

## Abstract

*In 2012, when the Chicago Teachers Union (CTU) took to the streets for their first strike in decades, some scholars hailed their practice as an example for unions across the country to follow in order to combat the threat of privatization and defunding. At rallies with thousands of rank-and-file teachers and allies, CTU leadership delivered a message that rejected the city government's neoliberal policies that prioritized free-market principles over public services, framing their demands as a "fight for the soul of public education." This rejection of traditional, business, and elite-oriented trade unionism in favor of a grassroots-oriented, militant coalition of activist and community organizations is known as social movement unionism. This project looks at CTU's practice over the past decade, analyzing the period's three contract negotiations through the lens of social movement unionism.*

*To operationalize social movement unionism for this case study, I propose three criteria for analysis. First, union leadership is accountable to an energized base with new opportunities for engagement and learning. Second, that grassroots-oriented leadership rejects traditional ties with corporate and political elites, instead building political capital by joining forces with activists and community organizations. Third, unions use that capital to demand more than just wages and fair working conditions, instead articulating the connection between the contract fights and a broader political agenda. The culmination of this work adds to existing literature on social movement unionism by providing critical analysis of this case study over a longer period with an updated framework for the twenty-first century.*

**“When We Fight, We Win”:  
Analyzing the Chicago Teachers Union’s  
Practice of Social Movement Unionism from 2010-2020**

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## Acknowledgements

One day while doing preliminary research for this work in the basement of a French café during my study abroad in April of 2020, I came across a labor agreement between the Chicago Teachers Union (CTU) and Chicago Public Schools (CPS). By the time I emerged from that café, I knew my thesis would involve an analysis of CTU contracts. I did not, however, envision doing this research and writing away from Mount Holyoke's campus amid a global pandemic. This brought new challenges to the undertaking of writing an undergraduate thesis, and I certainly could not have done this research or created this work without a supportive network of professors, friends, family, and peers.

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I dedicate this thesis to the late Karen Lewis '74, the heart of CTU throughout this past decade and a committed educator, activist, and leader. I strive to follow her example.

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## Chapter 1: Introduction

*“Frankly, if you want to know what’s wrong with the public education system, it’s been a series of corporate, top-down reforms that don’t take the opinions of the actual educators into account.”*

- Jesse Sharkey<sup>1</sup>

### Introduction

As an estimated 18,000 supporters gathered in the streets of Chicago on Labor Day in 2012, the president of the Chicago Teachers Union (CTU) declared, “Enough is enough!” The crowd burst into cheers, chanting President Karen Lewis’s words.<sup>2</sup> She continued, crying out, “Building by building, school by school, we all came together to stop the juggernaut that doesn’t care about our children, doesn’t know what we do, and has written off twenty five percent of our children. *Our* children.”<sup>3</sup> The “juggernaut” in this speech referred to the forces of neoliberalism that prioritized profit over public investments and aimed to cut education funding and the power of organized labor, especially teachers unions. For Lewis and the thousands of CTU members in the streets that day, the fight had only begun.

In 2010, the rank-and-file members of CTU rejected the years of stagnant leadership under the United Progressive Caucus (UPC), electing instead Lewis and a slate of new leadership from the Caucus of Rank-and-File Educators (CORE). This election would transform CTU into a responsive and active union committed to social justice. CORE leadership triggered a rejection of long-standing ties with business elites and party officials and a radical shift in the policies at the negotiating table. Two years later, in 2012, the union voted overwhelmingly to go on strike for the first time in decades. That strike was followed by a heated, years-long contract

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<sup>1</sup> Micah Uetricht, *Strike for America: Chicago Teachers Against Austerity*, (New York: Verso, 2014).

<sup>2</sup> Chicago Teachers Union, “Chicago Teachers Union President Karen Lewis speaks to 18,000 supporters on Labor Day,” September 3, 2012, YouTube Video, 9:54, <https://www.youtube.com/watch?v=QWIsvi7LOAk>.

<sup>3</sup> Ibid.

negotiation from 2014 to 2016 and another strike in 2019, representing a kind of militancy the city had not seen in decades.

At the same time, left-leaning academics across the country warned about two related dangers: the dire consequences of market-centered, neoliberal policies in the urban sphere and the death of the American labor movement, with dismal union membership rates and high legal barriers to negotiating fair contracts. While these warnings left little room for hope, the Chicago Teachers Union began practicing a new kind of unionism, one that utilized rank-and-file members and community organizing to build broader coalitions for justice, often in militant ways.

This bottom-up unionism, called “social movement unionism,” has been hailed by some scholars on the left as the most successful way to fight urban neoliberalism and reverse the decline of American union power. Social movement unionism is a practice that actively mobilizes union members and a broader coalition of activists and community organizations to achieve demands that are broader than wages and working conditions. For the Chicago Teachers Union, these practices brought tens of thousands of teachers and community members into the streets to fight -- and sometimes win -- against powers determined to reduce the scope of the public sphere and profit off educators, students, and families.

This work examines the theory of social movement unionism over time using the CTU as a case study. It challenges the narrowed focus among labor theorists on the mobilization and rise of social movement unionism. It addresses the challenges and opportunities of maintaining social movement unionism over time and seeks to test the theory in real-world circumstances with a case study covering three contract negotiations. Along with defining what “success” means for social movement unionism, this work argues that under the right conditions, social movement



unionism can achieve broader demands within labor contracts over multiple negotiating periods, as seen through this case study of the Chicago Teachers Union. This chapter first discusses the significance of this case study as it relates to the broader study of unionism and Chicago. It then discusses the research question and methodology for research. The following section expands upon the definition of social movement unionism and neoliberalism by giving an overview of the current literature on these theories. The chapter concludes with an outline of the subsequent chapters and a preview of the conclusions drawn from this case study.

### **Significance**

Neoliberalism is defined as the privatization of public services and the prioritization of market-oriented solutions. Because of this work's focus on teachers' unions, this thesis narrows the definition to focus particularly on education. Schools, as a public-facing institution present in all corners of the country, are a prime battleground for these issues. The defunding of public-school budgets, proliferation of charter schools, and insistence on short-term, economically advantageous policies all contribute to this belief.<sup>4</sup> Neoliberalism brings capitalism more explicitly into the classroom, whether it's through mandated curriculum or less funding for educators. Many teachers, facing scarce resources and seeing their students face systemic issues at home, have articulated the connection between neoliberalism and the classroom in their union organizing, opening the conversation for broader demands.

To say social movement unionism is the sole solution to the ever-present threat of neoliberalism is certainly a comforting statement to those seeking to protect the urban public sphere, however this rhetoric actually does a disservice to the movements and communities most

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<sup>4</sup> Larry Bennett, Euan Hague and Roberta Garner, *Neoliberal Chicago* (Champaign, IL: University of Illinois, 2017).

negatively affected by these policies. This research aims to add nuance to that simplified rhetoric by examining CTU over the course of three contract negotiations between 2012 and 2019. This case study highlights some of the challenges of social movement unionism and some of the barriers to the long-term resistance of neoliberal policies.

Stakeholders and scholars alike can benefit from an expansion on this case study and a more critical look into the various claims made by previous literature. Claiming that CTU's famous 2012 strike should serve as an example for unions across the United States and even the world negates the fact that the longevity and success of CTU's social movement unionism have not been properly analyzed since that strike. Analyses of individual cases of social movement unionism have left important questions unanswered. How can social movement unionism fight back against the reduction of public spaces and resources when there isn't a contract negotiation at play? For example, less than a year after the 2012 CTU strike, Mayor Rahm Emanuel announced that Chicago Public Schools (CPS) would be closing nearly 50 locations, adding on to the dozens of schools already closed before the strike.<sup>5</sup> CTU could do little to stop this initiative. How does social movement unionism change when the political environment changes as well? In 2019, teachers took to the streets once again under a new mayor, Lori Lightfoot, and under new union leadership. Are the relationships built with community organizations and among rank-and-file members sustainable enough to remain engaged eight years later? These questions and others will add essential context and nuance to the established arguments about the effectiveness of social movement unionism.

The interaction between Chicago Public Schools and the Chicago Teachers Union cannot be removed from Chicago's politics, particularly because Chicago is one of the only major cities

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<sup>5</sup> Belsha, Kalyn, "Behind sale of closed schools, a legacy of segregation," *Chicago Reporter*, January 13, 2017, <https://www.chicagoreporter.com/behind-sale-of-closed-schools-a-legacy-of-segregation/>.

with a mayor-appointed Board of Education. Therefore, every contract negotiation and policy decision made by CPS is deeply tied to the mayor that Chicago voters elect. Community organizations in Chicago continue to engage with the city government and advocate for the expansion of the public space even during the Coronavirus pandemic. CTU also continues to broaden its activism during the time of this writing, utilizing the contract between CPS and the Chicago Police Department as a catalyst for a broader conversation about the role of police in Chicago and the Movement for Black Lives.<sup>6</sup> During this time of fast-paced changes to societal structures, the struggle against neoliberal practices is clearly far from over. Therefore, it will be important to remember that this project can only cover the changes in unionism from 2010 to the present day, in 2021, meaning the roadblocks and opportunities for social movement unionism after multiple decades may still be unknown.

### **Research Question & Methodology**

To what extent can social movement unionism resist the politics of urban neoliberalism? This work answers that central theoretical question with a specific case study of the Chicago Teachers Union (CTU) strikes of 2012 and 2019 and the contract negotiations of 2015-2016. While activists and scholars alike often praise the CTU for its utilization of social movement unionism to successfully defeat neoliberal forces in 2012, it remains to be seen how much the union truly won during that strike and whether or not that momentum remained through the following contract negotiations. Micah Uetricht summarizes the sentiment of leftist support for the CTU's social movement unionism, saying, "if other sections of the labor movement were to take some cues from

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<sup>6</sup> Parrella-Aureli, Ariel, "Chicago Teachers Union Members March to Demand Chicago Public Schools Defund Police, Fund Restorative Practices in Schools," *WBBM Newsradio*, June 6, 2020, <https://www.audacy.com/wbbm780/articles/chicago-teachers-union-marches-to-demand-cps-defund-cpd>.

the CTU about militant, bottom-up, democratic left-unionism, unions' extinction might become less of a certainty."<sup>7</sup> This claim, while comforting in theory to those seeking to resist market-based policies, deserves a more critical analysis.

This work utilizes interviews with rank-and-file teachers as its primary source, while incorporating a few interviews with leadership members. This research also questions the extent to which the union was successful in its efforts by comparing the final contracts with their demands and the rhetoric surrounding the strike. The findings from the interviews and contract analysis are supplemented with secondary research into the structure and strategy of CTU leadership and the contract negotiations between the mayor-appointed Board of Education and CTU during each of the strikes. Social movement unionism has frequently been hailed as a success when looking at a singular case study, but there remain questions of possibility about long-term grassroots union practices. Therefore, this project also examines the extent to which CTU's social movement unionism has remained effective at multiple points since 2012 and explores how sustainable this model of organizing can be throughout the seven years between strikes.

## **Literature Review**

Social movement unionism, the central theory used in this project, is certainly not the only proposed form of unionism, though it is regarded as a newer, more hopeful alternative to the bureaucratic unions of the mid-to-late twentieth century. This practice rejects business-oriented and institution-oriented unionism, which prioritizes stability and positive relationships with power holders. Waterman, in publishing the first articulation of social movement unionism, found that with the rise of feminism and other "new" social movements, it was necessary for workers to build

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<sup>7</sup> Michah Uetricht, *Strike for America: Chicago Teachers Against Austerity*. (New York: Jacobin/Verso, 2014), 15.

relationships with broader coalitions, offering a “continuously renewable emancipatory strategy surpassing current liberal, populist and socialist ones.”<sup>8</sup> This rejection of previous types of unionism in the context of a new globalized society is marked by the expansion and domination of “capitalist, military, state, imperial, technical and patriarchal forms and powers.”<sup>9</sup>

Waterman defines social movement unionism as having ten criteria.<sup>10</sup> Because of the domestic and local nature of a teacher’s union, this work rejects the criterion that requires international solidarity and emphasizes that not every union practicing social movement unionism will meet all these criteria. This can be relevant for certain sectors, but should not be hailed as a necessary and central element of the practice of social movement unionism. Many kinds of unions, especially public unions for teachers, postal workers, and government administrators, may not include a global approach to social movement unionism. Unions that are not directly involved in international trade and international financial institutions may benefit from a more place-specific focus, and their practice of social movement unionism can be just as important. Therefore, instead of using the criteria as a test, this work analyzes the most three central ideas of social movement unionism: including struggling for increased worker/union control, working with other allies and movements, and working to transform social issues within society at large.

Before social movement unionism and the threat of union extinction really began, some scholars on the left argue that a “militant minority” of ideologically motivated individuals within unions during the early and mid-twentieth century kept unions active, powerful and large.<sup>11</sup> These

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<sup>8</sup> Peter Waterman, “Social-Movement Unionism: A New Model for a New World,” *ISS Working Papers Series* 110, (1991).

<sup>9</sup> *Ibid.*, 1.

<sup>10</sup> It should be noted that Waterman did not develop this theory alone and gives credit to mostly unpublished and informal discussions with scholars including Lambert, Webster, and Munck as early as 1987. These scholars will continue a debate about social movement unionism in published works for years after this publication.

<sup>11</sup> Micah Uetricht and Barry Eidlin, “US Union Revitalization and the Missing ‘Militant Minority,’” *Labor Studies Journal* 44, no. 1 (March 2019):36-59, <https://doi.org/10.1177/0160449X19828470>.

individuals “linked workplace and community struggles” and “connected rank and filers to leadership,” meaning they did much of the work that today’s social movement unionism relies on.<sup>12</sup> Uetricht links the decline of this militant minority, and therefore the decline of strong unionism directly to the Red scare of the 1940s and 1950s which resulted in even liberal union leaders ousting their most far-left activists who were often the ones driving much of the union’s militancy and power.<sup>13</sup> Social movement unionism, therefore, is a revitalization of past practices. This historical context is important not only to understand the role of militant members, but also to anticipate a backlash to the practice of social movement unionism.

Labor scholars have many different methods for organizing the types of unionism, but the union dimensions matrix, developed by Munck and seen in Figure 1, most effectively points to four types of unionism based on their focus on mobilization, society, institutionalization, and market.<sup>14</sup> Other versions of this matrix include the level of engagement (whether global, local, national, or regional). Both Figure 1 and Figure 2 are examples of how Munck and others have situated social movement unionism within other forms of unionism over time.

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<sup>12</sup> Ibid, 36.

<sup>13</sup> Ibid, 51.

<sup>14</sup> Ronaldo Munck, “Globalisation, labour and the ‘Polanyi Problem,’” *Labor History* 34, (2004): 251-269.

