 2019). As CORE founding member Jen Johnson notes, educators came together to organize because they identified issues they could address together: "We just knew that you know we needed to do more fight school closings and unjust firings, and we knew that the union was the biggest organization that could be tackling these issues in a meaningful way" (personal communication, August 4, 2015). Another significant dimension of this phase is that educators are able to develop solidarity and resolve as they recognize shared struggles. In discussing early conversations on the West Virginia Public Employees United Facebook page, Nicole McCormick notes that when educators "really started talking to each other [...] everybody is going, how am I going to afford you know these increases, like why is

it that they are able to get all of my personal information, that I have to wear a Fitbit or I get fined $500?" (personal communication, April 16, 2019).

As caucuses coalesce, organizers continue to identify issues that affect their members and immediate networks, and they may also identify issues that are not immediate crises but more long-standing challenges, including ongoing issues connected to austerity, privatization, or systemic racism. For example, Seattle's SEE caucus identified both a pressing immediate issue and a long-standing challenge when educators from John Muir elementary school were threatened for organizing an event to affirm their Black students' lives. In their discussions, SEE organizers considered how to both show solidarity with the John Muir community and join them in addressing institutional racism (field notes, September 18, 2016). Caucus educators may use surveys, meetings, or other tools to gain perspectives of educators, students, and/or community members.

As caucuses broaden, organizers develop additional processes for gaining information on issues relevant to members across entire union or network. They work to empower local groups – whether building-level Contract Action Teams or regional groups – to identify issues themselves and organize at the local level. For example, the WE caucus uses its regional meetings to identify issues that could be addressed by the entire caucus, as organizer Kristin Luebbert explains: "if within your regional meeting something is brought out, I think people can bring that right back to organizing and say, 'Hey, this is what they are talking about region nine that's crazy, and we need to see what we can do about this thing" (personal communication, March 1, 2019). In some cases, this identification process may lead broadening caucuses or unions to focus on issues they see as less controversial to the full union.

As caucuses institutionalize, they have the opportunity to develop even more sophisticated processes for reaching out to their entire membership to identify issues that important to them. These may include building-level meetings, surveys, and union-wide bargaining unit discussions. The Schools Our Students Deserve campaigns in social justice unions in Chicago, Los Angeles, St. Paul, and other contexts offer strong models for using a research process to identify issues that are important to the union's membership and the communities they serve, as well. Unions face additional challenges in allowing for full democratic participation of their membership in identifying issues, however. Caucus organizers may face challenges of scale as they work to reach out to their entire membership, and they may need to negotiate the extent to which they will organize issues identified by the smaller caucus and/or the broader membership. Organizers may also have to navigate new tensions within their roles as union leaders in order to maintain transparency in these democratic processes.

Developing norms for discussion and democratic decision making.

Caucus organizers are often quite critical of norms in their school districts and unions, such as the lack of transparency in bargaining, the lack of democracy in decision-making, or the underrepresentation of women or people of color in leadership positions. With this in mind, they are generally quite reflective about whether they are replicating these same norms in their own organizing. With this in mind, caucus organizers often proactively develop anti-hegemonic norms in order to challenge these dominant hierarchies. This is inherently prefigurative, as caucus organizers are often developing norms that they would like to see replicated in their broader unions, schools, and communities.

As caucuses emerge, organizers generally discuss ideas and make decisions without extensively discussing their processes for doing so. They may agree upon an initial set of norms as needed. Consensus-based decision making is especially common in the emerging phase, although it is common in the coalescing phase as well. While many caucuses develop formal norms later in their organizing, the Caucus of Rank-and-File Educators (CORE) in Chicago developed formal bylaws early in its growth as a caucus, and veteran CORE members caution against getting too caught up in the process of developing norms early on (D. Pope, personal communication, February 11, 2019).

As caucuses coalesce, organizers often experiment with, agree upon, use, and adapt organizational norms. Common norms include the use of agendas as stacks for meetings. For example, progressive stack has grown popular for addressing inequities in caucus organizing, such as the reproduction of dominant racial and gender inequalities (field notes, August 5, 2017). As SEE member Tracy Castro Gill notes, however, procedural changes alone will not change the culture of a caucus, and organizers should attend to whether women and people of color's perspectives are being centered in caucus decisions (personal communication, February 13, 2019).

Many caucuses use a voting system for major decisions, with some variation in the level of formality. The SEE and WE caucuses, for example, engage in a process that is somewhere between vote- and consensus-based. As WE organizer Larissa Pahomov notes, many caucuses do not move forward with ideas that face significant opposition within their group:

> It's more consensus based than voting based. You know, and I think that generally is reflection of the idea where it's like, again, if you want something to be successful, you have to be able to explain it and move people successfully. And that like if you can't – right if you propose

> something and it's clear that people aren't moved, then like in most cases you don't need a no vote. It's confirmed that like it's not working, right. So instead you need to consider, okay, is this dead in the water or does it need an overhaul? (personal communication, May 14, 2019)

Other common norms include agenda-setting, interactive brainstorming processes, committee guidelines, and the use of Roberts's Rules of Order (RRO) in some caucuses. At the 2016 UCORE convention, a member of New York's MORE caucus noted the tension her caucus has navigated between not wanting to create formal structures that might hinder full democracy and realizing that you need some systems in place for organizing to run smoothly (field notes, August 6, 2016).

As caucuses broaden, organizers may expand upon norms created in earlier stages or allow local groups to establish their own norms. While it may seem counterintuitive, wider organizing structures can in some cases allow for more flexible and localized norms. In the broadening organizing structures created by the WE caucus in Philadelphia, for example, norms may vary between building meetings, regional meetings, and steering committee meetings.

As caucuses institutionalize upon taking leadership positions in their union, they may revise existing institutional norms and structures. They may also adjust the norms of their caucus to reconcile the respective roles of the elected union leaders representing the caucus and other members. In the CORE caucus, for example, the union president has a vote on the CORE steering committee, but other officers do not (CORE, 2018)

Forging a collective identity.

To forge a collective identity, members develop and articulate a shared set of values or goals. In many cases, organizers balance a range of ethical principles in their goals, including both economic and racial justice, as well as democracy. In this way,

organizers come together to forge a collective identity grounded in what Apple (2013) calls "decentered unities." Given the dominance of racial capitalism and white supremacy in the United States, however, organizers may find it important to "center" their work on racial justice, using this as a lens through which to approach and integrate other core principles. Regardless of their approach, organizers generally strive to develop an identity that enables "interest convergence" between diverse groups, with more widely embraced principles often emphasized in the "broadening" phase.

Organizers generally revisit their collective identity throughout the history of caucus organizing, particularly as their caucus coalesces. Throughout these phases, they may communicate their shared values and goals through official documents such as mission statements or campaign platforms. Likewise, they may develop such visual unifiers such as t-shirts, signs, or stickers to celebrate and communicate their shared identity.

As caucuses emerge, organizers may develop an identity that focuses on a key element of their work, such as the desire to advance democracy or racial justice in their union. We can see this in the initial CORE caucus documents that stated their intention to create "A union that actually fights [for] its members" (in Uetricht, 2014, p. 32). Likewise, the statewide networks that developed in the educator uprisings of 2018 generally focused their attention on issues of economic justice, such as school funding and educator compensation. It is worth noting that educators leading these same networks generally develop a more extensive and often-critical set of core principles as they form caucuses, as discussed in the "coalescing" section below.

While many caucuses focus on a more limited range of purposes and goals when they form, others may model themselves on other established groups, developing mission statements or points of unity that address a wide range of issues. The newly-formed Renton Caucus of Rank-and-File Educators (R-CORE) in the Puget Sound region of Washington state, for example, integrated the full UCORE mission statement as its own guiding document when it first formed as a caucus. On the mission statement page of their caucus website, they noted, "R-CORE members will operate under this mission statement until we vote as a body to make any revisions" (RCORE, 2018). In later updating their statement, we could see an example of organizers moving between the "emerging" and "coalescing" phases of forging a collective identity.

As caucuses coalesce, organizers develop or adapt caucus mission statements that establish a unified identity that allows for differences while deepening the political education of members on a range of issues. Often caucuses forge an identity that allows for "decentered unities," as discussed above (Apple, 2013). Most caucuses in the UCORE network revise and revisit their mission statements multiple times. Caucus organizers may adapt their mission statement as they develop and continue to identify the issues and principles that are most relevant to their local context and current material conditions. They may also do so to navigate tensions among the ideologies or experiences of members or to reorient their work. As Maton (2018) documents, members of the WE caucus in Philadelphia shifted their emphasis from neoliberalism to racism over the course of their participation in an inquiry group, which, in turn, led them to "center race" in their organizing and develop a racial justice committee (field notes, August 5, 2017). Organizers in the Seattle SEE caucus similarly revised their mission statement and

"points of unity" to ensure that "an anti-racist, anti-oppression" lens is used in every dimension of their work, a process that I collaborated on in my militant ethnographic work (field notes, June 26, 2017).

As caucuses broaden, organizers may expand their framing to bring in a wider base of members. When organizers are engaging in electoral campaigns or organizing for mass collective action such as a strike, for example, they may focus on demands that unite their membership. Whether organizing through a caucus or in elected union leadership positions, organizers may continue to focus on a more radical set of principles in discrete campaigns. Or, upon winning elected leadership position, they may use the original caucus to advance ideas or campaigns that are controversial to the broader membership.

We can see an example of this broadening in the organizing of the Caucus of Working Educators (WE) as ran for offices in the Philadelphia Federation of Teachers (PFT) in 2016. While the caucus as a whole shifted toward centering racial justice alongside democracy and economic justice as they coalesced between 2014-2016, during their electoral campaign organizers developed a platform that emphasized union democracy and member advocacy, principles believed to draw in the full membership of the PFT. In a document titled "Why Working Educators? 7 Ways Your Vote for Working Educators Will Mean Positive Change for the PFT," WE organizers emphasized how the slate of leaders they were promoting would ensure that union staff and building representatives were more responsive to members' needs. They also emphasized how they would transform the PFT into a union that will "fight for you on all fronts" and "builds power by involving ALL members" (WE, 2016a).