Figure 1.<sup>15</sup>

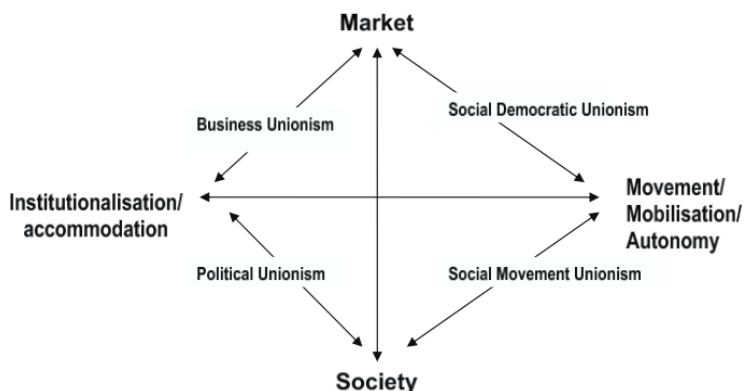
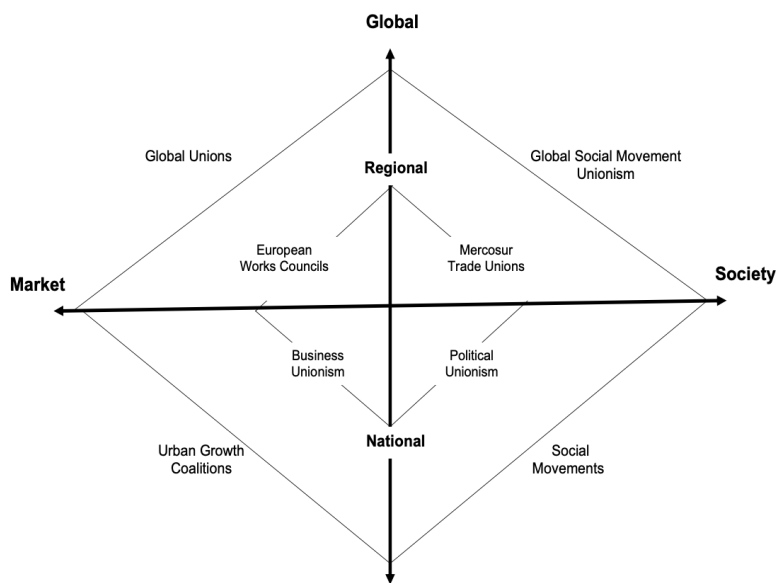


Figure 2.<sup>16</sup>



This figure allows social movement unionism to be situated among other strategies. Unions prioritizing markets and institutions follow business unionism, resulting in contracts in line with

<sup>15</sup> Peter Fairbrother and Edward Webster. "Social Movement Unionism: Questions and Possibilities." *Employee Responsibilities and Rights Journal* 20 (2008): 312, <https://doi.org/10.1007/s10672-008-9091-1>.

<sup>16</sup> Ronaldo Munck, "Globalisation and Trade Unions: Towards a Multi-level Strategy?" *Work Organisation, Labour & Globalisation* 2, no. 1 (2008): 17, <https://doi-org.proxy.mtholyoke.edu:2443/10.13169/workorglaboglob.2.1.0011>.

neoliberal urban policy. Those unions prioritizing institutions and society practice political unionism, while those prioritizing markets and movements practice social democratic unionism. Most importantly for this project, Munck defines social movement unionism as the intersection of society and mobilization. In other words, it is a rejection of the market and institutional forces of business unionism that favor neoliberal policies. No union is purely on one end of this matrix. Pressures from institutions and businesses will always exist for unions. This makes research into real-world cases of social movement unionism even more important because each union at each point in time will have to bend to certain pressures. Better understanding of the causes behind their successes or failures will create a more comprehensive picture of social movement unionism in practice. Despite the existence of outside pressures, CTU's current strategy as an organization prioritizing societal concerns and mobilization of their base establishes them as a social movement union. Other scholars have proposed other matrices that describe the different forms of unionism; however, most rely on the opposition of business unionism and social movement unionism with the ever-present tension between the private and public spheres.<sup>17</sup>

Additionally, since the foundation of social movement unionism literature, anti-union sentiments and laws have become much more prevalent. Public sector unions are targeted by Republicans and, increasingly, Democrats in government. This development poses an important challenge for unions seeking to achieve political results, since scholars have shown the most success for movements that join forces with a political party.<sup>18</sup> Social movement unionism, however, rejects long-standing ties with party organizations and therefore presents an interesting dilemma for leaders. Because movements cannot last forever, eventually union leadership is likely

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<sup>17</sup> Richard Hyman, "Union Renewal: A View from Europe," *Labor History* 45, (2003): 333-382.

<sup>18</sup> Edwin Amenta et al, "The Political Consequences of Social Movements," *Annual Review of Sociology* 36 (2010): 287-307.



to develop closer ties with political actors, especially if they are able to shift the political context and elect officials who align more closely with their values. Unions who can do this may shift towards a practice of political unionism, which prioritizes institutionalization instead of mobilization while remaining focused on societal instead of market forces. It will be necessary for unions practicing social movement unionism to actually change the party structure and platform to be more explicitly and truly pro-union if they ever want to achieve the success outlined by academics. Whether or not this is possible, however, is unclear.

While unions themselves are not automatically considered social movements by many scholars, labor movements are one of the most heavily studied elements of social movement literature.<sup>19</sup> Amenta defines social movements as “actors and organizations seeking to alter power deficits and to effect social transformations through the state by mobilizing regular citizens for sustained political action.”<sup>20</sup> Unions practicing social movement unionism would fit into this definition if they are mobilizing those “regular citizens” to expand their coalition of support. Social movement unionism will have a slightly different intermediate goal; instead of focusing political activism on passing laws, social movement unionism seeks to achieve success primarily through contract negotiations. Of course, many of the broader issues addressed by these unions will also involve political organizing for laws and candidates. Amenta writes, “Movements and organizations that are not primarily state oriented may also target the state for policies that aid them in struggles against other targets.”<sup>21</sup> In this way, unions practicing social movement unionism may engage politically with the state in order to change labor laws and achieve beneficial policies and funding to make their contract demands more achievable.

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<sup>19</sup> Amenta et al., “The Political Consequences of Social Movements,” 294.

<sup>20</sup> Ibid.

<sup>21</sup> Ibid, 191.

Movement literature looks at three “main determinants of mobilization.” These are resource mobilization/structures, framing strategies, and political opportunities/contexts.<sup>22</sup> The mobilizing structures for those practicing social movement unionism would be the unions themselves. The formal nature of this mobilizing structure grants unions more longevity, institutional resources, and clear membership. This can be a benefit for unions attempting to mobilize a movement, though the inflexibility of a formal structure and the fact that membership is occupation-specific instead of ideological can present barriers. The framing strategies of a social movement are the “strategic efforts by groups to create a shared understanding that motivates collective action.”<sup>23</sup> While unions differ vastly in their framing strategies, they generally can benefit from having a clear leadership structure able to unify framing strategies. On the other hand, it can be difficult to frame union-specific issues as broad enough to create an entire social movement, especially for niche sectors without many public-facing employees. Finally, the political opportunities, including the “constraints and opportunities unique to the national context in which they are embedded” deeply change the social movement, including in the practice of social movement unionism.<sup>24</sup> Unions seeking to organize more broadly, like all social movements, rely heavily on the political context of the moment. Having an unresponsive and unpopular political figure or dealing with a crisis, for example, can motivate individuals and groups in a way that politically stable time cannot.

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<sup>22</sup> Ibid.

<sup>23</sup> Doug McAdam, John D. McCarthy, and Mayer N. Zald, “Introduction: Opportunities, mobilizing structures, and framing processes -- toward a synthetic, comparative perspective on social movements,” in *Comparative Perspectives on Social Movements: Political opportunities, mobilizing structures, and cultural framings*, (Cambridge, UK: Cambridge University Press, 1996), 1-20.

<sup>24</sup> Ibid, 6.

Fairbrother argues that unions “are social movements that arose out of a questioning of the ‘principles of the prevailing social and economic order.’”<sup>25</sup> Drawing on Hyman, Fairbrother notes that unions, having grown from social movements, find themselves pulled between being a “business-like service organization” and being an “expression and vehicle of the historical movement of the submerged laboring masses.”<sup>26</sup> Therefore, social movement unionism is going to contain both “progressive and accommodating dimensions.”<sup>27</sup> When social movement unionism inevitably demobilizes, it shifts towards the accommodating dimensions, focusing more on services like individual grievances. This may happen because of burnout among the rank-and-file, relative success politically, or shifting public opinion. Regardless, it does not mean that the union can never engage in social movement unionism again. As political contexts change and new issues arise, it is possible for new forms of this practice to emerge.

In addition to the theory of social movement unionism, this work analyzes the capacity of unions to combat neoliberalism. Neoliberalism is “the political economic theory that in public administrative practice and legislation marketizes public services and privatizes public sector functions.”<sup>28</sup> Essentially, neoliberalism focuses on the reduction of the public sphere both physically and fiscally. Chicago is a neoliberal city, with the very origins of neoliberalism stemming from the “Chicago School” of thought and Milton Friedman’s work at the University of Chicago. This focus on markets as the solution to problems has fit quite well into the mayoral regimes throughout the city’s history. Richard M. Daley, the city’s longest serving mayor (1989-2011), certainly accelerated this process, but Rahm Emanuel’s rise to power in 2011 solidified

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<sup>25</sup> Fairbrother, “Social Movement Unionism: Questions,” 309.

<sup>26</sup> Ibid.

<sup>27</sup> Ibid, 310.

<sup>28</sup> Bennett, *Neoliberal Chicago*. See also: David Harvey, *A Brief History of Neoliberalism*, (New York: Oxford University Press, 2005) and Naomi Klein, *The Shock Doctrine: The Rise of Disaster Capitalism*, (New York: Picador, 2007).

Chicago as a “City for Sale.”<sup>29</sup> Neoliberalism is also pervasive, affecting everything from policy to identities. This is particularly true in the education sector, where a rise in charter schools and frequent public school closings serves as a clear example of the physical reduction of the public sphere in line with neoliberal ideology and practice.<sup>30</sup> Because of the ideology of those practicing and promoting social movement unionism, this work treats neoliberalism as a negative policy agenda for social justice and those concerned with the expansion or safety of the public sphere, particularly public school teachers and the community organizations active in Chicago. There are certainly academics who argue that neoliberal practices can result in positive results for communities, however the very basis of social movement unionism ideology relies on treating neoliberalism as a harmful danger to vulnerable communities who rely on the public sector.

At the intersection of these two literatures lies some very hopeful analyses of social movement unionism as the perfect solution to combat neoliberal takeovers of urban space, including multiple books showing the 2012 CTU strike as the prime example for this solution.<sup>31</sup> While it is true that the 2012 CTU strike marked a shift in the internal organization and external strategies of CTU and allowed the union to reject certain educational proposals in line with neoliberalism, the analysis often stops there. Writers instead refocus their analysis on the wave of strikes in the United States that followed the 2012 CTU strike that used similar tactics. These authors’ central claims deserve to be critically examined, but it is also necessary to expand beyond the 2012 strike, looking at how effectively social movement unionism can bargain without a strike,

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<sup>29</sup> Bennett, *Neoliberal Chicago*, 2.

<sup>30</sup> Pauline Lipman, *The New Political Economy of Urban Education: Neoliberalism, Race, and the Right to the City* (New York: Routledge, 2001).

<sup>31</sup> See Micha Uetricht, *Strike for America*; Steven Ashby and Robert Bruno, *A Fight for the Soul of Public Education: The Story of the Chicago Teachers Strike*, (Cornell, NY: Cornell University Press, 2016); Elizabeth Todd-Breland, *A Political Education: Black Politics and Educational Reform in Chicago since the 1960s (Justice, Power, and Politics)*, (Raleigh: The University of North Carolina Press, 2018).

as happened in 2015/2016, and how effectively CTU remained a threat to urban neoliberalism in Chicago during the 2019 strike under a different mayor and with a different union president.

### **Analytical Framework**

At each chronological point of inquiry, the Chicago Teachers Union's practice of social movement unionism offers different insights into the theory in action. Understanding that no union can perfectly practice such a hypothetical theory of unionism, analyzing the shortfalls and roadblocks for CTU offers a clearer picture of the sustainability of the practice. In order to operationalize the concept of social movement unionism, this research proposes analyzing the union using three categories: leadership, relationships, and policy. This analytical framework stipulates that social movement unionism cannot successfully combat neoliberal practices until it first organizes grassroots leadership with an engaged rank-and-file membership, then builds coalitions with community organizations instead of business and political powerholders, and finally commits to fighting for issues broader than wages and immediate working conditions. This sequence of categories generally builds on itself, both in the short-term strategic focus and the long-term successes in each category.

The first step in practicing social movement unionism is to ensure that the union leadership is embraced by rank-and-file members and remains accountable and transparent to them. Union leadership should also work to empower rank-and-file members to become active leaders themselves and consult membership at each point in a decision-making process. This kind of bottom-up, grassroots leadership results in engagement that keeps the union accountable to its members and the community. Teachers who hear stories from their students and families about poverty, inaccessible housing, or racial injustice can have a voice and a role in fighting for

those students and families only when they have a union leadership ready to listen and prioritize the wishes of all teachers.

The most politically successful social movements eventually connect themselves closely with a main political party.<sup>32</sup> Social movement unionism, however, rejects long-standing ties with party organizations and therefore presents an interesting dilemma for leaders. Because movements cannot last forever, eventually union leadership is likely to develop closer ties with political actors, especially if they are able to shift the political context and elect officials who align more closely with their values. Unions who can do this may shift towards a practice of political unionism, which prioritizes institutionalization instead of mobilization while remaining focused on societal instead of market forces. The engagement and accountability of leadership is bound to change overtime, especially as business and political pressures mount. This presents an opportunity for further analysis in the study of social movement unionism in action.

At each point of chronological analysis, this work looks at the extent to which rank-and-file teachers are engaged in the union, the accountability and transparency of union leadership to its members, and the evolution of union action based on membership interest. While the CTU contracts do not contain as much information on this element of social movement unionism, other sources such as public statements, interviews with rank-and-file teachers, and posts from the CTU website's blog are all essential to understand the nature of union leadership and how it drives resistance to neoliberalism.

After analyzing union leadership and its success as an element of social movement unionism to combat neoliberalism, this work explores the changing relationships between CTU officials and both community members and government officials. Whereas business or market-

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<sup>32</sup> Amenta, "The Political Consequences of Social Movements," 192.

oriented unionism may prioritize partnerships with the government and businesses in order to stay on their “good side” and find favor during contract negotiations, social movement unionism relies on the idea that relationships with activists and community organizations are more important than political or business ties. This assumes that if a union has enough support from parents, activist organizations, and other community members, it can then rally this base in pushing for contract wins. This can certainly be risky, and at each point in CTU’s recent history this results in varying degrees of success. Building this kind of political capital takes time, too, and therefore this element of social movement unionism is key to understanding the timeline for policy-based wins.

The third and most important element of social movement unionism is its prioritization of issues beyond wages and immediate working conditions. This is the most tangible element of using social movement unionism to fight neoliberalism. Once a union’s base is activated and it has long-term relationships with the community, it can fight for justice in new ways. Instead of only advocating for raises, job security, and school infrastructure, CTU advocates for broader issues like racial justice, housing access, and tax reforms that reject business interests. This fight happens despite anti-union laws in Illinois limiting what issues are legally permissible in contract negotiations, showing the union’s resolve to work on these broader battles. This section relies more heavily on the CTU contract, analyzing what elements address the broader causes and effects of neoliberalism. This section also relies heavily on the statements from CTU during these negotiations. Comparing what they claim to fight for with what they actually can negotiate will be key in understanding how successful social movement unionism can be in combating neoliberalism. Does social movement unionism only build relationships and change union

structure by bringing broader issues to the forefront? Or can these practices actually change the policies surrounding those broader issues?

This work also benefits from a theoretical hypothesis of what successful social movement unionism can achieve. Successful social movement unionism achieves many (if not most) of its contract demands over a period of time. Union leaders can mobilize and educate its members, change its relationship with political leaders while building a broad coalition of support, and articulate a framework of demands that go beyond wages and working conditions and fit into the current political climate. The period of time can vary across unions, but social movement unionism can be successful without being permanent. Real, tangible “success” in the form of an excellent contract for rank-and-file members may be the peak of social movement unionism for an organization. At that point, investment in the movement may taper off, though electing politicians and power holders who share the unions values can also be an important motivator. As the social movement created by social movement unionism fades, determining the union’s views on those in power and its contract will be essential for determining whether or not it was a “success.” If there is still discontent towards politicians and if the most recent contract does not include many of the union’s most important demands, a decline in mobilization may be the result of burnout and hopelessness. If the decline in activism follows a positive election cycle for the union and a contract that includes many of their most important demands, it may be the sign that the union’s successes stemming from its practice of social movement unionism actually led to its eventual decline. “Movements may largely be born of environmental opportunities, but their fate is heavily shaped by their own actions.”<sup>33</sup>

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<sup>33</sup> McAdam, “Introduction: Opportunities, mobilizing structures,” 15.