While individual candidates such as Vice President of Elementary Schools candidate Peggy Savage continued to emphasize racial justice and the caucus continued campaigns that centered racial justice (WE, 2016b), we can see a “broadening” of the caucus’s collective identity to draw in less politically developed PFT members at this phase which is common for caucuses working to engage their full union membership. As I interviewed organizers in the caucus who were preparing for a second attempt to win union leadership positions three years later, I found that organizers were taking a similar broadening approach to their collective identity, while integrating even stronger organizing tactics and structures to engage their full membership. In doing so, organizers allow for interest convergence between antiracist educators and their colleagues who at times espouse “racist and classist” views (C. Green, personal communication, March 16, 2019).

As caucuses institutionalize, they face similar challenges in developing a collective identify for their entire union that aligns with the caucus’s original vision as well as representing the more diverse ideologies of their entire membership. In her work as president of the CTU, CORE organizer Karen Lewis frequently evaluated the union’s strategies using variations on the following three questions: “Does it unite us? Does it make us stronger? Does it increase our power?” (field notes, April 26, 2015). By developing campaigns and messaging that fulfills these questions, CORE leaders in the CTU have been able build a union with a strong collective identity that unites workers and builds the union’s power.

Leading campaigns with a range of demands, targets, and tactics.

Campaigns are arguably the most visible and impactful element of caucus organizing. Social justice caucus organizers in the UCORE network develop campaigns that frequently center around a clear set of demands, targets, and escalating collective actions. Common campaign focuses include racial justice issues such as Black Lives Matter at School and ethnic studies; union democracy issues including common good bargaining and elections; and education policy issues such as closures, charterization, or privatization. Campaigns often address multiple targets, including school or district administration, union leadership, corporations, and city, state, or federal government.

The most visible collective action within caucus campaigns is a walkout or strike, but this is by no means the only significant form of collective action. Caucuses generally include a range of tactics and collective actions in any given campaign, including petitions, rallies, job actions, civil disobedience, organizing conversations, election slates, and union resolutions or New Business Items (NBIs). Moreover, these tactics often include both internal and external political education through newsletter articles, public actions, controversial union resolutions, book groups, and forums with speakers. Arguably, every element of a campaign could be considered a form of political education (see Stark & Maton, 2019), and caucus organizers discuss the potential for changes in educators' consciousness within campaigns regardless of whether their demands are met. As caucus organizers lead campaigns, we can see their participation in the third practice of problem-posing education identified by Wallerstein (1983): "action."

As caucuses emerge, they often organize around a single pressing issue, such as school closures or health care. Likewise, they may focus their campaign primarily around confronting a more limited range of targets, such as the school district or legislature.

Most caucuses still use a wide range of tactics in this phase, however they will likely gain additional tactics as their membership and experience grows. Throughout this phase and each of the others, members generally take on roles that meet their own skill sets and interests to support the campaign they are working on, although these roles may be formalized in later phases.

Chicago, Philadelphia, and Seattle educators' campaigns against school closures are strong examples of the campaign strategies caucuses use as they emerge. In each case, organizers developed and supported campaigns against the immediate crisis of school closures and educator displacement (see Stark & Maton, 2019). Likewise, West Virginia educators' campaign against cuts to their Public Employees Insurance Agency (PEIA) insurance plans is a strong example of a campaign that demonstrates elements of both the emerging and broadening phases of campaign development. As a new educator network with organizers who would go on to form a formal caucus that summer, West Virginia Public Employees United leaders developed a campaign that addressed an immediate crisis in their local context (N. McCormick, personal communication, April 16, 2019; J. O'Neal, personal communication, May 8, 2019). In doing so, however, they adopted and used Chicago Teachers Union (CTU) organizing strategies that we would associate with broadening campaigns, as I discuss further in the broadening section below.

As caucuses coalesce around a set of shared principles or goals, caucuses often lead a number of campaigns related to their collective identity at the same time. Some of these campaigns may develop into working groups or committees who can focus on a single issue or set of issues. In their campaigns, caucuses generally develop a range of escalating actions with several targets and demands. Unlike caucuses with campaigns at

the broadening phase, they do not limit their demands to those that are likely to unite their entire union membership.

The SEE caucus in Seattle has shifted toward organizing through campaigns and committees over the course of the past several years. In this caucus, organizers meet in "breakout groups" committed to a single campaign during General Membership meetings, as well as meeting separately as needed. Organizers may also develop campaigns that unify demands from their various committees and campaigns. For example, in their campaign to push progressive issues in the Seattle Education Association's 2018 bargaining, organizers advocated for racial justice issues such as implementing ethnic studies and restorative justice across Seattle schools; education justice issues such as a lower counselor ratio and wrap-around social services in every school; economic justice issues such as 15% and 20% higher compensation for certificated and classified staff respectively and full health care for substitute educators; and labor democracy issues such as supporting the demands of each bargaining unit (field notes, March 22, 2018).

The SEE caucus's contract campaign in the 2018 school year included a range of escalating collective actions, including: advocating for a Bargaining for the Common Good model in the Seattle Education Association Representative Assembly, using democratic processes to determine a set of demands that align with the caucus's points of unity, developing newsletter articles advocating for each of these demands, organizing rallies that call for these demands, advocating for these demands in bargaining meetings, and campaigning for a no vote on the contract. Through these actions, the caucus targeted the full SEA membership, union leadership and negotiating team, district leadership and

negotiating team, and the broader public with the hope of changing the political consciousness of each target and winning their demands (field notes, August 4, 2018). To the extent that these campaigns strove toward organizing the union's entire membership, we can see that some of the caucus's practices align with the broadening phase as well.

As caucuses broaden their focus to engage or organize a wider base, they may develop campaigns that appeal to common interests across their union membership, while continuing campaigns that offer political education to push that base toward a deeper understanding of issues relevant to the caucus's identities or principles. Broadening SJU caucuses often also focus their attention on campaigns that can engage their entire membership in discrete, escalating actions – ranging from signing a petition or membership card to engaging in a practice strike vote – that can test the strength of their structure. In her influential book, *No Shortcuts,* McAlevey (2016) discusses these actions as "structure tests."

The WE caucus in Philadelphia has offered a strong example of how caucuses can engage in broadening campaigns before winning elected leadership positions. In organizing their recent campaigns, WE educators have considered how to maintain their focus on racial justice while building power across an ideologically diverse base. For WE organizer "Carolyn Green," the "strategic" question as they plan these campaigns is the following: "how does an insurgent caucus with a racial justice vision organize a base – organize and politically develop a base – with varying political and ideological beliefs, some that are racist and classist?" (personal communication, March 16, 2019). WE caucus members recently used a petition for the district to improve its "toxic schools" to reach out to their entire membership and test their organizing structure (C. Green,

personal communication, March 16, 2019). However, they have also continued their ongoing racial justice work, with several caucus members serving as lead organizers in the second national Black Lives Matter Week of Action.

Similarly, the West Virginia Public Employees United and Arizona Educators United networks are strong examples of how educators can lead broadening campaigns before they formalize or "coalesce" their caucus. Educators in both networks drew from the lessons of the 2012 Chicago educators' strike to develop campaigns that appealed to educators across their states regardless of union membership. As Jay O'Neal of West Virginia and Noah Karvelis of Arizona noted in interviews, key organizers in these struggles studied Labor Notes and Chicago educators' *How to Jump Start Your Union*, developing campaigns that integrated broadening strategies such as developing demands that unite your membership, developing an organizing structure, and using escalating actions with structure tests to build toward a strike (N. Karvelis, personal communication, May 15, 2019; J. O'Neal, personal communication, May 8, 2019). Both campaigns likewise included political education strategies to engage their entire union's membership, including leaders in locals. Former CTU educator Rebecca Garelli of the Arizona Educators United network posted remarkable videos to the network's groups and pages, teaching her fellow educators how to engage in such tactics as walk-ins and car-painting (R. Garelli, personal communication, May 5, 2019).

As caucuses institutionalize, they often engage in the practices associated with the broadening phase to develop campaigns that engage their entire membership, albeit with more institutional resources generally available for these campaigns. Campaigns in this phase often include escalating actions and structure tests that may lead to a strike. These

campaigns may differ from those of broadening caucuses in the legal limitations faced by social justice unions as they build toward a strike, including policies around collective bargaining and arbitration.

Upon winning elected leadership positions in their unions, organizers in such caucuses as CORE, EDU, and UP developed campaigns that engaged their entire union membership. As McAlevey demonstrates in her discussion of Chicago educators in *No Shortcuts,* CORE and the CTU's organizing in advance of their 2012 strike is a clear example of what I call the institutionalizing phase of caucus campaign development. The four-year process that UP and UTLA organizers engaged in to prepare for the Los Angeles educators' strike is another example of a campaign development, with discrete campaigns around union dues, membership, and issue identification building up to the contract campaign (field notes, April 13, 2019). As discussed further in the next section, community alliances are key to campaign development at all phases of caucus development, including as caucuses institutionalize. In their No on 2 campaign, for example, EDU organizers in the MTA worked with a coalition that included such groups as the American Federation of Labor–Congress of Industrial Organizations (AFL-CIO), the AFT, the Boston Teachers Union, the National Association for the Advancement of Colored People (NAACP), and parent and community organizations to stop privatizers from lifting the cap on charter schools in the state (B. Madeloni, personal communication, June 7, 2019).

Linking struggles with community organizations, caucuses, and broader networks.

Solidarity is a central principle within caucus organizing and the labor movement as a whole, as I discuss in Chapter 7. In many cases, caucuses practice solidarity by linking their own struggles with those of students, parents, community members, and other educators. They likewise practice solidarity by working in collaboration with other community or labor organizations in their own contexts, as well as broader networks of educators and organizers. The practice of linking struggles is deeply relational, exemplifying the affective dimensions and "cultural logic of networking" (Juris, 2008) of caucus organizing.

As caucuses emerge, organizers often work closely with organizers in their own and, occasionally, other contexts. In some cases, caucuses may be born out of struggles led by broader communities or networks. CORE and SEE grew out of educators working in solidarity with communities of color organizing against school closures, for example (see Stark and Maton, 2019). O2020 likewise grew out of connections between educators engaged in the Moral Monday movement (B. Proffitt, personal communication, April 16, 2016). Emergent caucuses also sometimes form out of existing grassroots educator networks, such as Teacher Action Group (TAG) in Philadelphia, which brought together the founders of the WE caucus (K. Luebbert, personal communication, March 1, 2019). Likewise, many emerging caucuses develop in part through connections with broader networks such as Labor Notes and UCORE. As they were emerging, caucuses such as AlbuCORE, BMORE, and WE collaborated with organizers in more established caucuses such as CORE to determine the role a caucus might play in their own local struggles, for

example (F. Bluher, personal communication, November 18, 2015; D. Pope, personal communication, February 11, 2019; C. Green, personal communication, March 16, 2019).

As caucuses coalesce and develop a wider range of campaigns, this presents the opportunity for additional connections with both local community organizations and broader networks of organizers. This can include caucuses collaborating with community networks for campaigns or showing solidarity with local or distant struggles for democracy and justice. By linking their own struggles to those of others, organizers can build deeper connections and share with educators, unionists, and community members in their own and other contexts. Many caucuses offer formal opportunities for community members and allies to collaborate in their work, including allowing full or supporting membership to people from these groups.

In their work, for example, organizers in the SEE caucus in Seattle collaborated with both local and national networks to develop the first Black Lives Matter at School Day of Action and subsequent national weeks of action. On the local level, they worked with educators at John Muir Elementary School, grassroots organizers in Black Men United to Change the Narrative, civil rights leaders in the King County NAACP, union leaders in the Seattle Education Association Center for Racial Equity, and progressive district leaders coordinating the Seattle Public Schools Ethnic Studies program. They then went on to collaborate with educators and organizers nationwide on the first and second annual national Black Lives Matter weeks of action, including the WE caucus in the UCORE network.

When caucuses broaden and expand their base, they often develop formal structures or networks to bring local community organizations, parents, students, or other allies into their work. They may develop extensive partnerships in way that is similar to organizations that are coalescing. As their capacity expands, however, caucuses are likely to more extensively draw on these partnerships for a wider range of initiatives and programming. Unlike caucuses in the institutionalizing phase, however, they are less likely to be able to draw on the institutional resources of the union to support this work.

For example, educators in Philadelphia's Caucus of Working Educators worked in collaboration with a range of both local and national allies and networks on the first local Black Lives Matter Week of Action, which was inspired by the organizing in Seattle. Caucus educators collaborated with such local organizations and groups as Parents United for Public Education, the Philadelphia Home and School Association, UrbEd, the Philadelphia Writing Project, PhillyCAM, parents and students at their schools, and long-standing allies such as the Philadelphia Student Union (PSU) and the Teacher Activist Group (TAG) to develop at least one event that engages the local community per day, along with daily curricula (WE, 2018). They have also collaborated with other caucuses such as SEE on this campaign and through the UCORE network.

As caucuses institutionalize, winning elected union positions, they generally continue these practices, developing even more formal structures for linking struggles with other groups and organizations. These may include union-community coalitions, open or community bargaining structures such as Bargaining for the Common Good, or formal national networks such as UCORE. They may also include formal union positions to support this work. In an important distinction from the broadening phase, organizers in

institutionalizing caucuses may use their more extensive institutional resources to bring together these coalitions or networks and to create these positions.

While the case of Caucus of Rank-and-File Educators' (CORE) educators' organizing in advance of the Chicago Teachers Union (CTU) 2012 strike is well-known (see Uetricht, 2014), the Union Power caucus's work both before and after winning elected leadership positions in the United Teachers- Los Angeles (UTLA) union is another strong example of broadening organizing through community collaborations. Before winning elected leadership positions in their union, Union Power organizers linked educators' struggles to those of students and community members, developing a campaign and coalition for the Schools LA Students Deserve, working with students, parents, and educators to develop a vision statement in 2013. In doing so, they built on lessons from CORE and the CTU, as well as social justice unions such as the St. Paul Federation of Teachers. They continued their campaign for the Schools LA Students Deserve after winning elected leadership of the union in 2014. This included collaborating to develop Reclaim Our Schools LA coalition and developing a new Parent Community Organizer position in UTLA to continue to develop this work (A. Inouye, personal communication, August 7, 2015). As they entered bargaining, UTLA leaders developed a platform for "bargaining for the schools LA students deserve" (UTLA, 2017) and "brought twelve community partners to the table" (field notes, September 24, 2018). Through these community coalitions – and building on the lessons of fellow organizers in the UCORE network – Union Power organizers led a successful strike for common good demands in 2019 (G. Russom, personal communication, May 13, 2019).

Reflecting on organizing successes and shortcomings.

Throughout my time researching organizing in the UCORE network, I have found caucus educators to be deeply reflective about their own practices, often discussing the relative successes of their work in relation to their principles and goals. In this way, there are few critiques of caucus organizing that I could offer that have no already been widely discussed by organizers themselves. Caucus organizers frequently reflect both formally and informally on their work, whether it be a single meeting or a long-running campaign.

As new caucuses emerge, caucus organizers generally reflect on their campaigns and growth just as much as more experienced organizers might. However, as some organizers may in some cases have less political or organizing experience, and new caucuses may not have a formal mission statement or goals, they may have less points of reference for evaluating their work. They also may not have formal mechanisms for reflecting on the success of their organizing through meetings or surveys. Moreover, emerging caucuses may not have established norms and recruitment programs to ensure that educators and allies of color are able to feel comfortable offering critiques of their collective work in caucus spaces. That said, as educators are generally trained in reflective praxis, educators tend to reflect collectively on their work through all phases of caucus organizing.

Leaders in the newly formed West Virginia United caucus have reflected deeply on the role of the caucus as opposed to the WVPEU network, for example. They have also reflected on the successes they have had so far as a new caucus, including leading the State of the State walk-ins in 2019 and furthering both educators' and union leaders' political education around charterization and privatization (N. McCormick, personal

communication, April 16, 2019; J. O'Neal, personal communication, May 8, 2019). Through their connections to organizers in other contexts, they are able to share these reflections and support other organizers as they engage in similar work, much as the reflections of CTU organizers has supported organizers hoping to replicate their success in other contexts.

As they coalesce, caucuses generally dedicate part of their formal meetings to evaluating the success of their work. They may set aside this time after major campaigns, following large events and union meetings, at the end of the academic year, and during steering committee retreats and caucus conventions. As caucuses develop more formal mission statements and principles, this offers them a reference point for evaluating their own work.

The Social Equity Educators caucus in Seattle, for example, frequently includes a space on the agenda for reflections on the caucus's work. At a meeting following a significant SEA Representative Assembly when caucus organizers presented New Business Items (NBIs) for the first national Black Lives Matter at School week and a Bargaining for the Common Good negotiations model, organizers reflected on why the former NBI might have passed while the latter did not. In reflecting on the NBI, organizers alluded to the caucus's points of unity, in particular its focus on democracy, racial justice, and engagement in social movements. One organizer noted that the passage of the Black Lives Matter at School NBI was a major victory for the movement nationwide and shows how the caucus has been able to "change who the union works in a bigger way" by "fusing social movements and unions together." In reflecting on the failure of the bargaining NBI, caucus organizers noted how language changes might have

clarified the purpose of the NBI, while also arguing that even though the motion failed it was successful in raising the importance of union democracy and bringing out like-minded educators who might join them in this work (field notes, December 17, 2017).

As caucuses broaden to organize a wider base, core organizers will often continue to engage in processes of reflection and debate among themselves. In many cases, by developing a formal organizing structure and using this structure to engage as much of the membership as possible in measurable actions, organizers will be better able to assess the success of their organizing through what McAlevy calls "structure tests" (p. 34). Conversely, it can be more of a challenge to share these reflections with a wider base that they are trying to mobilize, especially given the political importance of elections for building members' power within a social justice unionism model.

Within caucuses that have not won leadership positions in their union, organizers often evaluate whether their current or former campaigns successfully built power across the entire union. For example, as the WE caucus prepared for another election, organizer Carolyn Green considered whether evaluated whether they were "building power" across their union through their previous campaigns or only engaging like-minded educators. Through this analysis, Green considered who the targets of these campaigns were, noting that current campaigns were targeting the school district and city council, rather than the union leadership (C. Green, personal communication, March 16, 2019).

As caucuses institutionalize their goals upon winning elected leadership positions, they may experience additional barriers – both internal and external – to sharing their reflections with other caucus members and the union membership as a whole. Organizers elected to leadership positions may debate whether it is appropriate to share critical

reflections on their own with their union's membership, for example, or with the public as a whole. They may conversely share these reflections with organizers in other contexts who are hoping to replicate or learn from their work, enabling them to avoid common pitfalls in this organizing.

Within caucuses that have won leadership positions in their union, such as CORE, Classroom Struggle, and Union Power, organizers may reflect on how elected leaders have actualized the caucus's principles while in leadership, including whether there have been sufficient spaces for democratic reflection and debate. Several experienced caucus organizers have noted that they need to grow more comfortable with sharing their regrets or critiques of their own work with their wider base or membership once they gain leadership positions. Likewise, some caucus members active in social justice unions have noted that they would like to see their elected representatives in those unions more openly engage in discussions with their fellow caucus members about their relative successes and shortcomings.

Summary and Discussion

Social justice organizers engage in a series of cultural practices to build the power necessary to democratically transform their unions, schools, and broader society. These practices include the ten cultural practices of social justice caucus organizing that I have identified in my research alongside UCORE educators between 2015 and 2019: 1) connecting with other educators; 2) gathering together; 3) sharing stories and resources; 4) engaging in dialogue; 5) identifying issues; 6) developing norms; 7) forging a collective identity; 8) leading campaigns; 9) linking struggles; and 10) reflecting on organizing. As I have discussed in this chapter, these practices vary across five iterative

phases of caucus development: emerging, coalescing, broadening, institutionalizing, and fragmenting.

Through this discussion, I have built on a number of arguments in the literature on how educators, unionists, and social movement organizers effect change. Building on the educational studies literature, I have shown the specific cultural practices that social justice *educators* in social justice caucuses use to transform their schools, unions, and communities. I have likewise highlighted the importance of “decentered unities” (Apple, 2013) in how organizers in social justice caucuses forge collective identities, including why educators instead decide to “center” their work on a single principle such as racial justice. Moreover, I have revealed how social justice caucus educators engage in the core cultural practices of problem-posing education in critical pedagogy through these same ten practices (Freire, 1970; Wallerstein, 1983). As I have discussed, the caucus cultural practice of “sharing [and, in turn, listening to] stories and resources” aligns closely with the practice of “listening,” the caucus cultural practice of “engaging in dialogue and debate” aligns closely with the critical pedagogy practice of “dialogue,” and the caucus cultural practice of “developing campaigns” aligns closely with the critical pedagogy practice of “action,” for example (see Wallerstein, 1983).