This work argues that CTU's practice of social movement unionism over time achieved policy success within its contract by building political capital through leadership mobilization and relationship building. It finds that in 2012, CORE's leadership was able to energize the rank-and-file around a common message that could be best articulated and understood through striking. As the practice of social movement unionism begins, success looks like an engaged and militant rank-and-file articulating a message beyond wages and working conditions, which CTU did quite well. As time went on, in 2015-2016, CTU solidified its relationships with other unions and community organizations, strengthening its coalition of support and expanding its political capital. The unionization of multiple charter networks and eventual incorporation of these unions into CTU itself represent a massive success for CTU because it increased the real cost of operating a charter school and thus slowed expansion. The contract during this period is not necessarily a "success" for social movement unionism or CTU, largely because of the city's fiscal crisis at the time, but the union was able to fend off many of the deepest cuts to public schools and achieve some other wins, including a moratorium on charter school expansions. In 2019, however, CTU achieves massive policy success by harnessing its coalition of support for another strike, showing that social movement unionism requires organizing over time to achieve success, especially when the political or financial environment creates challenges for the union. While CTU's practice of social movement unionism over the past decade has created three contracts that expand the public sphere and stave off many neoliberal policies, these tangible results were only possible because of the union's leadership and relational organizing strategies as well as the political, financial, and logistical contexts of the time and place studied. This case study provides ample insight into social movement unionism's challenges and opportunities and shows that unions can achieve substantial contract wins aimed at combating neoliberalism in

education, however these changes may not be possible for every union depending on its surrounding political and economic context.

### **Chapter Outlines**

This work looks at the three contract negotiations since CORE, the caucus that transformed CTU into a social movement union, was elected to lead CTU in 2010. Each chapter begins by contextualizing the events over the course of the negotiating period. Each chapter then analyzes a different period through three lenses. First, the chapters assess the leadership within the union and how that translated to internal union militancy and engagement. Second, each chapter looks at how CTU's relationships with the political establishment and community organizations shifted over time with its focus on grassroots coalition building. Finally, the chapters analyze the policy demands and results for each contract, looking at whether or not broader demands influenced the final agreement between CTU and CPS.

Chapter 2 provides an overview of CORE's election to leadership and the subsequent strike during their first contract negotiations. This is the most previously covered strike of the three periods, given its historic nature. Chapter 3 analyzes the 2015-2016 negotiations. While there was not an official strike during this period, the April 1 Day of Action was classified as an illegal strike and the teachers worked for a year without a contract during these negotiations, making the period a departure from the typically calm contract negotiations of pre-CORE leadership. Chapter 4 looks at the most recent strike during the 2019 contract negotiations. Much of the literature about this strike does not yet exist given it happened most recently, meaning this analysis will be very important for the understanding of CTU's role today. Chapter 5 provides conclusions about CTU's practice of social movement unionism and some generalizations from

this work. The chapter also addresses the more recent actions taken by CTU around returning to in-person classes during the COVID-19 pandemic.

## **Conclusions**

While one case study cannot fully portray all the possible challenges and opportunities for the social movement unionism, there are ways in which this analysis can shed light on important aspects of the practice. Changes in leadership (both for the union and for the city/district) can drastically affect the strategies and relationships on both sides of the negotiating table, and therefore it is important to watch how social movement unionism evolves beyond a single charismatic leader. Additionally, the capacity to build city-wide coalitions will vary between cities, making social movement unionism's rejection of political elites a riskier move for places without an organizing history as strong as Chicago's. Not only does geography create better outcomes for certain unions, but teachers' unions may be particularly predisposed to successful organizing in this way since they are a public-facing sector society heavily relies on. In many ways, CTU's successes are the result of strong leadership taking advantage of opportunities not all unions have. This is not to say that social movement unionism cannot be successful for many unions, but it is important not to overgeneralize the experiences of CTU. Still, the union's successes and failures over the past decade provide helpful insight into the strategy and can further the literature on unionism as a whole.

Social movement unionism is not just a movement. While it shares many characteristics with a movement and will not be a permanent practice, it has some distinctions that make it more of a historical moment within a union and community. The moment can last over a decade, but eventually the practice will end. There are already signs of this happening during the coronavirus

pandemic, where disagreements over school reopenings and the barriers to online organizing have created some discontentment or disengagement within the union. For this reason, the coming years will provide ample opportunities for understanding the cyclical nature of social movement unionism. At some point, CTU's practice of social movement unionism will fade. This does not mean that social movement unionism is hopeless or should not be practiced, but instead provides the opportunity for a formalized structure to still lead social movements without disrupting its overall form and function in society. This makes social movement unionism one of the more sustainable forms of movement, since the union will continue to exist even after it has become less militant and mobilized. When the political environment is right again, it can reemerge, ready to address the next challenge.

## Chapter 2: The 2012 Strike

*It was very challenging, but it was also very inspiring to be literally on the streets with my coworkers and fighting for things that we need -- not “we” as our school, but “we” as the greater public.*

- Laura Ferdinandt, CTU rank-and-file teacher

### Introduction

The first part of this case study on social movement unionism examines the Chicago Teacher Union’s (CTU) 2012 strike. As the union’s first strike in decades during a period of nationwide union decline, left-leaning academics and news sources hailed “the strike that brought teachers unions back from the dead.”<sup>1</sup> In order to add nuance to this over-simplified analysis of the strike, this chapter argues that the 2012 strike laid the foundation for later success by building the internal organizing and leadership element of social movement unionism. While the resulting contract did include some of the union’s demands and the union’s militant coalition-building did bring some political capital, this chapter shows that social movement unionism will not generally achieve its goals in one strike.

This chapter begins by contextualizing the union within the historical and political environment of Chicago leading up to the 2012 strike. CTU is situated in a city under political leadership dedicated to a continuation and expansion of neoliberalism. In 2012, the city of Chicago and the state of Illinois found itself in a financial crisis, with yearly school budgets swamped by growing deficits. After establishing this background, this chapter explores three aspects of the strike and the leadup to the strike using the tripartite framework of social movement unionism proposed in the Introduction: leadership, relationships, and policy. In

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<sup>1</sup> Dylan Scott, “The strike that brought teachers unions back from the dead,” *Vox*, last modified July 5, 2019, <https://www.vox.com/the-highlight/2019/6/28/18662706/chicago-teachers-unions-strike-labor-movement> (accessed April 23, 2021).

analyzing leadership, the chapter looks at both the form of union leadership as well as the reception and actions of the rank-and-file members. A union with accountable leaders and an activated base is better able to practice social movement unionism. The relationships section analyzes both the union's relationship to those in power -- including the mayor and his appointees as an extension of the national Democratic Party -- and the union's relationship with grassroots organizations in the community at large. For a teachers union like CTU, social movement unionism in action is a rejection of mainstream, neoliberal political leaders, and a long-term investment in the relationships with parents, community organizations, and other activists. Finally, the policy section will analyze the success of both the contractual demands -- meaning the specific elements that can be negotiated at the bargaining table -- and the broader demands, including calls for national policies or radical change. CTU will successfully practice social movement unionism if it shows progress in activating its internal membership, rejecting traditional power holders while broadening its coalition, and demanding more than wages and working conditions in its contract negotiations. The success of these policy demands is important, too, though these should be seen as longer-term goals with an approach to social movement unionism that recognizes the gradual nature of success.

## **Background**

CTU evolved from the all-female Chicago Teachers' Federation and other smaller groups, officially becoming the Chicago Teachers Union in 1937.<sup>2</sup> Even before that time, women worked together to help found the American Federation of Teachers (AFT), which CTU is still a part of

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<sup>2</sup> "CTU History," The Chicago Teachers Union, accessed April 23, 2021, <https://www.ctulocal1.org/about/history/>.

today.<sup>3</sup> It was not until 1966, however, that the city recognized CTU as the official bargaining representative for Chicago public school teachers.<sup>4</sup> For decades after their recognition, CTU threatened to strike nearly every year and “it seemed like a strike vote was the necessary prerequisite to a contract agreement.”<sup>5</sup>

In the 1980s, the Reagan administration pushed the narrative that public schools, especially Chicago public schools, were America’s largest problem. The solution, according to many think tanks and politicians, were neoliberal policies that emphasized market-based solutions over public spending. CTU continued its efforts to strike, but without a strong coalition of parents and community members to support their vision of reform, there was little the union could do to combat the widespread vilification of their union and their district. In 1987, CTU took to the streets for what would end up being their last strike until 2012. After four weeks of fighting, teachers felt defeated. As the *Chicago Tribune* wrote, “given the militant teachers union, the beleaguered board, the intractable financial shortfall and the dismal academic performance of so many students, what hope is left for the school system -- and the city?”<sup>6</sup> While this project does not analyze the actions of CTU during that 1987 strike, the decline in union activism and militancy is important to recognize. CTU certainly lost political capital when parents and power holders turned against them, but it is also useful to question whether burnout among militant unions is inevitable if the union is striking as frequently as they were during this

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<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

<sup>5</sup> Ron Grossman, “A Labor History Lesson: Union-CPS Dispute Hardly Novel: 9 Work Stoppages Hit Schools 1969-1987,” *Chicago Tribune*, September 9, 2012, <https://search-proquest-com.proxy.mtholyoke.edu:2443/newspapers/labor-history-lesson/docview/1038489025/se-2?accountid=12605>.

<sup>6</sup> “A Dismal End to a Sorry School Strike,” *Chicago Tribune (Pre-1997 Full text)*, October 6, 1987, <https://search-proquest-com.proxy.mtholyoke.edu:2443/chicagotribune/docview/291060177/fulltext/276DA0E632CF4D7APQ/1?accountid=12605>.

period. Is there a point at which even the most engaged unions will begin losing engagement? This period offers an opportunity for further scholarly research within the framework of social movement unionism.

Shortly after the 1987 strike, the death of Chicago's first Black mayor, Harold Washington, created a power vacuum at the height of these school reform battles. Legislators in Springfield, under immense pressure from outside organizations to reform education, narrowly passed a bill called the Chicago School Reform Act, granting parents more control over their children's education and residents more control over their school board. This was seen as a positive step by many, especially those who felt that the mayor-appointed school board created an unaccountable and corrupt district. These changes, however, would not last long. The state's most powerful players were already crafting new legislation that would serve as a barrier to union power and the possibility of teacher-driven reform efforts.

Known for its corrupt Democratic party machine politics, it is no surprise that Chicago mayors have always held outsized control over the city's public school systems. Because of its top-down political system, Chicago remains one of the only cities in the country with a mayor-appointed school board.<sup>7</sup> In 1989, Mayor Richard M. Daley helped push through a new education reform bill in Springfield, centralizing power even more than before and allowing him to appoint his own five-person school board and a CEO of Chicago Public Schools (CPS). He also insisted the law tighten restrictions on bargaining issues, making it harder for teachers in the city to strike. This bill passed through a Republican-held senate largely because of its anti-union rhetoric. Daley's political confidant and chairman of the Chicago School Finance Authority,

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<sup>7</sup> Juan Perez Jr., "90% of U.S. school boards are picked by voters, but not in Chicago. Here's why that could change," *Chicago Tribune*, April 19, 2019, <https://www.chicagotribune.com/news/ct-met-chicago-elected-school-board-debate-20190418-story.html>.



Mike Koldyke, helped convince the Republican senate to pass the bill by saying, “Listen.... You gotta back this [school reform plan] because this is the best way to stick it to the unions.”<sup>8</sup> With unprecedented power over many aspects of CPS, Daley and his CPS CEO Paul Vallas immediately went to work and “closed bad schools, fired bad teachers, instituted mandatory summer school for low performers, and launched the largest early childhood education program in the county.”<sup>9</sup> These “bad” schools and teachers, though, were not necessarily the root problem of education in Chicago. Many teachers felt frustrated at their lack of job security and harsher expectations without increased resources. As the Daley years wore on, the early seeds of a more militant unionism began to grow.

In 2001, rank-and-file union members showed their hopes for this kind of unionism when Deborah Lynch, the founder of the ProActive Chicago Teachers & School Employees caucus (PACT), defeated the United Progressive Caucus (UPC) leadership that had been in power for decades to become president of the Chicago Teachers Union. This represented a massive upset for the establishment union leadership, especially after CPS CEO Vallas had come out in support of the incumbent, Tom Reece.<sup>10</sup> Vallas’s endorsement shows that UPC leadership had not been practicing social movement unionism and instead building close relationships with power holders. The very fact that rank-and-file members rejected the candidate supported by the other side of the bargaining table showed a shift away from the complacent relationship between CTU and the City. Also represented in this victory was the leadership efforts of Deborah Lynch, who organized among rank-and-file teachers on a platform beyond the monetary aspects of contract

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<sup>8</sup> Keith Koeneman, *First Son: The Biography of Richard M. Daley* (Chicago: University of Chicago Press, 2013), 160.

<sup>9</sup> Ibid, 162.

<sup>10</sup> Ashby, *Fight for the Soul*, 33.

negotiations.<sup>11</sup> The three tenets of social movement unionism -- leadership, relationships, and policy changes -- all had some role in this new leader's platform and strategy.

Unfortunately for the PACT caucus and those seeking this new kind of unionism, Lynch lost reelection only three years later to UPC by only 566 votes (out of over 22,000). The new UPC president, Marilyn Stewart, promised to return to a focus on monetary issues and basic working conditions. Two years later, the Daley administration announced its new "Renaissance 2010" plan, which proposed even more mayoral control and what many teachers saw as a threat to public education. Frustration only grew when the administration announced its "plan to close some eighty poorly performing schools over four years and replace them with one hundred privately run charter or contract schools, whose teachers were not required to be certified by the state, received lower salaries, and were barred from joining the Chicago Teachers Union."<sup>12</sup> At this point in time, only 52 charter schools were present in the city, compared to well over a hundred today.<sup>13</sup> Still, charter schools started to be perceived as a threat as more students began attending these schools, which reduced funding for public schools. A pattern of mayoral control, school closings, and open hostility to union members left CTU with few options aside from large-scale, radical organizing. The stakes were too high to continue the pattern of cozy negotiations between a hostile CPS and a union leadership completely disconnected from the classroom.

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<sup>11</sup> Ibid, 34.

<sup>12</sup> Andrew J. Diamond, *Chicago on the Make: Power and Inequality in a Modern City* (Berkeley, CA: University of California Press, 2017), 160.

<sup>13</sup> Institute on Metropolitan Opportunity, "Charter Schools in Chicago: No Model for Education Reform," *University of Minnesota Law School*, October 2014, <https://www.law.umn.edu/sites/law.umn.edu/files/newsfiles/8a690b58/Chicago-Charters-FINAL.pdf>.

## Leadership

In order to achieve new results from contract negotiations, a small group of teachers believed it was necessary to take a more militant approach to union leadership. This section looks at the process CORE leadership used to activate its membership in the context of social movement unionism. To operationalize this section, the category of leadership is broken into two central questions. First, does the union leadership represent the voices of the rank-and-file members and are they prioritizing accountability to those who elected them? While typical union leadership is often characterized as an out-of-touch group of technocrats, social movement unionism encourages leadership from within the rank-and-file membership that remains connected to the people who elected them. Second, are the rank-and-file members of the union active and passionate about the issues their union fights for? Are there opportunities for leadership development for members who may have previously been disengaged from the union? Centrally, the leadership aspect of social movement unionism asks how the union remains activated, engaged, and accountable to grassroots voices.