Building on the labor studies literature, I have outlined the specific cultural practices that social justice *unionists* use to transform their unions and, in turn, their schools and communities. In particular, I have discussed the practices that characterize the work of educators in social justice caucuses and how this relates to the broader tradition of social justice unionism or social movement unionism (Weiner, 2012). In

doing so, I suggest the potential for militant ethnographic research on social justice unionism as both a caucus organizer and a union member (Juris, 2008).

Building on the social movement studies literature, I have explored the specific cultural practices that *organizers* use within the developing contemporary educator movements. Many of these practices overlap with cultural studies on social movements, including work on emotional and narrative processes within social movement organizing (Goodwin, Jasper, & Polletta, 2001; Polletta, 2006). This includes showing how educators' cultural practices prefigure the transformation they are organizing for, showing the potential for collaborations across difference, expressly counter-hegemonic caucus norms, and organizing to build movements that bring together educators, unionists, students, parents, community members, and other allies. Likewise, in focusing on caucuses in the UCORE network, this study highlights what Juris (2008) calls the "cultural logic of networking" in social movement organizing (p. 1).

While this chapter contributes to each of these traditions, it also points to areas where future research is needed. This includes a deeper analysis of the links between critical pedagogy and social justice unionism, additional case studies of social justice caucuses and unions in specific contexts (rather than across an entire network), and further considerations of the social movement dimensions of caucus organizing. In future work, I plan to explore these and other themes, further exploring how UCORE members are changing schools, unions, and society.

CHAPTER 9: Policy Mobility Across the UCORE Network

> "*What happened in Seattle showed that educators have an important role to play in the movement for Black lives. When they rise up across the country to join this movement — both inside the school and outside on the streets — institutions of racism can be challenged in the search for solidarity, healing, and justice.*" (Hagopian & Au, 2017)

> *"The Caucus of Working Educators (WE) saw our chance to bring that spirit to Philadelphia. But we knew our action would have to go beyond the hashtag, pushing educators, parents, and students into an honest and difficult dialogue."* (Anderson & Cohen, 2017)

Cultural Practices and Policy Mobility in Black Lives Matter at School

Three weeks into the 2017-2018 school year, Seattle's Social Equity Educators (SEE)[1] came together to plan for their next union meeting in a small multi-purpose room in a library in South Seattle (field notes, September 18, 2017). As a social justice caucus of educators active in the Seattle Education Association, this group holds monthly meetings to plan actions to advocate for justice within and through their teachers' union. At this particular meeting, the Social Equity Educators had invited educators from John Muir Elementary School, a Seattle school that had recently received bomb threats for planning a morning event that declared that #blacklivesmatter at their school.

For the educators leading this meeting, it was important to offer solidarity to the educators at John Muir and their collaborators in the grassroots organization Black Men

[1] The caucus went by Social Equality Educators until the general membership voted to change the organization's name to Social Equity Educators on September 24, 2017, but I am using the caucus's current name throughout this dissertation for clarity.

United to Change the Narrative (BMUCN), writing letters in support of the principals at John Muir and other schools that had been threatened. Leaders within the SEE caucus also hoped to use this moment as an opportunity to build support for the broader movement for Black lives within Seattle schools. As one of the meeting's presenters noted, the recent organizing of educators and BMUCN at John Muir was an example of "struggles across the country," such as a recent prison strike in Delaware and the decision of football players at Seattle's Garfield High School to take the knee during their football game. For this organizer, there existed a possibility to "get the union behind a larger action" that is "city-wide" (field notes, September 18, 2016).

Through conversations at Social Equity Educators' September and October meetings, the caucus developed a plan for leading a "city-wide" day advocating for "Black Lives Matter in schools" on October 19th, 2016 (field notes, September 18, 2016). This day of action would have three demands: implementing restorative justice and ethnic studies programs in every school and ending tracking. In an article in the SEE *Educators' Vision* newsletter on the day of action, organizers noted that the caucus "will be working with community groups, racial justice organizations, activists, parents, and students to further develop these demands for racial justice and develop an activist campaign to achieve them" (SEE, 2016). To highlight the importance of Black Lives Matter and these demands, organizers drafted a statement about the purpose of the day, held school-based conversations that acknowledged potential repercussions from the far right, developed lesson plans that could be used that day and in the weeks to follow, designed two shirts inspired by the Muir educators' Black Lives Matter shirt, planned an evening rally featuring students and racial justice leaders from across the city, and

organized to engage educators at each school (field notes, September 18, 2016; field notes, October 9, 2016). The caucus also discussed the challenges and significance of getting the full union to endorse the action, agreeing to present two New Business Items or motions at the next union meeting: one supporting the John Muir educators and one calling for a district-wide day of action for Black lives on October 19th, 2016. Both motions passed with considerable support from the union's Area Representatives (ARs) (field notes, October 9, 2016).

In preparation for the October action, educators at elementary and middle schools in the district developed model lesson plans for their grade levels, working with the union leadership to create a resource list for teaching Black Lives Matter and racial justice in schools. At the high school where I have served as a union representative, educators on the Racial Equity team collaborated to develop a high school lesson plan for teaching about the Black Lives Matter movement as an important historical moment, and this plan was shared and taught at schools across the district. Educators further discussed the purpose of the action with students, who in turn planned a "blackout," with students coordinating to wear black on the same day. In addition to ordering shirts from the caucus, educators created their own shirts in advisory classes, and one freshman advisory decided to create a social justice organizing club to prepare for future actions (field notes, November 6, 2016). At an elementary school in West Seattle, educators greeted students with a "Black Lives Matter" sign and taught lessons that included reading and analyzing bell hooks' *Skin Again* (Dornfeld, 2016).

In the weeks that followed this action, educators from across the state and country reached out to SEE organizers to discuss how they could develop similar actions within

their schools. Organizers in Philadelphia's Caucus of Working Educators (WE) caucus spoke with SEE representatives on the phone and discussed how to develop a campaign "inspired by Seattle" (field notes, August 5, 2017). Likewise, on the November UCORE network call, a member of the WE caucus in Philadelphia noted that she had worn a Black Lives Matter shirt to school and been asked to take it off (field notes, November 13, 2016). Within the Seattle region, Bellevue educators developed a related action for January 31st, 2017, in which they led courageous conversations about racial justice and wore t-shirts that read, "I stand for and with all my students who are targeted due to their race, gender, orientation, immigration status and or religion" (KIRO, 2017).

Building on their conversations with SEE educators, organizers in Philadelphia's WE caucus developed a full Black Lives Matter Week of Action that same month. While this action was inspired by the day-long action in Seattle, it must also be understood as a result of the caucus's long-standing focus and in-depth work on racial justice, which is well-documented in the participatory research of WE caucus member and activist scholar Rhiannon Maton (Maton, 2016a; Maton, 2016b; Maton, 2018) as well as in public scholarship written by other caucus organizers. In this weeklong action, Philadelphia educators developed curricula related to the 13 guiding principles of Black Lives Matter, planned evening panels and community discussions related to racial justice, and organized to wear t-shirts and buttons (field notes, August 5, 2017). For organizers in the WE caucus, this represented an opportunity to support racial justice as well as develop leadership within their caucus (C. Green, personal communication, March 16, 2019). SEE organizer Jesse Hagopian noted that Philadelphia educators "took it to the next level because they took it from the day of action and expanded it to a full week of action, and

they broke down the 13 principles of the Black Lives Matter Global Network in the teaching points for each day of the week. And that was really amazing" (J. Hagopian, personal communication, May 9, 2019).

That summer, organizers in the SEE and WE caucuses shared stories from their organizing in additional networks and public scholarship. In May, WE members Tamara Anderson and Shira Cohen published an article on the Labor Notes blog sharing the story of "How Black Lives Matter Came to Philadelphia's Schools" (Anderson & Cohen, 2017). In this article, they discussed the goal of their week of action, stories from how they planned it, and strategies they used to engage educators, students, and community members throughout their city in the event.

In July, at the 2017 biannual Free Minds Free People conference in Baltimore, Kendra Brooks, Shira Cohen, Kelley Collings, Ismael Jimenez, and Shaw MacQueen from the WE caucus led a workshop titled "Organizing a Black Lives Matter Week of Action." In that workshop, they focused on "grounding our organizing work in racial justice; how the Caucus organized the Black Lives Matter Week of Action; and [how to] create space for participants to organize their own work in and beyond their schools in the coming year" (Free Minds, Free People, 2017). During the workshop, an organizer from the MORE caucus in New York suggested planning a single national Black Lives Matter Week of Action for 2018 (C. Green, personal communication, March 16, 2019). In August, representatives from the SEE and WE caucuses spoke on a panel at the 2017 UCORE conference titled "Fighting for Racial Justice." On this panel, organizers shared stories, strategies, and resources from their respective campaigns. After the panel, organizers from these and other caucuses discussed the possibility of a national Black

Lives Matter Week of Action and exchanged contact information (field notes, August 5, 2017). In the fall of 2017, SEE founder and key Black Lives Matter at School organizer Jesse Hagopian co-wrote an article in Rethinking Schools with his fellow editor Wayne Au detailing the history of the first Black Lives Matter at School Day of Action (Hagopian & Au, 2017).

In January of 2018, organizers from caucuses across the country discussed the plans they had developed for the upcoming first annual national Black Lives Matter Week of Action. An educator in Baltimore's Movement of Rank-and-File Educators (BMORE) caucus discussed two events they had planned for the week of action, including one they had learned from the WE caucus: a "soup" event where educators would present #BlackLivesMatter themed projects. Likewise, an organizer in the statewide New Jersey Caucus of Rank-and-File Educators (NJCORE) network discussed events that would take place throughout their city, as well as a statewide culminating event they had planned for a Saturday (field notes, January 7, 2018)

By the second national Black Lives Matter at School week in 2019, the campaign had spread to over thirty cities. Reflecting on the growth of the Black Lives Matter at School movement across the country, SEE founder Jesse Hagopian highlighted how it connected to the purpose of social justice caucus organizing:

> [I]t's really been an amazing example of grassroots education, transformation from educators, students, and parents across the country, who are reclaiming our schools, and fighting against corporate education reform and institutional racism. And that you know over 30 cities participated this year with many, you know, thousands of teachers and tens of thousands of students getting lessons about intersectional Black identities and Black social movements against racism, and just so many things that are left out of the master narrative corporate education textbooks. So it's really been an inspiring movement and I think a

> testament to building social justice caucuses. (J. Hagopian, personal communication, May 9, 2019)

Indeed, this campaign represents the profound potential for social justice caucus organizing to transform schools in the United States, and through them, society as a whole.

The development of the Black Lives Matter at School organizing in Seattle can be seen as one example of the cultural practices of social justice caucus organizing outlined in the previous chapter. As Seattle educators organized the first Black Lives Matter day of action, they connected with educators and organizers from John Muir and BMUCN, gathered together to share stories and strategies, identified issues related to the John Muir event, and planned a campaign to advance racial justice in Seattle schools.

This development also highlights the ways that these same cultural practices were used to build a movement that goes far beyond a single caucus's organizing, however. Using many of the same cultural practices that I identify in my research on caucus organizing, educators across the UCORE network connected with peers in other contexts, gathered together both virtually and in person to share stories and strategies, engaged in dialogue about their respective organizing, and linked their struggles together to show solidarity and build a broader movement. Through these practices, the Black Lives Matter at School campaign strategy spread across the country, up until the point where it was in over thirty cities (J. Hagopian, personal communication, May 9, 2019).

Purpose

This story therefore suggests how the cultural practices that characterize social justice caucus organizing in turn facilitate the spread of social justice unionist policies and practices. Over the course of my time as an organizer and researcher in the UCORE

network, I have witnessed – and, at times, facilitated – the spread of a wide range of social justice unionist policies and practices. These include anti-corporate reform campaigns challenging charterization and testing; bargaining policies such as Bargaining for the Common Good and open bargaining; contract campaign policies such as caucus-led demand development, contract reading sessions, and "no vote" campaigns; collective actions such as days of action, walk-ins, and wildcat strikes; community engagement and visioning processes such as the Schools Our Students Deserve coalitions and reports; inquiry and learning processes such as summer book groups; norms such as by-laws, caucus t-shirts, decision-making processes, facilitation processes, membership tiers, and mission and vision statements; racial justice-focused campaigns such as Black Lives Matter at School and Ethnic Studies Now; school condition campaigns such as Heal Our Schools; statewide social media-hosted networks such as Arizona Educators Unite and WA State Educators Unite. This is by no means a complete list, but rather a suggestion of the complexity of caucus organizing, including the continuous process of learning and adaptation as well as the scope of knowledge production and dissemination across the network.

In this chapter, I will discuss how the following six practices outlined in the previous chapter facilitate the movement of counter-hegemonic policies between caucuses in the UCORE network: connecting with other educators, gathering together, sharing stories and resources, engaging in dialogue, developing norms, and linking struggles. In doing so, I will discuss how these findings relate with the policy studies and social movement studies literatures, as well as what they suggest about the future of these literatures and contemporary educator movements. I will also contribute to both academic

and activist analyses of how democracy- and justice-oriented policies spread across grassroots labor organizations and the communities they serve.

Conceptual Framework

As I discussed in the literature review in Chapter 3, the policy studies and social movement literatures offer useful conceptual frameworks for understanding counter-hegemonic policy networks like UCORE. Within the traditional policy studies literature, scholars offer the frameworks of policy diffusion (Berry & Berry, 1990), policy learning (Rose, 1991) and policy transfer (Weyland, 2007) to explore how policy actors borrow, imitate, or learn from policies in other contexts. Of these traditions, the policy learning literature is most applicable to my research on the UCORE network, as it emphasizes the extent to which policy actors adapt policies to their own contexts. Within the critical policy studies literature, scholars have advanced the alternative frameworks of policy mobility (McCann & Ward, 2011; Peck, 2011) and fast policy (Peck & Theodore, 2015), which emphasize the role of culture, power, and relationships in the movement of policy. In this literature, critical education policy researchers have demonstrated the importance of networks in the spread of neoliberal policies. Moreover, within the social movement studies literature, scholars emphasize the importance of networks in the development of social movements (della Porta & Diani, 2006; Knoke & Wisely, 1990). They also discuss the role that networks play in the development of relationships and the spread of tactics in social movements (Andrews & Biggs, 2006; Wang & Soule, 2012). Together, these frameworks help us understand the importance of the UCORE network in the movement of counter-hegemonic policies between social justice caucuses in the United States.

While many researchers have documented the development of neoliberal policy networks in education, few have explored the work of counter-hegemonic networks such as UCORE. Likewise, while many scholars have discussed the importance of networks in the spread of policies and social movement tactics, few studies have applied these insights to the study of educators' networks and social movements. In this chapter, I am addressing these gaps by tracing policy mobility in the UCORE network using the methodology of militant ethnography. The central question I am considering within this chapter is the following: How do cultural practices, strategies, and tactics move between UCORE caucuses? To explore these questions, I have documented the work of caucuses throughout the UCORE network using traditional ethnographic methods, which include participatory observation, document analysis, and interviews. In my fieldwork answering this question, I have been particularly interested in the spaces – both concrete and virtual – that bring together organizers from distant member caucuses. With this in mind, I will draw largely on my interviews with organizers throughout the UCORE network as well as my field work in network meetings and conferences for this chapter.

Findings

Connecting with other educators.

From the first workshops I attended featuring caucus educators, I was struck by the affective and relational dimensions of organizing in the UCORE network (field notes, March 22, 2015; field notes, April 25, 2015). Organizers frequently speak of their genuine love for each other, and the network fosters strong, intergenerational, multiracial friendships between educator unionists with wide ranges of organizing experience (field notes, February 27, 2016; field notes, November 12, 2017). In some cases, these

relationships grow out of organizing experiences outside of the UCORE network. As detailed in Chapter 2, the network developed through connections between educators who had met at labor conferences such as Labor Notes and the Trinational Convention as well as through grassroots educator networks such as Save Our Schools and Free Minds, Free People (A. Heenan, personal communication, May 30, 2015; A. Inouye, personal communication, August 7, 2015; M. Gunderson, personal communication, August 28, 2015). As a CORE organizer noted at the 2015 UCORE conference, many of these connections grew in the wake of the 2012 Chicago educators' strike: "[B]eing asked to go around the country, we started making a lot of connections. My connections were through the Opt-Out movement" (field notes, August 9, 2015).

As the UCORE network has formalized and grown, many of these connections and relationships developed over the course of meetings, conferences, social media connections, and informal support calls and visits with organizers from Labor Notes and the UCORE network. As the same member of CORE noted at a panel on caucus organizing at the United Opt Out conference in Philadelphia in 2017, UCORE includes "a group of people willing and ready to come and meet with you and have cups of coffee" (field notes, February 28, 2017). These informal meetings and calls have been crucial to the development of the network, with organizers from CORE and Labor Notes in particular developing relationships with organizers in struggles across the country and supporting them as they consider developing a caucus and engaging in UCORE. This process has continued into the educator uprisings of 2018 and 2019, with network organizers developing strong relationships with leaders in the red state strikes and offering support throughout their organizing. In turn, through these connections and

UCORE calls, organizers in urban districts have developed relationships with these organizers, learning from and adapting their organizing strategies to struggles in their own contexts.

In many ways, I have found that relationships across the UCORE network mirror those within the caucuses I have studied. Organizers support each other's work, frequently expressing solidarity and admiration, as detailed in the section on linking struggles below. They likewise see their relationships with other caucus organizers as restorative. As a CORE organizer noted, the relationships between caucus organizers are central to their work. For her, it's important to "be fully present" instead of "having a really shallow relationship" with other educators and organizers. She also highlighted how these relationships help UCORE members to recover from being in a "constant state of resistance" in their collective work as organizers and educators. She further highlights the importance of these relationships being supportive and caring rather than competitive: "We can't be struggling with each other. We have to build each other up" (field notes, February 28, 2017). This correlates with Stern and Brown's (2016) findings on the restorative role of relationships between caucus organizers in the WE caucus in Philadelphia.

Through these connections and supportive relationships, the UCORE network has grown, fostering the development of new social justice caucuses in cities and states across the country. As detailed below, this has allowed educators from very different contexts to gather together, share strategies and stories from their own contexts, learn from each other through a Freirean praxis of dialogue, and mindfully adapt the strategies they have learned to their own context.

Gathering together.

A key element of the UCORE network's work is creating spaces for educators to gather together and learn from each other. These include both informal and formal spaces for educators to gather in person, including annual national conferences; regional conferences; educator union section meetings, educator and cross-sector workshops, preconference UCORE meetings, and socials at the Labor Notes conference; workshops, informal gatherings, and socials coordinated to coincide with national union meetings and grassroots conferences; and both formal and informal meetings to offer strategic support. In an analytic memo written at the UCORE conference on August 7, 2015, I remarked on how the culture of both formal and informal network spaces mirror the principles outlined in Chapter 7:

> The atmosphere at the alehouse typified the relational dimensions of caucus organizing I'd noticed in other fieldwork. Representatives from caucuses and locals across the country were talking, strategizing, and mostly just having fun together with a great level of comfort and joy. Even as an outsider, not currently active in a caucus, I was warmly welcomed to join the dancing and conversations with organizers.
>
> Another element that stood out was the democracy of the event. New caucus members and experienced organizers danced alongside statewide and citywide union presidents, with a strong sense of solidarity and affection. For a good part of the evening, there were two parallel dance lines, with organizers encouraged to dance between the lines as onlookers encouraged them, saying "Go [City]!" (For example, "Go, Newark!")

This is also the case in virtual network meetings, when organizers meet both formally and informally. These include social media forums such as the UCORE Facebook group; strategy calls to support caucuses with a particular challenge or campaign; and monthly network and steering calls, which use the Zoom platform to create a space where

educators using the application can see each other and share stories and resources from their work.