### *Union Leadership*

After a particularly unpopular contract in 2007 and President Stewart's support of a proposal to cut 10% of staff, a group of rank-and-file teachers decided that it was time for new leadership. This group started small, with teachers like Jackson Potter, Jesse Sharkey, Karen Lewis, and others getting together to study the effects of charter schools and neoliberal education policy on their classrooms. As they read, they began to contextualize their situation within the broader sphere of urban politics.<sup>14</sup> The group did not initially plan to run against union leadership, which

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<sup>14</sup> For a more detailed look into the founding of CORE, see Ashby, *Fight for the Soul*, 63-66.

may have been advantageous for the group to attract genuinely engaged members. Initially, they attempted to push the current union leadership to be more militant against school closings while building relationships with parents and neighborhood groups to gain more support to keep schools open. As their group CORE grew and UPC leadership remained unresponsive, members realized their potential to truly change the union. After two years of organizing, CORE began preparing for the May 2010 election using a bottom-up, grassroots strategy to gain support in every school in the district. This was a departure from previous leaders, who relied on a strong incumbency advantage and did not make an effort to campaign in every school in the district. This is an important asset for social movement unionism, where elected leaders rely on creating an energized base of supporters. This pre-election organizing, in turn, mobilized union membership by creating relationships even before being elected to leadership positions.

For CORE to go against a strong incumbent caucus, it needed to combine its anti-neoliberal rhetoric with a strong leader who was accountable to and representative of the community. In 2010, CORE members nominated Karen Lewis, the child of two Chicago public school teachers and a high school chemistry teacher, to head the caucus as candidate for President in that year's union leadership elections.<sup>15</sup> Lewis represented the perfect candidate for CORE, a Black woman with roots in Chicago and a commitment to activism, social justice, and her students. CORE continued to grow, finishing in second place in the first round of elections and turning out thousands of teachers for rallies leading up to the runoff election in May. Lewis garnered massive support as a regular teacher connected to the classroom and informed about the

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<sup>15</sup> Interestingly, Lewis attended Mount Holyoke College, just as the author of this project does. Ashby (Ibid, 67) writes of her education, "She first went to the progressive, all-women Mount Holyoke College in Massachusetts, then transferred in 1972 to Dartmouth College shortly after it began to admit women, graduating in 1974 with a degree in sociology and music. But she hated her experience there, because the male students opposed the Trustees' decision to open up the school to women, and she was the sole African-American female student."

systematic issues facing Chicago Public Schools and its students. In the end, CORE won 59% of the vote, decisively defeating the status quo and ushering in a new era for CTU. On the night of her victory, Lewis stated, “CORE’s success is we are a big-tent, grass-roots group led democratically from the bottom up. That was why CORE began in the first place -- to activate and energize all members in running the union. It also turned out to be a winning campaign strategy.”<sup>16</sup> The mandate for activism and militancy was there, but the barriers to change continued to grow, presenting profound obstacles for the new leadership. CORE’s victory was grounded in an organizing strategy that would set them up for success in further internal and external mobilization, something that makes their practice of social movement unionism more achievable right away. More broadly, social movement unionism can be more successful when its foundation includes strong leadership, like that of Karen Lewis, and an already activated base of support for newly elected leaders. Strong incumbency advantage serves as a barrier for the more militant and progressive wings in many unions, but if a caucus can successfully organize enough support to get elected, it may indicate a capacity for further success as the skills for mobilization serve leaders well in practicing social movement unionism.

In June 2011, only a year after the election of CORE to CTU leadership, Democratic Governor Pat Quinn signed a law known as “SB7,” now classified as Section 4.5 of the Illinois Labor Relations Act. After years of lobbying Republican and Democratic politicians, education reform groups like Stand for Children successfully convinced the Illinois government to strictly limit future teacher strikes.<sup>17</sup> Not only did this law increase the share of members needed to authorize a strike, but it also severely limited the acceptable reasons for striking and added

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<sup>16</sup> Ibid, 68-69.

<sup>17</sup> Uetrict, *Strike for America*: These groups often used broad messaging to gather support, they were often primarily funded by Republicans who have publicly criticized public schooling and teachers unions, including the soon-to-be Governor Bruce Rauner.

lengthy bureaucratic barriers to striking. Lawmakers and city leaders assumed that with these barriers, the threat of strikes had largely disappeared, despite a more militant union. CORE leadership and rank-and-file members quickly proved those assumptions wrong.

During this time, Chicago also elected a new mayor, Rahm Emanuel. A star on Bill Clinton's fundraising team, he was known for his harsh donor tactics and unreasonable work expectations of staff. His obsessive fundraising mindset continued in Chicago, where the *Chicago Reader* found that the mayor spent almost all his time with businessmen, including many Republican donors, raising money for his political ambitions, and rarely met with labor or community leaders.<sup>18</sup> Chicagoans elected the mayor largely due to his name recognition and massive campaign resources, not because of close ties to the city or personal relationships with organizations. Also during his time in the Clinton administration, Emanuel encouraged the president to pass the North American Free Trade Agreement, the 1994 crime bill, and stricter immigration policies. All of these set him up to be on the opposing side of the more progressive community organizations and activists in the city. After his time in the Clinton administration, Emanuel made millions a year as an investment banker, recruited right-leaning candidates for the Democratic Congressional Campaign Committee, and became President Barack Obama's White House chief of staff. During his time in the White House, Emanuel even tried to scale back the Affordable Care Act before its passage, indicating a commitment to neoliberalism by consistently favoring free-market policies.<sup>19</sup> And still, in 2011, Democrats in Chicago elected Rahm Emanuel as mayor with 55 percent of the vote. Labor unions with progressive leadership and membership, like CTU, knew he would likely serve as yet another barrier to their successes.

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<sup>18</sup>Ben Joravsky, "The Mayor's Millionaire Club," *Chicago Reader*, October 27, 2011, <https://www.chicagoreader.com/chicago/who-has-access-to-mayor-rahm-emanuels/Content?oid=4887900>.

<sup>19</sup>Rick Perlstein, "The Sudden but Well-Deserved Fall of Rahm Emanuel," *New Yorker*, December 31, 2015, <https://www.newyorker.com/news/daily-comment/the-sudden-but-well-deserved-fall-of-rahm-emanuel>.

That proved to be true during the first contract negotiations between CTU and Mayor Emanuel's newly appointed Board of Education and CPS officials. As relationships soured, pressure grew to fight for the policies CORE ran on.

In August 2012, a year after the implementation of Section 4.5 and with a new mayor in power, the Chicago Teachers Union voted overwhelmingly to go on strike for the first time in decades. CTU's official statement of strike referenced the bill but explicitly rejected its premise while remaining somewhat compliant. Lewis wrote, "While the new Illinois law prohibits us from striking over the recall of laid-off teachers and compensation for a longer school year, we do not intend to sign an agreement until these matters are addressed."<sup>20</sup> Leadership within the union, backed by a strong cohort of rank-and-file members, were not going to sit idly by and accept the bare minimum from CPS any longer. While restrictive labor laws may serve as a barrier to success for many unions, CTU's nuanced approach to the issue shows that it is possible for unions to overcome these challenges with the right leadership and strategy.

Perhaps even more successful than the union's capacity to strike despite the heightened barrier of Section 4.5, CTU leadership was willing to strike despite some wins in the contract negotiations already. Under previous union leadership, the proposed contract before the strike would have likely been accepted and received as a modest win for the union. In its declaration of strike, President Lewis even stated that the negotiations had been successful in expanding arts, language, technology, and physical education classes. She also stated that CPS would provide textbooks more quickly and restore jobs for more than 500 members who had been affected by closing schools. Lewis even admitted, "recognizing the Board's fiscal woes, we are not far apart

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<sup>20</sup>"Press Release: CPS Fails to Negotiate Fair Contract to Prevent First Strike in 25 Years," *Chicago Teachers Union*, September 10, 2012, <https://www.ctulocal1.org/posts/press-release-cps-fails-to-negotiate-fair-contract-to-prevent-first-strike-in-25-years/>.

on compensation.”<sup>21</sup> For a union that had withstood decades of bleak contract negotiations under the Daley administration, this contract could have been enough for past leadership as it addressed the issues of wages and even expanded certain teaching conditions. Lewis, however, had other plans. She continued in her statement of strike to point out that CPS offers on some bread-and-butter issues such as healthcare benefits and job security were not yet acceptable. This is a clear indication of a shift towards social movement unionism, with broader policy demands and a militant leader willing to strike.

Union leadership has the ultimate authority over when to stop negotiating and bring a contract to the delegation for approval, so the act of continuing to negotiate showed a change in leadership style and priorities. Lewis, driven by other CORE members and their agenda, expanded the acceptable, demanding more than what was offered, including air conditioning in classrooms, which was a basic need for many schools in the District. She continued the statement of strike with a scathing critique of the new teacher evaluation procedures, saying, “there are too many factors beyond our control which impact how well some students perform on standardized tests such as poverty, exposure to violence, homelessness, hunger and other social issues beyond our control.”<sup>22</sup> This is an important recognition of the systematic barriers to student achievement that the previous UPC leadership generally avoided and another practice of social movement unionism. While this statement does represent a change in policy priorities, something discussed later in this chapter, the clarity in which union leadership spoke about these issues also contributes to the mobilization of union into a kind of social movement, the essential first step for social movement unionism. Even during the union’s last strike in 1987, teacher discussions

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<sup>21</sup> Ibid.

<sup>22</sup> Ibid.



were centered around pay and benefits, with rank-and-file members disappointed that leaders eventually caved on issues of class size.<sup>23</sup> With this new, more radical leadership, the issues worth fighting for rapidly broadened, changing the culture within the union to favor activism, grassroots organizing, and militancy.

### *Rank-and-File Membership*

CORE's name, the Caucus of Rank-and-File Educators, explicitly points to its members as the priority, perhaps in an attempt to eliminate the hierarchical, out-of-touch leadership style of decades past. This rank-and-file activism would serve to strengthen the union, creating militant teachers in the streets of Chicago while also building up leadership opportunities for rank-and-file members within the school system. Teachers saw CORE leadership as intelligent, passionate, and trustworthy, which in turn activated the base of the union and allowed the movement to grow.

This trust in the new leadership as well as their militancy and willingness to fight on a broader range of issues ignited participation in the union for many teachers. In this way, the leadership's decision to fight may have actually allowed more teachers to tune into the caucus' message and provided an avenue for engagement on these issues that had not previously been discussed. Laura Ferdinand, a CTU rank-and-file member, says of the union:

When it came time to join our union, I got a slip of paper in my school mailbox. That's all I basically did. You know, it's a really big union... and for a long time I just kind of took it... not for granted but I didn't really think much about it at all. And I think also that's because of my position in the district; I was brand new, and I was not clamoring for any sort of leadership roles or opportunities, and so I was just teaching. It wasn't until the

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<sup>23</sup> Michele L Norris, "Teachers Re-Elect Vaughn," *Chicago Tribune (pre-1997 Full Text)*, May 25, 1988, <https://search-proquest-com.proxy.mtholyoke.edu:2443/chicagotribune/docview/282391636/CFE2CB5AA2314444PQ/10?accountid=12605>.

threat of the strike started to ramp up that I was like, “Oh, this is a machine. This is an operation that I need to become more familiar with.”<sup>24</sup>

Even before the threat of the strike, there were clear efforts to engage rank-and-file members with the union’s goals. Instead of a typical union model of “servicing,” where members mostly only came into contact with the organization when they wanted to file a grievance or achieve some tangible good, CORE implemented active structures in order to become a presence in all teachers’ lives. They created a union organizing department and executed training for teachers in an array of issues. It was a strategy where “teachers themselves were going to be carrying out the union’s broad agenda for educational justice.”<sup>25</sup> True to its name, the Caucus of Rank-and-File Educators used these activist and organizing principles to ensure that it had the membership capacity to fight for the issues it believed in. This was a risk for CORE, as some teachers would see this shift as politicizing what many want to stay a “servicing” organization. That is an inherent risk of social movement unionism that could backfire if the rank-and-file is not generally committed to a unified ideology.

The risk began paying off almost immediately. During this strike, the rank-and-file membership only grew more dedicated to the union and its fight for justice. Teachers reported immense comradery during the strike despite the grueling long days and loss of pay. John Boggs, a high school teacher, recalls being in the streets with his co-workers, saying, “2012 was... man. It was amazing. I hate to say fun because it’s a strike, and it was painful. It was a very frustrating time, but there was a lot of comradery that happened in that strike also. There was a lot of, just, ‘we’re not going to take it anymore.’”<sup>26</sup> That recognition of sacrifice and pain combined with the

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<sup>24</sup> Laura Ferdinandt (rank-and-file CTU member), in discussion with the author, October 2020.

<sup>25</sup> Uetrict, *Strike for America*, 38.

<sup>26</sup> John Boggs (CTU delegate), in conversation with the author, November 2020.

sense of community and action is a common thread among teachers when thinking about the 2012 strike. This is important for the practice of social movement unionism, as it is clear that striking during CORE's first contract negotiation helped continue the momentum created during their election and further mobilize their base. The possibility for successful social movement unionism without a strike remains an unanswered question in the academic literature, but it is clear that strikes can allow for further organizing, consciousness-raising, and skill building.

### **Relationships**

The second practice of social movement unionism -- a radical shift in relationships -- brings the motivated and well-organized movement of rank-and-file educators into the streets and into the negotiating room. There are two key types of relationships that change with social movement unionism: the union strengthens its relationship with the community and distances itself from governmental and business interests on the other side of the bargaining table.

Chicago, just like other major cities, has a long history of community organizing and activism from neighborhood associations and non-profit organizations. These groups help drive the political and cultural conversation of cities, doing the daily work to elevate underrepresented voices and consistently holding the government accountable for their actions. Barack Obama's famous backstory as a community organizer in the South Side of Chicago is an example of the strength these organizations have in Chicago politics and culture.<sup>27</sup> Unions have great potential to join with these community organizations and expand their reach towards common goals. Social movement unionism seeks to strengthen those relationships (or begin building them). For teachers' unions, these community connections also include parent connections. Parents have a

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<sup>27</sup> Serge Kovalski, "Obama's Organizing Years, Guiding Others and Finding Himself," *New York Times*, July 7, 2008, <https://www.nytimes.com/2008/07/07/us/politics/07community.html>.

specific kind of power when it comes to driving the public perception of a teacher strike or even the state of public schools. If parents and the union have a strong connection and parents are able to understand the real reasons for union action, public support for the teachers' causes will only grow and those in power will feel more threatened. This creates a deeply embedded power across vast social circles all around the city.

Traditional, business-oriented unionism relies on close relationships between the union leadership and the bargaining partners, whether that means the local government, a company, or a school district. Under the leadership of the United Progressive Caucus, CTU had close ties to the Daley administration and the mayor's loyal appointees to the Chicago Board of Education and the Chicago Public Schools administration. Unions, often a reliable faction of the Democratic Party's base, rarely criticized party leaders and candidates, instead joining with them to defeat more anti-union Republicans. Social movement unionism flips this on its head, understanding that the Democratic Party may be more favorable to unions than Republicans but clearly establishing distance from those on the other side of the negotiating table. If a union can build enough grassroots support, they no longer have to rely on close relationships with elected officials. The capacity to openly reject certain claims or offers by people in power allows the union to take advantage of its grassroots, internal power, and its newfound power in the community, meaning the union can ask for more than just the basics in contract negotiations.

### *Power Holders*

It would be extremely difficult, if not impossible, to find a CTU teacher that wholeheartedly supported Mayor Rahm Emanuel. From his election until the end of his term, the mayor and CTU battled on countless issues. Not only did this aid in solidifying CTU's role as a militant

fighter, practicing social movement unionism by distancing themselves from those in power, but it was also only one piece of the union's larger, wholesale rejection of the Democratic Party establishment. The Democratic Party in Chicago could no longer rely on Chicago teachers to blindly support their policies and candidates.