In my analysis of these spaces and the role they play in the network, I consider them to be what Fraser (1990) terms “subaltern counterpublics” (p. 67). For Fraser, subaltern counterpublics fulfill two important functions: “On the one hand, they function as spaces of withdrawal and regroupment; on the other hand, they also function as bases and training grounds for agitational activities directed toward wider publics” (p. 68). For Fraser, the “emancipatory potential” of subaltern counterpublics lies in the “dialectic between these two functions” (p. 68). As detailed in the previous section on educators’ connections and relationships, the UCORE network creates spaces that serve this first function by allowing educators engaged in struggles across the country to seek support and refuge from each other, learning from their own and others’ struggles. Likewise, as I will detail in the next sections on sharing stories and resources and engaging in dialogue, the network creates spaces that serve this second function by building a national base of caucus organizers and supporting their development through a learning praxis that resembles Freirean problem-posing education. Through their learning in the UCORE network and other spaces, organizers gain skills and insights to fuel their organizing in struggles in “wider publics,” including their own contexts.

Sharing stories and resources.

Within the various counterpublics described above, UCORE organizers frequently share stories from their own contexts and struggles. Indeed, this was one of the first themes I identified in my pilot research on educator organizing in 2014-2015, and I have found storytelling to be an essential component of learning in UCORE throughout the

over three hundred hours I have spent in field work in this network. At the annual UCORE conferences, workshops are frequently structured around themes, with panelists sharing stories from their contexts related to these themes and participants engaging in dialogue around these stories and their own related experiences (field notes, 7 August 2015; field notes, 6 August 2016; field notes, 5 August 2017). Likewise, on the monthly UCORE network Zoom meetings, participants generally begin with narrative updates from their own contexts, and every call features one or two caucuses, with representatives sharing stories that center challenges and strategies from their work (field notes, September 24, 2017; field notes, April 29, 2018; field notes, December 2, 2018.) Within these spaces, it is important to note that storytelling is not only for catharsis or "detoxification," but rather serves the purpose of identifying problems that can be solved (E. David Friedman, personal communication, May 21, 2019). For more on this idea, see the practice of "identifying issues" in Chapter 8.

Outside of official network spaces, organizers also share their stories in social media posts and public scholarship, including articles in *Labor Notes* and leftist and grassroots publications. SEE organizer Darrin Hoop, for example, has conducted and shared insightful oral history interviews with educators leading struggles in the red states through the *Socialist Worker* newspaper, reprinting excerpts from many of these interviews in the SEE caucus newsletter, *Educators' Vision.* Likewise, members of the CORE caucus collaborated with journalists and organizers to share their stories in such venues as Jacobin's *Class Action* (Gude & Sunkara, 2014) and Labor Notes' *How to Jump-Start Your Union* (Bradbury et al., 2014). As a CORE member noted at the 2015

conference, organizers shared their story with the intention that it would be interpreted by educators in other contexts:

> And after the strike happened, many of us inside CORE were being asked to go speak all over the country, and we made a real determined effort not to talk at people but also listen and form relationships and talk about our context but never give people a blueprint about it. When we talk in *How to Jump-Start Your Union*, when we talk inside this book, I hope that's the narrative you hear. That this was our story and it was our context, and you take from it what you learn from it and build your own (field notes, August 9, 2015).

This organizer therefore encouraged a process that might be compared to policy learning in the traditional policy studies literature (Rose, 1991), with the emphasis on context and adaptation associated with fast policy in the critical policy studies literature (Peck & Theodore, 2015).

As this educator argues, organizers in the UCORE network often offer detailed contextual background when they share stories and strategies so that organizers can interpret and thoughtfully adapt them, if appropriate, to their own contexts. Likewise, through the process of dialogue discussed below, organizers are able to better understand each other's challenges and collectively develop strategies that are appropriate to unique contexts. Moreover, these stories serve an affective and transformative function, helping organizers to understand that they are in interrelated struggles and that they have the power to engage in these struggles in new ways in their own contexts. An organizer in the EDU caucus in Massachusetts expressed this potential at the teacher sector meeting of the Labor Notes conference: "When we tell each other stories of what they're dealing with and how we're dealing with it, it changes us – gives us a sense of possibility" (field notes, April 2, 2016). Likewise, an organizer from the Organize 2020 caucus in North Carolina discussed how they were changed by the stories they heard among educators at Labor

Notes after an informal UCORE gathering, and how he uses these stories in his own organizing: "[We] went on into Labor Notes and just saw, you know, people that were sharing in some of the sessions, with some of the most inspiring stories of stuff that was going on across the country, some of the stuff that the Portland Student Union and work that CORE had done in organizing parents and the work that St. Paul was doing – is things that I still talk about every day in my organizing in North Carolina" (field notes, August 9, 2015).

These findings align with frameworks put forth by Polletta (1998a, 1998b), Davis (2002), and other social movement scholars for understanding the importance of narrative processes within social movements. They also align with the way storytelling is discussed in the literature around knowledge production in social movements by scholars such as Cox (2014). For Polletta (1998a), storytelling serves important functions in bringing new organizers into social movements, helping organizers understand and recover from setbacks, and facilitating movement outcomes such as policy changes (p. 419). She further argues that storytelling can capture the imagination through "emplotment" and "ambiguity" (p. 139). Davis (2002) likewise argues that stories enable organizers to create, make, alter, and spread collective meanings and experiences. Cox (2014) further discusses how stories can serve to share knowledge among movement organizers, as demonstrated with the case of the Irish Grassroots Gathering Process. Each of these arguments align with the complex ways I have seen stories used throughout my time in the UCORE network. As I have discussed, narrative processes serve affective, pedagogical, strategic, and transformative functions, facilitating the growth of the UCORE network and the spread of strategies and policies across the network.

Engaging in dialogue

In a process closely related to sharing stories and resources, UCORE organizers frequently engage in a dialectical process of dialogue with each other in monthly calls, conference workshops, and other venues. As discussed in the previous section, the monthly UCORE calls include space for both updates and lengthier, thematic discussions featuring stories from one or two related struggles. These conversations vary in structure, with speakers sometimes answering questions and at other times sharing their story without prompts. Either way, the calls always include a period of time for organizers across the country to ask questions, offer encouragement and suggestions, and engage in dialogue in other ways with the featured speakers. As I explored in Chapter 8, this process of problem-focused storytelling and listening, engaging in dialogue, and discussing potential actions closely relates to Freire's praxis of problem-posing education (Freire, 1970; Wallerstein 1983).

In some cases, UCORE conference workshops follow a similarly Freirean structure, with featured presenters speaking to a specific challenge and both prepared questions and questions that emerge over the course of the workshop. In other cases, workshops are structured in a way that allows the topics of discussion to emerge over the course of the workshop. I include two examples of these models below based on examples from sessions at the 2015 conference, recognizing that they are two of many potential structures used by UCORE organizers and that network discussion processes are fluid and ever-developing.

At the 2015 conference, a session on privatization followed a structure similar to network calls, with the following questions posted for discussion:

> 1) What strategies can unions use to unify charter school teachers organizing with the fight against privatization?
> 2) How should unions relate to districts in the face of privatization?
> 3) How best fight privatization? In isolation or as part of a broader fight? What would that look like?

At another session that same day, an organizer from New York's MORE caucus led participants in the session "Caucus and Local Challenges" in a brainstorming process similar to processes used in progressive education:

> The session used some of the key tactics of classroom discussions in schools: brainstorming a list of key discussion points as a group, narrowing them down to a shorter list, and then breaking into groups where participants can discuss the point of their choice. [. . .] From among these suggestions, the group decided on eight challenges to discuss within the groups: Teaching Unionism/ Recruiting young teachers; Building alliances/ fighting false reformers; Leadership, dues, and organizational structure; Racial equity; Focus/ Internal critique; Fair elections; Responding to anti-union; and Politics.

Educators formed groups around the topic most salient to their local context, engaged in dialogue with others in their small group, and then reported back to the large group the key points of their discussion.

Developing norms.

The storytelling and discussion processes described in the previous two sections offer glimpses into the ever-evolving norms UCORE organizers in network spaces, which represent a process of experiential learning that allows organizers to adapt these norms for use in their own contexts. As a CORE organizer noted at a session documenting the history of the CUORE network in 2015, educators in the network are thoughtful about the culture and norms of the network they are creating: "We are very intentional in not replicating the oppressive structures we are under" (field notes, August 9, 2015). Indeed, in my research, I have found that UCORE organizers develop norms for a range of

purposes that are expressly counter-hegemonic, including creating a welcoming culture, building supportive relationships, facilitating learning across contexts and differences, and countering hegemonic systems of power. Organizers in the UCORE network develop, enact, and share counter-hegemonic norms within the network itself, which in turn allow them to be adapted in other spaces.

At the 2017 UCORE conference, I was especially attuned to the discussion and use of norms among caucus educators, perhaps in part because I was now organizing and facilitating meetings within the SEE caucus. At the opening session on the first morning of the conference, a facilitator from CORE introduced a set of norms. Discussion norms included self-regulating norms such as asking “WAIT-Why am I talking? Is it because I have privilege?” as well as group norms such as using a progressive stack. In explaining the network’s use of progressive stack, the facilitator noted, “We take a progressive stack, giving voice to people of color and [based on] gender, and also making sure that people who have spoken already are lower on the stack. The people who speak the loudest and the longest aren’t the people who get the most space” (field notes, August 5, 2017). SEE caucus members had discussed implementing a progressive stack at a recent meeting (field notes, July 26, 2017), so I was interested in seeing and experiencing this process in person. In a session on leadership later that day, a facilitator from the BMORE conference noted that she was going to try leading discussions using a progressive stack: “I’m going to try doing a progressive stack for the first time. I saw it and I liked it” (field notes, August 5, 2017). Likewise, when SEE caucus meetings began again for the 2017-2018 school year, progressive stack was implemented as a norm at all caucus meetings, as well as being explained at the start of each meeting.

As evidenced with the example of the progressive stack, organizers both discuss and enact counter-hegemonic norms in UCORE spaces, in many cases experiencing them so that they are better able to consider applying them in their own contexts. Through this process, organizers create subaltern counterpublics (Fraser, 1990) within both the UCORE network and their own caucuses, prefiguring the changes they would like to see in wider publics through their organizing.

Linking struggles.

In many ways, the UCORE network was born out of the process of linking struggles. As organizers in CORE and Labor Notes connected with educators across the country, they recognized links between the struggles they were each facing and the potential to learn from each other's experiences. As the network continues to grow, this same process has continued, and one of the most striking features of organizers' social media presences –individually, on caucus media, and in the UCORE network group – is how closely organizers follow and express solidarity with each other's struggles. In UCORE network calls, this solidarity is equally striking, with organizers frequently using the chat feature on Zoom to write messages of solidarity, encouragement, agreement, and appreciation for each other's work (field notes, September 24, 2017).

In the wake of the 2019 West Virginia and Los Angeles educators' strikes, for example, representatives from those struggles joined the network call to share stories and insights from their respective organizing. As part of this conversation, which I documented in field notes to share with educators in the SEE caucus who were interested in learning more about the aftermath of the LA and West Virginia strikes, organizers from both struggles noted how much they had learned from each other's work. After the

Los Angeles report, the conversation was opened to discussion, and many participants expressed how much they had learned from organizers in Los Angeles:

> Reps from other caucuses chimed in to say what the LA strike meant to them. A WV organizer noted that it helped them to organize against privatization, in that members were watching LA educators fight charters in the news and it helped them realize they didn't want charters there. He noted that "People were reading about the LA strike, reading about charters, and this bill came up I think literally while LA was in strike. People were realizing, 'wow we are in this same battle, [...] this same fight we are seeing everywhere.'" (field notes, March 24, 2019)

Similarly, after the West Virginia organizers presented, participants spoke up about the ways they had learned from and been inspired by their organizing:

> Caucus organizers across the country talked about what the WV strikes meant to them. Virginia educators noted that it was important because they are neighbors and VA has been looking to WV for inspiration. They asked logistical questions for coordinating a statewide strike, including how the votes were held. An LA organizer noted that the strikes have been very inspiring to LA educators. She pointed out that even though they won, some members didn't realize how significant their victory was until they read about how West Virginia educators saw LA as an example of how to fight against privatization. She said WV has been an inspiration of how to fight with "perseverance and stamina," showing members that "we are against such a huge beast that it might take more than one strike." (field notes, March 24, 2019)

Through this conversation, organizers expressed solidarity and appreciation, drawing connections between each other's struggles and discussing how they had learned from each other. On one level, this documents organizers' own understandings of how they have learned from each other, which can be seen throughout my field work and interview. On another level, these expressions of solidarity and appreciation are part of a process of linking struggles, and this process strengthens relationships between organizers, builds the broader network, and helps participants to feel less alone and more hopeful as they return to struggles in their respective contexts.

This could be seen a month earlier, on the eve of the second major West Virginia strike in recent history, when the UCORE network convened a special call focused on showing solidarity to West Virginia educators, many of whom were unsure of their potential to win another statewide struggle. On this call, organizers from Arizona Educators United (AEU), New Jersey Caucus of Rank-and-File Educators (NJCORE), Oklahoma Teachers United (OUT), and Social Equity Educators (SEE) offered their perspectives on why the fight against privatization is so important. An organizer from New Jersey's statewide caucus noted that "once you open that door, it's so hard to close it." An organizer form New York City's MORE caucus likewise commented that "people just have to understand that this is publicly funded but privately run" with "no oversight." They also expressed their admiration for and solidarity with organizers in West Virginia. A Massachusetts educator noted that after meeting West Virginia organizers at Labor Notes in Chicago, she came back to her small group of organizers with a greater sense of power and possibility, saying "if six people could champion shutting down the state, imagine what the nine of us could do." Representing the SEE caucus, I shared a comment from one of my fellow organizers that "Educators in West Virginia and other red states show that if we stand united for each other and our students, we're powerful!" An organizer in the CORE caucus likewise reflected that "one of the most powerful things" educators could do is "compare notes with each other" to "help you build rank-and-file power." She further encouraged West Virginia educators to "fight for what you know is right and keep fighting for what is right" (field notes, February 18, 2019).

In this way, we can how see how a call designed to offer support in turn facilitated learning and knowledge production. We can also see how, through this call,

organizers intentionally fostered a sense of solidarity among educator unionists leading struggles across the country, particularly educators preparing to engage in another contentious struggle against corporate and legislative power. In this example, alongside many others I experienced over the course of this project, organizers were literally – even if virtually – there for each other in ways that concretely supported both the individual struggles of each caucus and the development of broader movements (field notes, February 18, 2019).

Summary and Discussion

In this chapter, I have argued that the same cultural practices that characterize caucus organizing in turn facilitate the diffusion of social justice unionist practices and policies across the UCORE network. In particular, I have focused on the practices of connecting with other educators, gathering together, sharing stories and resources, engaging in dialogue, developing norms, and linking struggles in UCORE organizing.

My aims in this chapter have been threefold: to document the extraordinary knowledge production and dissemination in the UCORE network, to show how caucus cultural practices facilitate the movement of policies across the United States and the development of a major social movement; and to capture some of the qualities that inspire such deep affection between organizers and commitment to their collective work. In pursuing these aims, I hope to also contribute to a number of debates in the scholarship on policy mobility and social movement organizing. Likewise, I hope to contribute to reflective praxis among UCORE educators by discussing some of the many elements that make their work so significant, as well as capturing some of the cultural practices that characterize their work in the contexts and time period of my study (2015-2019).

In conversation with the field of policy studies, I have documented and analyzed how a counter-hegemonic network organizes against neoliberal policy networks such as those discussed by Ball (2014) and Au and Ferrare (2015). I have suggested some similarities between frameworks for understanding the spread of policies in the policy learning literature (Rose, 1991), such as the pedagogical dimensions of sharing stories in the UCORE network. I have also suggested some connections to the policy mobility (Peck, 2011) and fast policy (Peck & Theodore, 2015) literatures, emphasizing the relational dimensions of policy movement as well as the attention to context as organizers adapt policies. I have also highlighted some of the many significant ways that policy mobility in a counter-hegemonic educator network differs from policy mobility in a neoliberal network. To begin with, the UCORE network is led by educators rather than elites, and organizers in this network are very committed to not reproducing the social hierarchies that dominate wider society as much as they can, including false distinctions between experts and practitioners or leaders and works. Organizers also recognize the ways that they are continuously learning from each other and from their own successes and failures, and they discuss "sharing notes" or "discussing lessons" rather than sharing "best practices." For organizers in this network, the work is fluid and developing, new and experienced organizers learn alongside each other as equals.

In dialogue with the social movement literature, I have documented and analyzed the development of a major social movement led by educators over the course of the past four years. In particular, I have developed findings that align with and contribute to the cultural turn in social movement studies, including paying attention to the emotional (Goodwin et al., 2001) and narrative (Polletta, 2006) dimensions of organizing. I have

also developed findings that align with and contribute to the “movement-relevant” turn in social movement studies (Bevington & Dixon, 2005), using a militant ethnographic method (Juris, 2008) to highlight the cultural practices of caucus organizing and how these practices facilitate the spread of policies. Moreover, I have engaged with the literature on knowledge production in social movements (Foley, 1999; Conway, 2005), illuminating the ways that educators produce, disseminate, and learn from knowledge based on their collective work.

More broadly, this chapter has added to our collective understanding of the significance of social justice caucuses, the UCORE network, and contemporary educator movements. As I have argued, the UCORE network can be seen as a counter-hegemonic network of social movement organizations and “subaltern counterpublics” (Fraser, 1990). I have also highlighted the role of the network in mindfully fostering learning among social justice caucus organizers, fueling contemporary educator movements for democracy and justice.

CHAPTER 10: Conclusion

It's just hugely energizing and helpful to see other people going through the same things you are going through, not that we want everybody to be in pain all the time, but to say, "You know, this is not this little area that's suffering. This is a bigger systemic problem." And so, if it's a bigger systemic problem, we can join together to help fix it. (K. Luebbert, personal communication, March 1, 2019)

"The only reason that I allowed myself to be convinced that we could take over a union and make it be something useful is because of the work of Jackson, and so many people I have met and fallen in love with, and the CORE caucus in Chicago. When they won power, went on strike over educational apartheid, and Karen Lewis stared down one of the most powerful men in the country and called him a bully, I felt like anything was possible. And then we started doing some things here in North Carolina, and some other people around the country got energized. And then the folks in L.A. took over their union, and the rest of us felt stronger. And then Massachusetts, and Hawaii, and so many more." (field notes, February 27, 2016)

When I began this project over five years ago, I was seeking to understand how educators could successfully organize against the inequalities I had seen throughout my work as a public-school teacher: the draconian testing requirements, harmful discipline policies, overcrowded classrooms, standardized curricula, systemic racism and poverty, and undemocratic school management that I had seen push both students and teachers out of the system. While I had participated in mobilizations against high-stakes tests in Texas, as I began my journey as a graduate student I wanted to know more about how educators in such struggles as the Chicago teachers' strike and the Seattle MAP boycott had democratically built broad movements for educational and social justice. This journey led me to the work of social justice caucuses in the newly formed UCORE network. In my studies alongside social justice caucus organizers in this network, I have had the opportunity learn first-hand about a model that has transformed teachers' unions

across the country from the ground up, as well as advancing justice in schools and society as a whole. I have also had the opportunity to be part of a community of educators and unionists who are deeply committed to this work, their students, and each other. To paraphrase comments made by several organizers over the course of this project, it's a community that you couldn't help falling in love with.

As I explored in Chapter 4, the account I offer in this dissertation is only one of many possible interpretations of caucus organizing in the UCORE network. The findings I've outlined here are shaped by my interest in the purpose and practices of educator organizing, as well as my positionalities as a white woman, educator, and militant ethnographer. Moreover, the account that I offer is limited by the scope of my research in a discrete set of contexts and periods of time. As I have shown over the course of this dissertation, social justice caucus organizers are continuously learning from each other and reflecting on their own practices. Through these processes, the very nature of social justice caucus organizing is continuously evolving, and the analyses I offer in this dissertation are designed to interpret caucus organizing in the network from 2015-2019, rather than providing a universal taxonomy or blueprint for this work.