In the 2011 race for mayor, CTU declined to endorse a candidate after failing to arrive at a consensus. President Karen Lewis said of the decision, "our 30,000 members are independent thinkers who will vote... They know what is at stake and will vote for the candidate they believe will improve schools and improve the system."<sup>28</sup> Though a few activists were on the ballot, the four major candidates for mayor represented a continuation of either the Daley administration or the general Democratic Party establishment. Candidates included the former chief of staff to Mayor Daley, the city clerk of Chicago, a former U.S. senator from Illinois, and the former White House chief of staff. Each came with decades of experience in party politics. In 2011, it did not seem that change was on the ballot. Rahm Emanuel, running on his experience in the Obama administration, won 55% of the votes, avoiding a run-off election and beginning the post-Daley era of Chicago politics. The two progressive activists collectively got 2.5% of the vote.<sup>29</sup> The election of the progressive, grassroots-oriented CORE at the same time as the centrist, establishment Emanuel set up a clear distinction between the city as a whole and union membership even before contract negotiations began.

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<sup>28</sup> George N. Schmidt, "CTU fails to endorse mayoral candidate, targets aldermanic races in 25 of 50 Chicago wards, endorses Susana Mendoza for City Clerk," *Substance News*, February 15, 2011, <http://www.substanceneews.net/articles.php?page=2010>.

<sup>29</sup> Monica Davey and Emma Graves Fitzsimmons, "Emanuel Triumphs in Chicago Mayoral Race," *New York Times*, February 22, 2011, <https://www.nytimes.com/2011/02/23/us/chicago-mayor-election.html>.

Once negotiations began, the already shaky relationship between the mayor and CTU quickly went downhill. Unsuccessful negotiations also elevated past concerns and difficulties brought by the former administration. One teacher, Laura Ferdinandt, says of the strike:

I don't necessarily think that in 2012 that it was Rahm, but it was the lack of accountability for the whole Daley administration coupled with a new administration that was making decisions that people didn't feel comfortable with and then, you know, right out of the gate basically Rahm said, "I don't care about what teachers need or want and I'm going to use them for my own gain." And so that did not set us off on the right foot.<sup>30</sup>

The connection drawn between Emanuel and the Daley administration shows the underlying resentment many teachers held towards the decades of unresponsive union leadership, despite consistent attacks on the future of public education in the city. During the strike, union leadership was not afraid to call out Emanuel directly, often blaming him personally for the state of education and the stances of the entire CPS and city negotiating team. While Emanuel certainly was not single-handedly responsible for the state of education in the city as a newly elected mayor, CTU's strategy to connect political leaders with the negative effects of neoliberal policies is a practice closely in line with social movement unionism. Emanuel's supposed plans to destroy public education became a rallying cry for CTU members, expanding its base of supporters within the union and across the city. Of course, Mayor Emanuel did not state that he wanted to destroy public education, but his rhetoric during the negotiations and his insistence on closing "underutilized" schools was seen as a real threat by CTU members.<sup>31</sup> Another rank-and-file teacher, John Boggs, describes the effects of this targeted frustration, saying:

Rahm Emanuel was such a bully, and I think that he just thought that teachers were going to put their tails between their legs and just listen and do what we were told, and no, we weren't. At that time, he didn't want to give us raises, he wanted to extend the school year, he wanted to extend the school time, he didn't feel like we were doing our job, and I

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<sup>30</sup> Laura Ferdinandt, in conversation with the author, October 2020.

<sup>31</sup> Valerie Strauss, "When it's not his children's school," *Washington Post*, April 20, 2013, <https://www.washingtonpost.com/news/answer-sheet/wp/2013/04/20/when-its-not-his-childrens-school/>.

mean, our job is so incredibly hard. And no one gets it because if you work in the suburbs, you're pretty much just a teacher. On Friday, I had a kid who called me and said they didn't have a home... I mean it's just a very hard job and I think that Rahm Emanuel underestimated the union and what we would do.<sup>32</sup>

Rank-and-file members finally had union leadership that spoke directly to their daily struggles. They had a union president who had been in the classroom with them only a year earlier. At a union-wide level, there was finally a recognition of the impossibility of teaching with the current resources, but the city had not moved any closer in understanding that need. While not confirmed, Lewis claimed that Emanuel told her that 25% of CPS students are destined to fail, so he had no interest in “throwing money” at the problem.<sup>33</sup> This is not the kind of rhetoric that brings labor and the Democratic Party closer together, but rhetoric that galvanizes activists and the public against a new common enemy.

The union's direct targeting of the mayor “specifically represents a significant break in the union-Democratic Party relations.”<sup>34</sup> How could the union continue to blindly organize for a party that consistently ignored their voices? The anti-Emanuel rhetoric broadened to an anti-neoliberal Democrats rhetoric. The union still firmly opposed the Republican Party and their policies, but they also called out Democrats for working closely with Republicans to further anti-labor, anti-public school agendas. During the strike, teachers took to the streets to fight against performance-based teacher evaluations and the expansion of charter schools. The underlying reality was that “CTU was fighting policies that were central to Obama's education reform agenda.”<sup>35</sup> President Obama's Race to the Top program, a plan that contained many of these

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<sup>32</sup> John Boggs, in conversation with the author, November 2020.

<sup>33</sup> “Emanuel Disavows 25% of School Kids, Says CTU,” *NBC Chicago*, February 27, 2012, <https://www.nbcchicago.com/news/local/rahm-emanuel-concerned-about-three-fourths-of-school-children/1950575/>.

<sup>34</sup> Uetrict, *Strike for America*, 95.

<sup>35</sup> Uetrict, *Strike for America*, 96.

neoliberal policies, was implemented by Arne Duncan, the secretary of education and former CEO of Chicago Public Schools, so there was a personal element even to the teachers' negative feelings about national education policy. The program itself, however, pushed all the policies that CTU teachers despised. Race to the Top focused on competitive grants, performance-based teacher evaluations, and the removal of barriers to expand charter schools.<sup>36</sup> Chicago's top neoliberal policy makers, from Arne Duncan to Barack Obama to Rahm Emanuel, brought the very issues at the bargaining table to the White House.

Even before striking in the streets, CTU members brought this fight to a national level, holding protest signs against the program at an American Federation of Teachers (AFT) convention in July 2012.<sup>37</sup> During the convention's celebratory endorsement of Obama, Lewis declined an invitation to join fellow union presidents onstage, saying, "I don't want to be up there." Instead, she stood with her fellow CTU members, all dressed in their uniform red shirts and holding "Stop Race to the Top" signs. Shortly after, Dr. Jill Biden introduced her husband, Vice President Joe Biden, as a "man who has always been a supporter of teachers and education." The crowd went wild, a sea of blue shirts chanting "four more years!" Still, the CTU rank-and-file stood together, holding their signs in unity, with Lewis's arms crossed across her chest.<sup>38</sup> After the main program of the convention, CTU members handed out leaflets describing the effects of Race to the Top, demanding that the administration say, "No to privatization, no to over-testing, no to merit pay, yes to small class sizes, yes to early childhood education, yes to wrap-around services." A CTU member continues, saying, "we think we know what's better for

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<sup>36</sup> For more information, see: "Race to the Top Fund," *U.S. Department of Education*, accessed April 23, 2021, <https://www2.ed.gov/programs/racetothetop/index.html>.

<sup>37</sup> GEMNYC Grassroots Education Movement, "AFT Convention - Biden Speech - Chicago Teachers Say STOP RACE TO THE TOP," YouTube video, 5:43, August 3, 2012, <https://www.youtube.com/watch?v=C0MRDhndDAs>.

<sup>38</sup> *Ibid.*



the classrooms than Obama and Biden.” Another member chimed in, saying, “it’s not just Republicans that have bad education policy. We’ve got Rahm Emanuel, a leader in the Democratic Party, trying to bust our union in Chicago. We want to make sure that people understand that.”<sup>39</sup>

Conversations like this continued throughout the convention and back home in Chicago, where the union remained divided on even endorsing President Obama.<sup>40</sup> While they eventually agreed to endorse Obama, members and leadership alike expressed disappointment in his national politics and close ties to Emanuel.<sup>41</sup> Clearly, this is a departure from typical support for Democrats up and down the ballot. Chicago teachers would no longer accept policies they disagreed with, even if they came from the party they preferred. Making change within the union also meant making changes with how the union related to the Democratic Party, the mayor, and all other decision makers. This departure is closely in line with social movement unionism and shows that even as leadership focuses on internal organizing, some external rejection of power holders is useful to create a common enemy and energize its base.

### *Coalition Building*

Rejecting corporate elites and the powerful neoliberal platform of the Democratic Party certainly could have hurt CTU’s capacity to win at the bargaining table. This is an inherent risk of social movement unionism that can create difficulty for unions, especially in the first negotiation cycle where broader political capital has not been built yet. Publicly calling out CPS leaders, Board of Education members, and the mayoral administration would have been seen by leaders of past

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<sup>39</sup> Ibid.

<sup>40</sup> Uetrict, *Strike for America*.

<sup>41</sup> Mike Elk, “Chicago Teachers Strike Headache for Democrats,” *In These Times*, September 11, 2012, <https://inthesetimes.com/article/chicago-teachers-strike-headache-for-democrats>.

union caucuses as a terrible move, making it impossible to convince CPS to give in to any demands. What CORE members believed, however, was that building a grassroots movement and tapping into citizen resentment of neoliberal policies could effectively replace the need for cozy corporate relationships. Instead, these teachers imagined that the people power in the streets would effectively sway public opinion and put enough pressure on CPS to give teachers and students a better deal.

CTU leaders began building these relationships even before the 2012 strike, joining groups already organizing against Tax Incremental Financing (TIF) implementation. This funding tool was designed to “promote public and private investment across the city” by designating specific “districts” where all property tax growth over a set amount of time can be used for “redevelopment projects within the district.”<sup>42</sup> Activists and progressive groups criticized this program as a way to give public tax revenue to wealthy corporations to build developments that would further the harmful effects of gentrification. In 2010, two years before the strike, teachers joined the Grassroots Collaborative and Stand Up!, two groups dedicated to closing tax loopholes and getting rid of the TIF program.<sup>43</sup> The Grassroots Collaborative represented organizations including the Illinois Hunger Coalition, the Chicago Coalition for the Homeless, the Jane Addams Senior Caucus, and two unions.<sup>44</sup> Neighborhood-specific groups also joined this coalition to create diversity in geography, issue focus, and organizational structure. These actions tied CTU more closely to an anti-neoliberal policy focus and showed that they were willing to show up for organizations and movements even when they were not explicitly related to the union, education policy, or their contract negotiations. This form of long-

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<sup>42</sup> “Tax Increment Financing Program,” *City of Chicago*, accessed April 23, 2021, [https://www.chicago.gov/city/en/depts/dcd/supp\\_info/tax\\_increment\\_financingprogram.html](https://www.chicago.gov/city/en/depts/dcd/supp_info/tax_increment_financingprogram.html).

<sup>43</sup> Diamond, *Chicago on the Make*, 330.

<sup>44</sup> “Who We Are,” *Grassroots Collaborative*, accessed April 23, 2021, <https://grassrootscollaborative.org/>.

term relationship building would prove to be an essential asset for the union, especially in the next contract negotiation where the union couldn't rely on the energy of a strike to get people into the streets in support.

Also before the 2012 strike, CTU delegates voted to endorse the Occupy Chicago branch of the Occupy Wall Street movement. In their press release, they noted that the movement aims to “fight corporate abuse. Locally, these abuses take the form of TIFs, toxic bank swaps, and pay-to-play politics.”<sup>45</sup> Already, the union was aligning itself closely with these moments, using their momentum and policy-orientation to gather more people in the streets and even to effectively bypass the restraints of Section 4.5. This laid the foundation for future work with these groups and activists and articulated a clear connection between their struggle as a teachers union and the struggle of these progressive groups and individuals. In their statement of strike, Lewis wrote,

As we continue to bargain in good faith, we stand in solidarity with parents, clergy and community-based organizations who are advocating for smaller class sizes, a better school day and an elected school board. We join them in their call for more social workers, counselors, audio/visual and hearing technicians and school nurses. Our children are exposed to unprecedented levels of neighborhood violence and other social issues, so the fight for wrap-around services is critically important to all of us. Our members will continue to support this ground swell of parent activism and grassroots engagement on these issues. And we hope the Board will not shut these voices out.<sup>46</sup>

By building these relationships with the community before the strike, the union could draw on these issue-focused movements and point to their grassroots momentum while technically following the restrictions of anti-union policy. They were bargaining “in good faith,” but they “stood in solidarity” and “joined” with the groups that had the capacity to be more militant and

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<sup>45</sup> “CTU’s House of Delegates Endorses Occupy Chicago,” *Chicago Teachers Union*, October 20, 2011, <https://www.ctulocal1.org/posts/ctus-house-of-delegates-endorses-occupy-chicago/#:~:text=On%20October%2019%2C%202011%2C%20the.pay%2Dto%2Dplay%20politics>.

<sup>46</sup> “Press Release: CPS Fails,” *Chicago Teachers Union*.

outright in their fight against neoliberalism. They also could back up their claims that the community supported their efforts, adding more pressure on the City to hear CTU's demands. In hoping the Board would "not shut these voices out," CTU brought community organizations, activists, and the popular opinion of the city into the bargaining room.

Not every Chicagoan was completely on board with the strike. Parents, in particular, were left to find childcare and many had to sacrifice their own work in order to accommodate the strike. Some parents acted in support of CTU, understanding the policies at stake and organizing individually or in groups like Parents 4 Teachers.<sup>47</sup> This group focused on parent-to-parent outreach, putting out statements in English and Spanish emphasizing that parents and teachers wanted the same things for public schools. This work would put many parents on the side of teachers for the first time in decades, contributing to the grassroots momentum that followed CTU to the bargaining table. While parents were certainly relieved when the strike ended and they no longer had to scramble to find childcare, some parents did not support the strike from the beginning, agreeing with the mayor's rhetoric that strikes only hurt their students and that teachers should find other ways to resolve disagreements.<sup>48</sup>

Some teachers found that parental support varied quite a bit depending on which neighborhood they lived in and which school their children attended. During the 2012 strike, Laura Ferdinand taught in a higher income neighborhood, meaning that the parents often did not see the desperate need for resources in the schools a few miles down the street. She says,

We had this fleet of parents who were supposedly supporting public education in the city, and so on face value, we should not have gone on strike, our school should not have gone

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<sup>47</sup> Ervin Lopez, "Our Work: Parents and Teachers Want the Same Things for Our Schools," *Parents4Teachers*, September 23, 2019, [https://www.parents4teachers.net/our\\_work](https://www.parents4teachers.net/our_work).

<sup>48</sup> Bridget Doyle and Jennifer Delgado, "Parents Applaud Ordeal's End: Backers on Both Sides Relieved by Return to Classes," *Chicago Tribune*, September 19, 2012, <https://search-proquest-com.proxy.mtholyoke.edu:2443/chicagotribune/docview/1040947177/18920A2BC97243B5PQ/62?accountid=12605>.

on strike... Parents who were saying, “I just gave \$10,000 for a new computer lab, I want my kid to be in school,” or parents who would slam the door in the teachers’ face. I remember specifically a preschool teacher who is like an institution in our school went and knocked on the door of one of her students’ family’s home because she needed to use the restroom and the parent slammed the door in her face. That fueled more anger and division between the families and our staff because the families who claim to be pro-public education aren’t really pro-any of that. They are pro-opportunities for their kids, and so this just kind of unearthed all of that division even further.<sup>49</sup>

This division between neighborhoods certainly existed, but the strike also educated many teachers, parents, and community members living in more privileged neighborhoods about the realities of their fellow Chicagoans. Even if parents wanted their children to get back to school, it was impossible for them to ignore the conversations happening in the streets and on the news. These conversations may not be able to happen as effectively during peaceful times and without strikes, perhaps indicating a necessity for strikes at least as union leaders begin to organize the rank-and-file and community members in a practice social movement unionism. Teachers and activists demanded change in their city, gathering in the tens of thousands to demand that the district and all citizens better understood the threats neoliberal policies posed to the future of public education. These policy conversations represent the third shift in CTU towards social movement unionism.

## **Policy**

The most recognizable aspect of social movement unionism -- a radical shift in policy preferences -- is clear in the Chicago Teacher Union’s shift to new leadership and throughout the 2012 strike, though CORE’s first contract did not achieve many of their demands. This is unsurprising for a union practicing social movement unionism because it takes time to build the

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<sup>49</sup> Laura Ferdinandt, in conversation with the author, October 2020.

political capital necessary to win broader demands. Still, CORE brought issues broader than wages and working conditions to the bargaining table, even in an environment with legal and fiscal constraints. Yes, teachers deserved job security and a living wage, but how could teachers be successful without enough resources to afford supplies, updated textbooks, and support staff like nurses and librarians? As this question broadened demands, it also allowed teachers to question why the city consistently claimed there were not enough funds to meet those demands. CORE members started these conversations in living rooms around books and articles before they ever considered running for leadership. With only a few years since leadership changes and the start of relationship building, CTU could not have been expected to win every demand in this contract, even with a militant strike. This year's negotiations would begin to build a broader fight that continued in 2015-2016 and in 2019.

When Lewis issued a statement of strike on September 10, 2012, the demands could be sorted into two separate categories. First, the union issued tangible, contract-based demands. Even though the city had deep budget problems and a looming pension crisis, CTU members still had resource-based needs that were within their grounds for a strike. Second, the union demanded attention for broader issues beyond those that could be achieved during this contract round due to those financial and legal constraints. This meant that the union began a citywide conversation around the necessity for radical change.

### *Contract-Based Demands*

In the statement of strike, the union demanded specific contract changes, particularly the maintenance of existing health benefits, changes to the new evaluation system, job security, and reasonably fast installation of air conditioning. The union had already won specific agreements

on an increase in compensation, rights for nursing mothers, restoration of more than 500 teaching jobs, and first-day textbook availability. These demands were closely tied to the extension of the school day, which would make teachers do more with the same amount of insufficient resources.

Mayor Emanuel often spoke of the insufficient work hours for CPS teachers, criticizing Chicago's public schools for having one of the shortest school days in the country, which according to Emanuel created the idea that "teachers and principals and parents and students have to pick between social studies versus science; math versus music; reading versus recess."<sup>50</sup> Teachers pushed back on this rhetoric, saying that they would accept longer days for students only if they had additional pay, more classroom resources, and additional staff. CPS responded that the projected school budget deficit of \$700 million would not allow for this additional spending. In the end, the restoration of 500 teacher jobs only happened in order to solidify a 90 minute school day extension, allowing teacher hours to remain stable despite this lengthening of the day.<sup>51</sup> This was a loss for the union who was not necessarily opposed to lengthening the school day but wanted additional compensation, planning time, and resources.

As for the evaluation system for teachers, the Obama administration's aforementioned Race to the Top program required that schools include standardized tests as a "significant factor" in teacher evaluations, meaning up to 40% of teacher evaluations will place more emphasis on student test scores than on education or seniority. President Lewis addressed the consequences of this new evaluation system, claiming that nearly 30% of members could be discharged within two years. She stated, "This is no way to measure the effectiveness of an educator. Further, there

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<sup>50</sup> David Schaper, "Chicago Wants Longer School Day; Foes Want Details," *NPR*, April 23, 2012, <https://www.npr.org/2012/04/23/151047543/chicago-wants-longer-school-day-foes-want-details>.

<sup>51</sup> Dylan Matthews, "Everything you need to know about the Chicago teachers' strike, in one post," *Washington Post*, September 10, 2012, <https://www.washingtonpost.com/news/wonk/wp/2012/09/10/everything-you-need-to-know-about-the-chicago-teachers-strike-in-one-post/>.

are too many factors beyond our control which impact how well some students perform on standardized tests such as poverty, exposure to violence, homelessness, hunger, and other social issues beyond our control.”<sup>52</sup> The union’s dedication to protecting jobs is present in more traditional, business-oriented unionism. Still, Lewis explicitly connected the job insecurities to broader, systemic problems like poverty, which is much more in line with social movement unionism. In the final agreement, negotiators agreed that 30% of teacher evaluations would be based on student growth.<sup>53</sup> This is certainly more than teachers hoped for, but it still represented a win for CTU because new Illinois law required that 30% to be the minimum factor for student achievement in teacher evaluations.

Table 2.1 compares CTU’s initial demands to the final outcome in the contract agreement. Teachers won quite a bit, particularly on the issue of job security and rehiring, but it was not a perfect contract. Legal constraints, such as the new teacher evaluation requirements and the limits imposed by SB7 presented some structural barriers to an ideal CTU contract. Still, some smaller gains like more freedom in lesson planning and supplies reimbursement made a significant difference in the day-to-day lives of rank-and-file teachers. That, coupled with a pay raise and continued health benefits, resulted in an 80% “YES” vote by union members, the highest approval rate ever recorded for a teacher union’s contract.<sup>54</sup> Still, there was work to be done and many issues put on the back burner for the next round of negotiations.

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<sup>52</sup> “Press Release: CPS Fails,” *Chicago Teachers Union*.

<sup>53</sup> “Tentative Agreement: Agreement Between the Board of Education of the City of Chicago and the Chicago Teachers Union, Local No. 1, American Federation of Teachers, AFL-CIO,” September 2012.

<sup>54</sup> Ashby, *Fight for the Soul*, 227.



**Table 2.1: 2012 Contract Demands vs. Contract Results**

<b>CTU Demands<sup>55</sup></b>	<b>Contract Results<sup>56</sup></b>
Smaller class sizes	Maintained class sizes from prior agreement with no enforceability.
Provide all schools with physical education equipment and classes in art, theater, dance, and music.	Hires an additional 512 art, music, physical education, etc. teachers.
Provide every school with a library and librarians.	None.
Ensure schools meet national professional association recommendations for counselors, nurses, social workers, and psychologists.	Commits to hiring nurses and social workers if the Board receives new revenue.
Free transportation for low-income students.	None.
Reform discipline policies that currently place disproportionate harm on students of color.	Very few changes.
Access to pre-kindergarten and full day kindergarten for all students.	None.
Increase teacher salaries.	Double digit salary increases over 3-4 years, with increases to step pay structure and cost of living adjustments, though increases are smaller than that of the previous contract.
Provide more planning time and fewer restrictions on lesson planning.	Greater independence in lesson planning, but not additional time.
Hire more teaching assistants.	Commits to maintaining 900 teacher assistants at all times (9-5.3)
Commitments to address disparities that exist for bilingual students and those with special needs.	None.
Fix school buildings and make sure there is no asbestos, leaking roofs, or other problems.	No additional funds.

<sup>55</sup> Karen Lewis et al., “The Schools Chicago’s Students Deserve: Research-based proposals to strengthen elementary and secondary education in the Chicago Public Schools,” *The Chicago Teachers Union*, February 2012, [https://www.ctulocal1.org/blog-img/text/SCSD\\_Report-02-16-2012-1.pdf](https://www.ctulocal1.org/blog-img/text/SCSD_Report-02-16-2012-1.pdf)

<sup>56</sup> “Tentative Agreement” 2012.

Add air conditioning.	
Fund these proposals by allocating TIFs, creating a capital gains tax, and implementing a financial transaction tax.	None.
Avoid student performance-based evaluations.	Maximum 30% of evaluations based on student performance, minimum by state law.

### *Broader Demands*

Despite legal and financial barriers, union leadership and rank-and-file membership in the streets used the strike to call attention to the citywide attacks of neoliberal “reforms” that they felt only served the wealthiest individuals. Many teachers pointed to the solidarity with coworkers in their schools and in schools across the city as the most inspiring and influential part of the 2012 strike. For the first time in decades, all CPS teachers were in the streets, united around a demand for more resources for the schools that needed it most and finally starting to understand the clear inequities between neighborhoods. Laura Ferdinand says of the 2012 strike:

I think that’s when I started to really feel that rift between what I believed and my conditions. I believed all kids deserve the best education and the system I was working inside of was completely negating that. We were starving funds from other people who needed it. Our school was manipulating rules and opportunity in order to get what’s best for our kids. I don’t think people recognize how much competition there is between schools in the same city and how starved we are for resources. In an environment like that, the schools where the families have college educations and the mom stays at home but was a high-power marketing agent before having kids, those schools get everything they need and the schools that don’t have that get nothing. And that’s how I started to rethink my place in the district. It took a while to get there, but that was the turning point for me.<sup>57</sup>

Even the rank-and-file teachers who were not gathered around kitchen tables reading political theory and learning to analyze neoliberal policies like CORE’s founders began to understand the broader systems at play and the reasons for this lack of resources. The articulation

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<sup>57</sup> Laura Ferdinand, in conversation with the author, October 2020.

of these neoliberal policies in the streets was more accessible for the public and many teachers, expanding the practice of social movement unionism and affirming the positive effects of a strike on the practice of social movement unionism. Instead of accepting the lack of resources as an inevitable part of governing, CTU members asked why the city could not raise sufficient funds. They looked at TIF districts, where the city supposedly would use the funds raised from Equalized Assessed Valuation (EAV) of properties within specific areas to promote public and private investment and development.<sup>58</sup> In reality, these funds often went to private developments by already wealthy corporations instead of public schools or other public institutions. For CTU members, this was a “deliberate starvation of the city’s public schools of resources in favor of redistributing wealth upward to some of the city’s richest corporations.”<sup>59</sup> When teachers targeted this specific revenue stream for the city, they were able to effectively combat the City’s claims that there were simply not enough sources of revenue for any expansion of public school resources. This started before the strike, when CTU built relationships with community organizations and protested developments like the \$5.2 million in TIF funds granted for a new Hyatt hotel in Hyde Park, targeting franchise owner and Board of Education member Penny Pritzker.<sup>60</sup>

This lack of revenue was coupled with the privatization of services, a key aspect of neoliberal reforms. This strike played a major role in starting the conversation around charter schools and the spending of public money on private services. One rank-and-file teacher wrote in the *Chicago Tribune*,

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<sup>58</sup> “Tax Incremental Financing,” *City of Chicago*.

<sup>59</sup> Uetrict, *Strike for America*, 40.

<sup>60</sup> Pritzker’s husband, JB Pritzker, is now Governor of Illinois. For more information on this strike, see: “Teachers’ March Targets Pritzker Family; Traffic Downtown,” *CBS Chicago*, September 13, 2012, <https://chicago.cbslocal.com/2012/09/13/teachers-march-targets-pritzker-family-disrupts-traffic-downtown/>.

CPS wanted to close a large number of public schools and either turn them into turn-around schools or charter schools and the union is opposed to that, but specifically we're opposed to the idea that CPS can take a school, fire all of its teachers, and turn it into a charter school for the (sole) purpose of getting rid of highly-paid teachers and replacing them with inexperienced lowly-paid teachers.<sup>61</sup>

Rank-and-file teachers had the language to criticize the expansion of charter schools and coupled that with a critique on the city's distribution of resources. The expansion of charter schools was not just a way for the city to break up union power, it was also a way to reduce public costs and further prove that public schools were "failing," even though they just lacked necessary resources for success. This conversation would continue to grow after the 2012 strike, but its articulation during this moment was an important starting point for many in the city.

## **Conclusion**

On Wednesday, September 19, 2012, hundreds of thousands of CPS students returned to their classrooms. At that point, CTU delegates had agreed to a tentative contract agreement, though the union at large would still have to vote to approve the contract in the coming weeks. On that day, though, not much had immediately changed for teachers in their classrooms. Questions of funding, job security, and evaluations had been tentatively decided for the next few years, but it was clear that many issues remained unresolved. For now, exhausted teachers returned to the front of their classrooms.

The 2012 strike meant a lot more than the contract on paper could possibly depict. For the first time in at least fifteen years, a major union took to the streets demanding sweeping changes and won them to an extent, though social movement unionism requires time to build

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<sup>61</sup> Jemaan Rana and Whitney Young, "FYI: Why we Walked; The strike was no walk in the park, one teacher says," *Chicago Tribune*, September 20, 2012, <https://search-proquest-com.proxy.mtholyoke.edu:2443/docview/1069319495?accountid=12605>.

enough political capital to win more in the contract. In fact, if a union is able to achieve everything they want, perhaps they are not asking for policies broad enough to be considered social movement unionism. Still, the 2012 contract and, perhaps more importantly, the citywide conversation about inequities and injustice represented a significant departure from the unionism of decades past. Many teachers and community members in economically advantaged neighborhoods finally began to understand the dire need for basic resources in many schools just a few miles down the road. Chicagoans at large did not have access to quality public education, but many did not realize the extent to which this was affecting children and teachers every day.

The rise of CORE leadership showed that accountable, grassroots-oriented people can activate an entire organization, at least in the short term. It is undeniable that during the strike, the sea of teachers in the streets were motivated and inspired, ready to fight for their union and their public schools. At this point, it is important to question how long this kind of activism and engagement can last under new leadership and whether the solidarity from the strike can remain strong once teachers return to the classroom. Still, the internal organizing during this time deserves more attention than it has been given by current scholarship on the strike, and in many ways this period allowed the leadership to lay the foundations for future success, something that all who practice social movement unionism successfully must do.

While leaders and rank-and-file members rejected the Democratic Party and began to build further relationships with community organizations and activist movements, it was also unclear whether public support for the union could remain high enough to keep pressure on the city government. There is an inherent risk in social movement unionism's assessment that building enough community support can offset the negative effects of rejecting government and party officials. Some of these relationships were new for CTU, so it was unclear how strong they

were and how they would fare beyond this first strike. As for policy, the 2012 strike happened during a time of fiscal stress as the city was still recovering from the 2008 recession. It's clear that the union had to limit its bargaining demands and that not all of the broader, more radical demands could be met. These issues did not disappear, however, and returned to the bargaining table during the next round of contract negotiations in 2015-2016. Particularly, issues like charter schools that were discussed only on the periphery during the 2012 strike surfaced as major points of contention during the following years. CTU's strategy had to continue to evolve.

### 3. The 2015 Contract Negotiations

*When the wealthiest in our city tell us that our schools are broke, we say that our schools are broke on purpose.*

- Jesse Sharkey, CTU Vice President, 2015-2016

#### Introduction

Soon after Chicago Public Schools (CPS) and the Chicago Teachers Union (CTU) finalized their 2012-2015 labor agreement, it became clear that the teachers' fight for public schools had only just begun. During the 2012 negotiations, both sides understood that certain issues would remain unresolved. Only a few years later, these issues came to a head as the expiration date for the 2012-2015 agreement came and went, leaving thousands of teachers to work without a contract from June 30, 2015 until October 10, 2016.<sup>1</sup>

This chapter uses the same framework proposed in the Introduction to analyze CTU's strategy of social movement unionism between 2014 and 2016. Focusing on the union's capabilities in areas of leadership, relationships, and policy shows that as CTU leaders faced mounting challenges, they also successfully broadened their coalition of support for their demands. Because of the complexity and length of this time period, this analysis fits less cleanly into three distinct categories. This is one of the challenges of operationalizing a theory like social movement unionism using a case study over a longer period of time. The longer leadership remains in power, the more there is a capacity for overlap between these categories as strategies shift and relationships change. Still, this period is essential to analyze, particularly because there is a lack of scholarship covering these two years.

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<sup>1</sup> Caroline Spiezio, "CTU Contract Talks Timeline," *Chicago Reporter*, March 31, 2016, <https://www.chicagoreporter.com/ctu-contract-talks-timeline/>; Brandis Friedman, "CTU, CPS Agree to Contract, Full Cost Remains Unclear," *WTTW*, October 11, 2016, <https://news.wttw.com/2016/10/11/ctu-cps-agree-contract-full-cost-remains-unclear>.