With these limitations in mind, I have explored some of the qualities that make social justice caucus organizing a compelling model for change, as well as exploring the development of a significant counter-hegemonic network and contemporary educator movements. Through my dissertation research alongside caucus organizers, I have also contributed to a range of conversations among both academic and movement intellectuals. In the next part of this conclusion, I will briefly review some of the major arguments that I have made over the course of this dissertation, followed by the ways that

these findings connect to the literatures on education, unionism, social movements, and policy.

Summary of Findings

In part 1 of this dissertation, I introduced social justice caucuses and the UCORE network, briefly tracing the history of educator unionist organizing up until the educator uprisings of the past two years. I further offered a conceptual framework for understanding social justice caucuses and the UCORE network through the lens of the literatures reviewed below. As part of this framework, I argued that educator organizing within the UCORE network could be interpreted as social movements, and that social justice caucuses could be seen as social movement organizations, I further argued that the UCORE network could be understood as a counter-hegemonic policy network of social movement organizations. Lastly, I reviewed the militant ethnographic approach I have taken throughout this project, including the methods that I have used for data collection and analysis.

In part 2 of this dissertation, I discussed the purpose and principles of social justice caucus organizing. In particular, I reviewed how organizers conceptualize social justice caucus organizing in interviews, meetings, public scholarship, and official caucus documents. I also synthesized these conceptualizations to offer a purpose statement for social justice caucus organizing as it is currently discussed by UCORE educators, arguing that most social justice caucuses build their power in order to transform educators' unions from the ground up and advance democracy and justice in schools and society. Moreover, I discussed variations between these conceptualizations, reviewing a few possible explanations for the variations between how social justice caucus organizing is

understood and enacted in UCORE caucuses. Among these explanations, I proposed five fluid, iterative phases of caucus development: emerging, coalescing, broadening, institutionalizing, and fragmenting, arguing that caucuses move between each of these phases in their practices. Lastly, I discussed some of the ethical principles underlying caucus organizers' work, arguing that organizers draw on the principles of care, democracy, justice, and solidarity to frame, guide, and evaluate their work.

In part 3 of this dissertation, I discussed the cultural practices of social justice caucus organizing. Drawing on the five phases I outlined in the previous section, I discussed how organizers engage in ten key cultural practices in their organizing: 1) connecting with other educators; 2) gathering together; 3) sharing stories and resources; 4) engaging in dialogue; 5) identifying issues; 6) developing norms; 7) forging a collective identity; 8) leading campaigns; 9) linking struggles and 10) reflecting on organizing. I further discussed how six of these same principles facilitate the spread of social justice unionist practices across the UCORE network and the United States, fueling the growth of contemporary educator movements.

Significance of Findings

Over the course of this dissertation, I have contributed to discussions in the educational studies literature about whether and how educators can change schools and society (Apple, 2013; Counts, 1932; Freire, 1970; hooks, 1994; Oakes, Rogers, & Lipton, 2006; Stitzlein, 2012). Moreover, I built on the developing body of scholarship offering conceptual research on the relationship between ethical principles and education (Ayers, Quinn, & Stovall, 2009; Beane & Apple, 2007; Boler, 2004; Hytten, 2015; Hytten & Bettez, 2011; Kumashiro, 2009; Noddings, 2002; Strike & Soltis, 2009) as well as

empirical research on the principles underlying educators' teaching and other actions (Santoro, 2011; Valenzuela, 1999). In my discussion of educator organizing in the UCORE network, I have contributed to these literatures by showing how educators have changed schools and society through their organizing in social justice caucuses. I have also drawn attention to the ethical principles underlying this organizing, discussing how educators draw on the principles of care, democracy, justice, and solidarity in their work.

In my studies alongside social justice caucus organizers in the UCORE network, I have also joined discussions in the labor studies literature about social movement unionism (Moody, 1997; Turner & Hurd, 2001; Waterman, 2008; Weiner, 2012), social justice unionism (NCEA, 1994), and social justice caucuses (Johnson, 2017; Maton, 2016a; Maton, 2016b; Maton, 2018; Riley, 2015; Stark & Maton, 2019; Stern & Brown, 2016). In this dissertation, I have offered a definition of the purpose of social justice organizing that reflects current conceptualizations of organizers' work, recognizing that caucus organizing is ever-changing as educators learn from each other's experiences. I have also identified ten cultural processes that characterize caucus organizing, drawing attention to the concrete practices that organizers use to effect change. Moreover, I have also suggested how these cultural processes change over the course of five iterative processes of caucus development: emerging, coalescing, broadening, institutionalizing, and fragmenting.

In my consideration of these cultural processes, I have built on conversations in the social movement literature. In particular, my findings align with scholarship on cultural processes in social movements (Davis, 2002; Polletta,1998a; Polletta 1998b; Polletta, 2006; Polletta & Jasper, 2001), emotional and cognitive processes in social

movements (Eyerman & Jamison, 1991; Diani, 1996; Goodwin et al., 2001), militant ethnographies of social movements (Graeber, 2009; Juris, 2008) and learning and knowledge production in social movements (Conway, 2011; Cox, 2014; Foley, 1999; Hall & Clover, 2005). Through my analysis of social justice caucus organizing within contemporary educator movements, I have identified cultural processes that characterize educator organizing within these movements, many that align with the aforementioned literatures. I have also discussed how these processes vary across five phases of caucus development. Moreover, I have reviewed some of the considerable knowledge production within contemporary educator movements.

Lastly, in my consideration of how policies spread across the UCORE network, I have contributed to the policy studies literature. In particular, my findings relate to the traditional policy studies concept of "policy learning" (Rose, 1991) and the critical policy studies concepts of "policy mobility" (Ball, 2014; McCann & Ward, 2011; Peck, 2011) and "fast policy" (Peck & Theodore, 2015). Building on these literatures, I have discussed the contextually-specific, pedagogical, and relational dimensions of how policies move in the UCORE network. Differing from these traditions, however, I have emphasized the ways that policy mobility in a counter-hegemonic network differs from neoliberal or elite policy networks. In particular, I have discussed how counter-hegemonic cultural practices facilitate the spread of policies across the UCORE network and the development of contemporary educator movements.

While I hope that my dissertation will offer useful insights for each of these literatures, I also hope that it will contribute to both academic and movement scholars' understandings of the significance of social justice caucuses, counter-hegemonic educator

networks like UCORE, and contemporary educator movements. The UCORE network represents a significant development in the history of educators' unions and social movements. Moreover, it represents a unique "counterpublic" (Fraser, 1990) and model that could offer insights for both labor and social movement organizers from areas outside of education. By offering my own interpretation of social justice caucus organizing in the UCORE network from 2015 to 2019, I hope to contribute to broader discussion around the significance of this work and how similar models could be used to advance democracy and justice in other contexts.

In the face of widening economic inequalities, staggering climate threats, and an ever-increasing array of human rights abuses against people of color and immigrants in the United States, educators in social justice caucuses offer a model for organizing against injustice that is more important than ever. As organizers in the UCORE network show, if everyday people work together to collectively challenge multiple forms of oppression, they are capable of taking on the autocrats and billionaires profiting from the destruction of our environment and public institutions. By highlighting the organizing of social justice caucuses in the UCORE network in this and other work, I hope to support the continual spread and growth of contemporary educator movements, contributing to these educators' work to build a different – and better – world.

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Appendix A: Research Questions and Methods

Research Question	Research methods
1. How do UCORE organizers make meaning of the purpose of social justice unionism?	Open-ended interviews with caucus organizers describing their work, participatory observations at caucus meetings, workshops and conventions, social media analysis, document analysis of UCORE archive (see above)
2. What ethical principles characterize organizing in the UCORE network, and how do caucus organizers use ethical principles throughout their work?	Open-ended interviews with caucus organizers describing their work, participatory observations at caucus meetings, workshops and conventions, social media analysis, document analysis of UCORE archive
3. What cultural practices characterize organizing in social justice caucuses?	Open-ended interviews with caucus organizers describing their work, participatory observations at caucus meetings, workshops and conventions, social media analysis, document analysis of UCORE archive

4. How do cultural practices, strategies, and tactics move between UCORE caucuses?	Social network analysis, analyzing references to shared practices and key "brokers" between caucuses within open-ended interviews with caucus organizers, participatory observations at caucus meetings, workshops and conventions, social media analysis, and document analysis of UCORE archive

Appendix B: Caucus Sites and Data Collected

Caucus Name	Acronym	Location	Year Formed	Data
Albuquerque Caucus of Rank-and-File Educators	AbluCORE	Albuquerque, NM	2016	5 interviews, fieldwork on site and in network, documents
Baltimore Movement of Rank-and-File Educators	BMORE	Baltimore, MD	2017	Fieldwork in network, documents
Caucus of Rank-and-File Educators	CORE	Chicago, IL	2008	10 interviews, fieldwork on site and in network, documents
Caucus of Working Educators	WE	Philadelphia, PA	2014	5 interviews, fieldwork on site and in network, documents
Classroom Struggle	CS	Oakland, CA	2011	1 interview, fieldwork in network, documents
Educators for a Democratic Union	EDU	Massachusetts	<2014	1 interview, fieldwork in network, documents
Hawaii Teachers for Change	HTC	Hawaii	2012	Fieldwork in network, documents
Movement of Rank-and-File Educators	MORE	New York, NY	2012	1 interview, fieldwork on site and in network, documents
Newark Education Workers	NEW	Newark, NJ	2012	Fieldwork in network, documents
New Jersey Caucus of Rank-and-File Educators	NJCORE	New Jersey	2016	Fieldwork in network, documents
Organize 2020	O2020	North Carolina	2013	1 interview, fieldwork on site and in network, documents
Progressive Educators for Action Caucus	PEAC	Los Angeles, CA	Early 1990s	2 interviews, documents
Rank-and-File Educators Advocating for Change	REACH	Minneapolis, MN	2014	Fieldwork in network, documents
Renton Caucus of Rank-and-File Educators	RCORE	Renton, WA	2018	2 interviews, fieldwork in network, documents

Social Equity Educators	SEE	Seattle, WA	2009	5 interviews, fieldwork on site and in network, documents
Stronger Together	ST	New York	2014	Fieldwork in network, documents
Union Power	UP	Los Angeles, CA	2014	4 interviews, fieldwork on site and in network, documents
West Virginia United	WVU	West Virginia	2018	2 interviews, fieldwork on site and in network, documents