Before diving into each of these three elements, this chapter provides important background information in order to better comprehend the myriad of overlapping pressures during this timeline. The 2014 mayoral race, impending school closings, the city's fiscal crisis, and the expansion and organization of charter schools all complicated CTU's fight for an acceptable contract in line with CORE's values during this period. This resulted in a bitter fight between the negotiating parties and mixed results for both sides. A theme emerged from each of these crises: the city was broke, and something had to give. For CTU leadership, this was not an excuse to cut funding. Instead, the financial situation served as an opportunity for city officials and Chicagoans to ponder how and where the city raises and spends funds. This meant that CTU had to broaden the conversation once again to issues beyond wages and working conditions, calling into question the validity of the neoliberal status quo.

## **Background**

On May 22, 2013, less than a year after CTU's first strike in decades, the Chicago Board of Education voted nearly unanimously to close 49 elementary schools, marking the largest school closure approval in the city's history.<sup>2</sup> CTU knew these closings were on the horizon, especially after the *Chicago Tribune* leaked a report during the strike that showed that the administration was contemplating the elimination of up to 120 schools in the city.<sup>3</sup> CTU filed multiple lawsuits to block the proposal and gathered protestors to attend every public hearing on the matter. Mayor Rahm Emanuel was "prepared to take a political hit for the closings," as he led his appointed

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<sup>2</sup> Noreen S. Ahmed-Ullah, John Chase, and Bob Sector, "CPS approves largest school closure in Chicago's history," *Chicago Tribune*, May 23, 2013, <https://www.chicagotribune.com/news/ct-xpm-2013-05-23-chi-chicago-school-closings-20130522-story.html>.

<sup>3</sup> Noreen S. Ahmed-Ullah, John Chase and Jeff Coen, "Mayor's plan to close schools fuels union fears during teachers strike," September 11, 2012, <https://www.chicagotribune.com/news/ct-xpm-2012-09-11-ct-met-teachers-strike-school-closings-20120911-story.html>.



Board of Education at each point in this process.<sup>4</sup> Emanuel's administration repeatedly cited the 100,000 "empty desks" in CPS schools, a calculation based on an assumption that every class should have 30 students.<sup>5</sup>

The city was not quiet about the reasons for this plan -- it needed money desperately and knew that there were many private charter networks willing to buy the buildings of some of these "underperforming" schools. With a deficit approaching \$1 billion, CPS was "looking at charters to take a bigger bite of the school system."<sup>6</sup> This, unsurprisingly, did not sit well with CTU leaders, who were prepared to fight these closings and the expansion of charter schools despite the city's financial troubles.

In November 2014, CTU and CPS began the next round of contract negotiations. The contract agreement would not expire until June the following year, but with the looming fiscal crisis and other important issues, it would end up taking far longer than that to come to an agreement. On top of that, Mayor Emanuel and CTU President Karen Lewis were both turning their focus to the upcoming mayoral race in February of 2015. While Lewis contemplated joining the race for mayor and received some early positive polling numbers, her health ultimately prevented her from running. Mayor Emanuel won reelection after a runoff in April 2015, and both sides settled in for a long, ugly fight. For months, the parties negotiated with little success, with CTU considering and rejecting a one-year contract proposal from CPS less than a month before their current contract expired.<sup>7</sup> As teachers began the school year without a

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<sup>4</sup> Ibid.

<sup>5</sup> Ibid.

<sup>6</sup> Noreen Ahmed-Ullah, "CPS links closing to charter deals: Private firms may get a chance to run schools set for turnaround," *Chicago Tribune*, October 11, 2012, <https://search-proquest-com.proxy.mtholyoke.edu:2443/chicagotribune/docview/1095625820/AD09F829BA6B41D8PQ/13?accountid=12605>.

<sup>7</sup> Spiezio, "CTU Contract Talks Timeline."

contract, both negotiating parties continued to propose and reject offers. CTU filed multiple unfair labor charges against CPS over salaries and negotiating tactics, moving closer to a strike each month.

In December 2015, after nearly six months of working without a contract, 88% of CTU members voted in favor of a strike-authorization vote, a measure that authorizes the union's House of Delegates to set a future strike date.<sup>8</sup> This sent a strong message to CPS, and the two parties began daily bargaining sessions. All this time, the city's financial situation only worsened. Newly elected Republican Governor Bruce Rauner began discussing a state takeover of the district and even a path to bankruptcy.<sup>9</sup> The stakes were high, and the district began doing everything possible to save money and stay afloat, even while trying to negotiate the contract. In February, CPS announced \$75 million in mid-year cuts to the school budgets and a month later the district authorized three days of furlough for all employees to save \$30 million dollars.<sup>10</sup> Already at risk without a contract, CTU members responded by voting for a one-day strike on April 1. Instead of striking until a contract agreement, this day of action represented more of a walkout, where 15,000 participants from CTU's coalition across the city came together around common demands. Because this action was not in line with SB7 and Section 4.5 of the Illinois Education Labor Relations Act, the state's laws detailing the appropriate pathway and reasons for striking, the Illinois Education Labor Relations Board prevented CTU from any future strikes until a proper fact-finder report could be properly released -- a process that takes months. Negotiations continued for months, with discussions of a formal strike always present but

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<sup>8</sup> CTU Communications, "FAQ on this week's Strike Authorization Vote," *Chicago Teachers Union*, December 7, 2015, <https://www.ctulocal1.org/posts/faq-on-this-weeks-strike-authorization-vote/>.

<sup>9</sup> "Rauner: State Takeover of CPS 'Very Likely,'" *CBS Chicago*, February 19, 2016, <https://chicago.cbslocal.com/2016/02/19/rauner-state-takeover-of-cps-very-likely/>.

<sup>10</sup> "CPS orders three furlough days for all staff," *ABC 7 Chicago*, March 3, 2019, <https://abc7chicago.com/education/cps-orders-three-furlough-days-for-all-staff/1229876/>.

without the ability to truly threaten a strike until the fact-finder's report was released. This hurt CTU's bargaining power and may have dragged negotiations on for additional months, since CTU's practice of social movement unionism meant they refused to accept mediocre contracts.

After over a year without a contract, CTU and CPS finally came to an agreement on October 11, 2016. This contract would last until 2019. While these contract negotiations dragged on, union members had been busy with another important endeavor: unionizing charter school teachers. This strategic decision marked a departure from the union's past but will serve as important context for each part of this complex timeline of negotiations. This timeline offers ample opportunity for analysis, particularly within the framework of leadership, relationships, and policy, as CTU continued to expand and refine its practice of social movement unionism. In particular, this period showed the capacity for a successfully mobilized union to solidify its coalition of support across other unions, community organizations, and movements. This indicates the potential for unions to achieve political capital even during financially strained periods through long-term coalition building and an emphasis on relationships.

## **Leadership**

CTU's leadership remembers this round of contract negotiations quite differently than the rank-and-file does. For CORE leadership, this period represented a necessary and radical form of organizing that continued building a citywide coalition dedicated to fighting neoliberalism. For many rank-and-file members, this period is a bit unremarkable. Still, both the formal union leadership and the grassroots rank-and-file membership played important roles during this period. For union leaders, this presented an important opportunity to engage with electoral politics, as President Lewis considered a mayoral run and received promising early success. This

raises questions about the possibility of union leadership practicing social movement unionism to engage with electoral politics and even end up on the other side of the negotiating table. While health circumstances prevented Lewis from achieving this, this possibility deserves further study in other unions.

As in the previous chapter, this section analyzes the extent to which union leadership -- both the actions of formal leadership and reactions of grassroots members -- successfully practiced social movement unionism. A successful practice of social movement unionism is a formal leadership that is accountable to a mobilized rank-and-file. Leaders remain connected to their membership and teachers have opportunities for engagement. This section finds that without a strike, it can be more difficult to mobilize the rank-and-file within a union, even if those in leadership positions are remaining militant in their tactics.

### *Union Leadership*

By the end of the 2012 strike, CTU President Karen Lewis had become a household name for many Chicagoans. Even if someone only marginally followed the negotiations, Lewis was on the nightly news regularly and had even earned some national profiles. The Caucus of Rank-and-File Educators (CORE), the leadership caucus Lewis co-founded, only had a few years of experience in leadership and the experience of one contract negotiation cycle. Still, CORE members felt that they had started a movement that could expand into every sector of the city, even the government. Could social movement unionism find further policy success if the grassroots leadership became elected to office? It would certainly represent immense political capital for the issues and players involved in social movement unionism.

The 2012 strike had solidified an antagonistic dynamic between CORE leadership and Mayor Emanuel's administration. The union's departure from appealing Democratic Party leadership would have long-lasting implications. Social movement unionism hinges on the idea that rejecting neoliberal interests, including those in power and those in the Democratic Party, is successful when a broad enough coalition of supporters can create a movement to pressure decision makers. With Lewis as the face of CTU, that strategy had worked to an extent in 2012, though there was certainly still room to build the coalition of support. A few years later, in 2014, that strategy presented an opportunity. In August, Lewis began exploring a mayoral run. CTU members wanted Emanuel out of office, and they were about ready to support any progressive candidate who would be a departure from his neoliberal policies. Many Chicagoans agreed, with a poll at the time showing that only one out of five Chicago voters thought Emanuel was doing a better job than his predecessor and only 29% of voters saying they would vote for him in a hypothetical match-up.<sup>11</sup>

Opposing interests took Lewis's exploratory committee seriously, revealing her capacity to actually threaten the mayor's electoral chances. A few weeks after announcing her exploration, Democrats for Education Reform, a pro-charter school organization, began a public opinion campaign against Lewis to weaken either her candidacy or her power at the negotiating table. The organization put out press statements attempting to paint Lewis's role as president of CTU as a conflict of interest even as she only considered campaigning.<sup>12</sup> "Chicagoans won't

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<sup>11</sup> "Karen Lewis: Bozo the Clown Could Beat Emanuel in Mayor's Race," *NBC 5 Chicago*, May 12, 2014, <https://www.nbcchicago.com/news/local/karen-lewis-rahm-emanuel-bozo-mayor-election-chicago-teachers-union/1978232/>.

<sup>12</sup> "Release: DFER-IL Calls On CTU President Karen Lewis To Choose Between Mayoral Candidate or Lead Negotiator in New Teacher Contract," *Democrats for Education Reform*, September 16, 2014, <https://dfer.org/press/dfer-il-calls-on-ctu-president-karen-lewis-to-choose-between-mayoral-candidate-or-lead-negotiator-in-new-teacher-contract/>.

know whether President Lewis is representing her members, her political interests, or if she's using the negotiations merely as an extension of her campaign," the organization's state director stated.<sup>13</sup>

The fact that the president of the Chicago Teachers Union could harness such political attention and threaten the comfortable incumbency advantage in Chicago politics represented an important tenet of social movement unionism. The activists who founded CORE only a few years earlier were still very much connected to the grassroots base who had elected them. Lewis's passion and capacity to connect with Chicagoans during the 2012 strike not only translated into political capital for contract negotiations, but it also made her a household name. People knew her as a fighter and a teacher, not as someone with decades of political experience. Social movement unionism requires leadership that inspires broad coalitions of activists and members, and Lewis's poll numbers showed that she had done just that by rejecting the political establishment and speaking directly to the city's most dire issues.<sup>14</sup>

Unfortunately for CTU and its supporters, Lewis's mayoral prospects did not last very long. Only two months later, in October 2014, her exploratory committee announced that she would not be pursuing the office, but she "charges us to continue fighting for strong neighborhood schools, safe communities, and good jobs for everyone." Shortly thereafter, it was revealed that Lewis had been diagnosed with a cancerous brain tumor, requiring emergency surgery and beginning a long-term battle for her health.<sup>15</sup> The requirement for bold, grassroots leadership for successful social movement unionism meant that CORE members faced a possible

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<sup>13</sup> Ibid.

<sup>14</sup> "Poll: Mayoral race between Emanuel, Lewis would be close," *ABC 7 Chicago*, August 14, 2014, <https://abc7chicago.com/politics/poll-mayoral-race-between-emanuel-lewis-would-be-close/259054/>

<sup>15</sup> Mary Ann Ahern, "Karen Lewis Has Brain Tumor: Source," *NBC 5 Chicago*, October 13, 2014, <https://www.nbcchicago.com/news/local/karen-lewis-has-brain-tumor-source/55423/>.

future crisis since Lewis represented the shift to social movement unionism so clearly. Lewis remained as president of the union for four years after her diagnosis, postponing that crisis and allowing for CORE's other leaders, especially Vice President Jesse Sharkey to informally begin taking on some of her responsibilities.

In the end, CTU endorsed Cook County Commissioner Jesus "Chuy" Garcia for mayor, following Lewis's personal endorsement of the Chicago activist. Vice President Sharkey said of the endorsement, "Working families are tired of being ignored by politicians in Chicago who only care about downtown.... Our union's delegates have spoken, and our rank-and-file teachers, paraprofessionals and school clinicians agreed that because of Chuy's three decades of consistent leadership and because he has a significant grassroots base, he is the best candidate to mount a successful campaign against the mayor."<sup>16</sup> Even as their own candidate could not continue her race, the union emphasized the rank-and-file support for Garcia, showing continued accountability to the membership that elected current leadership.<sup>17</sup> In the end, Emanuel won the reelection despite the union's efforts to stop him, meaning this round of contract negotiations would once again be between the Emanuel administration and Lewis' CTU leadership.

During the actual negotiation period, CTU leadership continued to practice social movement unionism through their framing strategies, portraying this fight as a continuation of the crusade against neoliberalism that began in 2012. That strike had shown CORE's strength and capacity to threaten the city's political status quo. The victories from that strike only

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<sup>16</sup> CTU Communications, "CTU House of Delegates Endorses Jesus 'Chuy' Garcia for Mayor of Chicago," November 6, 2014, <https://www.ctulocal1.org/posts/ctu-house-of-delegates-endorses-jesus-chuy-garcia-for-mayor-of-chicago/>.

<sup>17</sup> This backing does not necessarily mark a significant departure from the union's past, though, because previous leadership declined to endorse former Mayor Richard Daley in his 2007 bid for a sixth term. The 2007 endorsement was still in line with previous union practices, however, because it was motivated by the union jobs lost from the mayor's Renaissance 2010 program, not because of his commitment to neoliberal interests and policies.

emboldened CTU leadership to continue their fight. Jackson Potter, a co-founder of CORE and a member of its leadership team during this time, described the difference between the two strikes:

We were a new leadership [in 2012], so definitely not as confident or assured that we could win this fight and certainly our members weren't either. So, it was just a powder keg in a maelstrom of challenges and pressure and tension and anxiety, and I think when you get to 2016, you had some of those characteristics but they weren't nearly as seemingly insurmountable. We had the confidence that we can organize, lead, and win strikes.... And so, that was kind of an easier fight to win on some levels. [The new CPS CEO, Forrest Claypool,] was more ideologically interested in divesting from public services and special education than Rahm was, so in that way he was a bigger threat to our preservation of the public system, but he just wasn't going to be able to pull it off.... The media was much more interested in what we had to say, so our political power, as Rahm's diminished, had grown simultaneously. We're starting to elect our own people into office, in many cases for the first time ever at all levels of government, the county, the city council and the state legislature. And then we are able to organize the biggest charter school in the state, so that all put the AstroTurf groups in decline and in a more defensive posture and they started even pulling resources out of Illinois so that gave us more space to maneuver. And we just had a bigger field of alliances... So, if you look at the media from that day, it feels like a general strike the way it was covered.<sup>18</sup>

Potter, as a member of CORE leadership, paints an extremely favorable picture of this period, describing in detail the ways in which CTU had strengthened its relationships across the city since 2012 and the ways in which the entire political landscape shifted to favor their more militant demands. In many ways, Potter's description holds true. The organization of charter schools, the establishment of media connections after so many reporters covered the 2012 strike in detail, and the broad coalition of Chicagoans who took to the streets on April 1st in solidarity with CTU shows that there were many ways in which this period represented growth for CTU's power.

The next subsection, however, will show that this portrayal of a grassroots-focused, energizing movement culminating in a one-day strike is not how many rank-and-file teachers remember this time period. Still, it is important to recognize the real work done by CORE

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<sup>18</sup> Jackson Potter (CORE Co-Founder), in conversation with the author, November 2020.



leadership during this bargaining period that remained focused on their original anti-neoliberalism platform. The disconnect between Potter's depiction of the time period and that of most rank-and-file teachers, however, represents a barrier for social movement unionism. Without the clear timeline and required militancy of a traditional strike, it can be difficult for even the most motivated leadership to keep their base mobilized.

The tactics during these negotiations continued to be more militant and radical than those of previous leadership, following the principles of social movement unionism even without a formally declared strike. In fact, CTU leadership chose one of the most radical options as contract negotiations soured: authorizing a blatantly illegal strike. From the beginning, instead of bowing to the pressures of the district and the Emanuel administration during a historic statewide fiscal crisis, leadership at the bargaining table refused to accept any major losses for their members or their communities. Even back in 2014, Lewis stated that the union would not agree to offers to extend the existing contract because of challenges with evaluation and a lack of resources.<sup>19</sup> That meant taking a chance and accepting the possibility of working without a contract or even ending up with a contract worse than the 2012 one. But for CORE leadership, that risk was worth it because they were willing to do anything to get more resources for their schools.

The decision to authorize and organize a citywide one-day strike on April 1, 2016, was a response to a plan by CPS' CEO, Forrest Claypool, to cut teacher pay by almost 7% and because the district had stopped paying certain "step and ladder" pay raises that were present in the previous contract.<sup>20</sup> While the motivation for this action was one based on pay-related issues

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<sup>19</sup> Rebecca Harris and Sarah Karp, "Lewis: CTU won't renew contract for fourth year," February 18, 2014, <https://www.chicagoreporter.com/lewis-ctu-wont-renew-contract-fourth-year/>.

<sup>20</sup> Sarah Karp and Becky Vevea, "Chicago Teachers Stage Rare 1-day Strike," April 1, 2016, <https://www.wbez.org/stories/chicago-teachers-stage-rare-1-day-strike/a42830fb-7005-4152-832c-077c103cc1f9>.

instead of broader policy demands, this decision is certainly not a return to business unionism. Even for the most ideal practice of social movement unionism, wages and working conditions will continue to be an essential part of union activity, and the militant response and framing of such a threat brings the issue into a broader conversation about funding and the reason the city faced such a fiscal crisis. The one-day strike openly defied the 90-day, multi-step process for striking outlined in the 2010 SB7/Section 4.5 law. CPS immediately responded by calling the strike illegal, with Claypool saying, “We needed more time to exercise the legal process to truly get an injunction and the leader of the CTU announced on television this week that her members would not honor a court-ordered injunction anyway from a judge, which again just, I think, sort of magnifies the lawlessness of this action.”<sup>21</sup> Still, union leaders were able to frame the strike as a “citywide movement representing a range of groups impacted by the lack of a state budget -- from teachers and college professors to juveniles in detention centers and child care workers. The union is calling for sustainable revenue sources for public services,” said the *Chicago Reporter*.<sup>22</sup> This tied closely to CORE leadership’s framing during this period of a district that was “broke on purpose.”<sup>23</sup> Saying there was not enough money for the resources CTU demanded was an unacceptable answer for leadership; if the city was broke, there needed to be a critical examination into the neoliberal tax cuts and corporate loopholes that led to that situation.

The rejection of state law and this injunction by CORE leadership was certainly a risk, but it appeared to pay off even if rank-and-file members were not as invested in the day-to-day details of the negotiations. In 2016, CTU cancelled its internal leadership elections for the first time in at least two decades after no opposition candidate from any caucus came forward to run

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<sup>21</sup> Ibid.

<sup>22</sup> “CTU ends one-day strike with downtown rally,” *Catalyst Chicago*, April 1, 2016, <https://www.chicagoreporter.com/liveblog-april-1-ctu-strike/>.

<sup>23</sup> Jackson Potter, in conversation with the author, November 2020.

against Lewis and CORE. One CORE member told the *Chicago Reporter*, “They see we’re a fighting union. If you look around the country, there’s a lot of unions that are collaborationists. They collaborate with the boss instead of fighting back for what members deserve.”<sup>24</sup> This level of support (or at least lack of opposition) shows that CORE leadership during this period was able to successfully remain accountable to its members while pushing the union in a more militant direction, continuing its practice of social movement unionism for the most part, even during a fiscal crisis and legal challenges to its actions.

### *Rank-and-File Membership*

The extent to which the rank-and-file embraced and practiced social movement unionism during this period is mixed. For one, members were stepping into new leadership roles thanks to the opportunities that CORE leaders provided during their mobilization in 2012. In fact, the CTU House of Delegates voted to endorse three of their own rank-and-file teachers for aldermen, a position typically inaccessible for average citizens due to the extreme incumbency advantage from the remnants of the Democratic machine in Chicago.<sup>25</sup> Some teachers, with the experience and skills gained from the first four years of CORE leadership, decided to challenge that. Tim Meegan, a social studies teacher who only became heavily involved in activism and union organizing after CORE’s election, decided to run against Deb Mell, the incumbent who had been appointed to her father’s role after his death.<sup>26</sup> Meegan did not win the election, earning 34% of

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<sup>24</sup> Melissa Sanchez, “With no opposition, CTU cancels election and gives Lewis an automatic third term,” April 7, 2016, <https://www.chicagoreporter.com/with-no-opposition-ctu-cancels-election-and-gives-lewis-an-automatic-third-term/>.

<sup>25</sup> Jessica Trounstein, *Political Monopolies in American Cities: The Rise and Fall of Bosses and Reformers* (Chicago, IL: University of Chicago Press, 2009).

<sup>26</sup> Yana Kunichoff, “Meet the High School Social Studies Teacher Taking On Chicago’s Right-Wing Democrats,” October 27, 2014, <https://inthesetimes.com/article/meet-the-social-studies-teacher-taking-on-chicagos-right-wing-democrats>.

the vote to Mell's 50.2%,<sup>27</sup> but the transition from teacher to activist and candidate after CORE's election shows the resulting mobilization from the leadership's practice of social movement unionism within the union. During the election, he said, "The Democrats are moving more and more toward corporate interests -- they're no longer really representing working people. Rahm Emanuel is a textbook example of that."<sup>28</sup> While Meegan may have arrived at this conclusion on his own, this word choice follows the rhetoric of CTU leaders in the 2012 strike. These conversations about neoliberalism, inequities, and corporate interests followed teachers from the streets back into their own homes and classrooms, changing the way they viewed city politics as a whole, a success in the practice of social movement unionism.

One CTU member, Susan Sadlowski Garza, actually won her race for Alderman. Starting her career as a lunch lady and working up to a CPS counselor and CTU area vice president, she became the first active CTU member to be elected to City Council.<sup>29</sup> Her story is another example of how CORE's commitment to its rank-and-file membership reshaped the way many CTU members viewed the city and politics as a whole. While she did play a leadership role in coordinating the 2012 teacher strike, she was not a co-founder of CORE. President Lewis herself urged Garza to run for the office.<sup>30</sup> The union's financial and logistical support throughout her campaign allowed her to do the impossible: defeat a four-term incumbent with mayoral connections and corporate funding. She now serves on the Chicago City Council Progressive Reform Caucus.<sup>31</sup> Michelle Gunderson, CTU member and functional VP for elementary schools

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<sup>27</sup> "Tim Meegan," *Ballotpedia*, accessed April 25, 2021, [https://ballotpedia.org/Tim\\_Meegan](https://ballotpedia.org/Tim_Meegan).

<sup>28</sup> Kunichoff, "Meet the High School Social Studies Teacher."

<sup>29</sup> "The Alderwoman," *Alderwoman Susan Sadlowski Garza*, accessed April 25, 2021, <https://www.aldsrg.com/the-alderwoman>.

<sup>30</sup> Ben Joravsky, "The new Ed Vrdolyak is nothing like the old one," *Chicago Reader*, June 20, 2016, <https://www.chicagoreader.com/chicago/sue-sadlowski-garza-vrdolyak-tenth-ward-profile/Content?oid=22902568>.

<sup>31</sup> "Progressive Caucus Members," *Chicago City Council Progressive Caucus*, accessed April 25, 2021, <http://chicagoprogressivecaucus.com/who-we-are/>.

at the time, sums up the effect of this organizing on CTU members by saying, “I believe that [the election] was an organizing tool. It made us stronger. It made us, as teachers, more politically aware. Teachers, a working class, are not the most political people. Yet, in our work, we do the most political job in teaching people how to read and form opinions. So, activating our membership on a political basis was very important for us moving forward.”<sup>32</sup>

Aside from the teachers and members who ran for political office, most rank-and-file teachers supported the leadership’s decision making throughout the contract negotiations, even if there remains a collective gap in memory for many members. Whenever members had the opportunity to vote on actions, they were generally very supportive of the leadership’s plans. In November 2015, only a few months after their contract expired, 97% of members who voted said they would authorize a strike if needed. This “mock strike vote” was more of a warning signal to the state legislature and city government than an actual call to action, but it still showed that rank-and-file sentiment was very much in line with the union’s side of the negotiations.<sup>33</sup> Almost a year later and after the one-day April “strike,” in October 2016, CTU held a strike authorization vote with 90% turnout where almost 96% of those voting approved of striking.<sup>34</sup> Once again, this resounding support by the rank-and-file members pushed the city into action, as the Emanuel administration could not afford a third work stoppage since taking office. Clearly, union membership felt activated by their leaders and motivated by the issues on the bargaining table.

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<sup>32</sup> Labor Beat, “CTU Rally for Fair Contract,” YouTube Video, 26:42, July 3, 2015, <https://www.youtube.com/watch?v=qW0-eVQd6vk>.

<sup>33</sup> “97 percent of Chicago teachers approve strike in test vote,” *ABC 7 Chicago*, November 9, 2015, <https://abc7chicago.com/education/97-percent-of-chicago-teachers-approve-strike-in-test-vote/1076344/>.

<sup>34</sup> “Teachers vote 95 percent to authorize strike to resolve contract dispute,” *Chicago Teachers Union*, September 26, 2016, <https://www.ctulocal1.org/posts/teachers-vote-95-percent-to-authorize-strike-to-resolve-contract-dispute/>.

Still, being in line with leadership is not the same as being actively mobilized. Despite the clear support at the time, many CTU teachers now look back at this period as unimportant or forgettable, perhaps because the nature of these years required more of union leadership than of rank-and-file members. This does not necessarily mean that CTU failed to practice social movement unionism during this period, but it does mean that union leadership did less to engage its own members than during the 2012 strike. Tonya Harbottle, a rank-and-file CTU member and teacher, describes the period by saying,

The day of action didn't feel like a strike to me, even though technically, or legally it probably was. But I feel like a strike is when we are in the middle of negotiating and we don't know when it will end, right? Like, it will end when we have a mutually agreed upon contract. We knew that this was just one day, so it felt very different to me. And I think for that reason, it felt not that it wasn't important, but it feels less memorable to me. But I can't say that it wasn't important, I just don't recall it specifically.<sup>35</sup>

This emphasis on the unmemorable feeling of this time may mean that it is necessary to have real, full strikes in order to fully engage all rank-and-file members during contract negotiations, a key tenet of social movement unionism. This, of course, is not a sustainable or realistic solution for unions, which could pose a problem for the stamina of social movement unionism. Rank-and-file teachers were mostly supportive of these actions, but without being in the streets and closing down schools, it was difficult to keep tens of thousands of members engaged enough to create a collective memory around the issues of a time period. Is collective memory necessary to practice social movement unionism? It remains to be seen, but one thing is clear: many teachers simply do not remember many specifics about union activism for these two years.

Another teacher who actually became a union delegate for her school, Sherry Nelson, describes the period by saying:

I think that [negotiation] sort of exists like a blip in terms of our collective memory. I do think it reinforced for us that CPS is still out to get us. They don't ever want to do right

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<sup>35</sup> Tonya Harbottle (CTU rank-and-file member), in conversation with the author, November 2020.

by us. And just having to drag on, that felt more like stopping some attacks and not necessarily a lot of gains. The one-day strike, I'm not sure that was successful. I mean we did it, so in that sense there was solidarity, but I don't think it was necessarily thought through all that well or planned, but it also didn't hurt that badly either. It's hard to tell. But, you know, it was in the strike, and there wasn't a lot of strong messaging up to that point. It wasn't a campaign. People did it, so that's good. People didn't break it, but I'm not sure how effective it was.<sup>36</sup>

Here, even a school's union delegate who attended leadership meetings and facilitated all union activity for her school did not find the strike as successful or memorable. The idea that CPS was "out to get" teachers and that their reasons to defend themselves shows some understanding for the reasoning behind union action, but the lack of a clear, consistent campaign to motivate teachers around this period may have stalled some of the momentum created in 2012, though clearly not enough to keep teachers from authorizing strikes or continuing to support CORE leadership.

For some teachers, this period was simply a continued indictment of Rahm Emanuel and his administration. Laura Ferdinandt, a rank-and-file teacher, said:

It was alarming and also kind of not alarming that we had no contract for so long because it's like, "Oh yeah, it's CPS. They can't get anything solved." And at that point it very much felt like an indictment on Rahm Emanuel, and it felt like a fight between the CTU leadership and the city and we were just kind of the sacrificial lambs. What are we trying to accomplish? If it's just "screw Rahm," then fine, but then be honest about that.... The more that I've gotten to understand CPS and CTU, [though, it's clear that] they take very seriously their responsibility for the greater educational community and CTU is not afraid to be the first one out of the gate.... So, I think in retrospect 2015 was about Rahm but it was also about setting the stage for Oklahoma and all these other schools in all these other places that are fighting against Right to Work, which is a beast that is so ugly that they needed some ammunition.<sup>37</sup>

The lack of leadership clarity and communication is clear throughout these interviews with rank-and-file teachers, pointing to at least a downfall, if not a failure, of CTU leadership at the time to

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<sup>36</sup> Sherry Nelson (CTU rank-and-file member), in conversation with the author, November 2020.

<sup>37</sup> Laura Ferdinandt (CTU rank-and-file member), in conversation with the author, October 2020.

commit just as much efforts to organizing their own membership as they did to organizing charter schools and activists across the rest of the city, as the next section discusses. It also raises the question of the necessity for traditional strikes in order to keep rank-and-file members engaged. Still, this was not a total failure for leadership in their practice of social movement unionism, as most teachers could still see the importance of taking action and there was not much active resistance to CORE strategies.

### **Relationships**

As described in the previous section, the divisive relationship established in 2012 between CPS and the Emanuel administration, on the one hand, and CTU leadership on the other had only grown more hostile. This continued the union's strategy of rejecting the Democratic Party and other people in power. At the same time, CTU leadership was investing great efforts into strengthening their relationships with community organizations and with charter school teachers, solidifying their power as one of numbers and not one of elite connections. Successful social movement unionism requires a broad coalition of activists and community organizations in order to garner enough political capital to leverage against power holders. This is coupled with a rejection of neoliberal power holders, something CTU was very clear in doing during the 2012 strike. During this negotiating period, CTU prioritized solidifying and expanding its coalition of support, which granted it adequate political power to continue demanding broader policy changes.



*Power Holders*

Instead of just the verbal attacks and sharp rhetoric present throughout the 2012 strike, this bargaining period was marked with actual legal challenges by both sides of the negotiating table. Months before the contract expired, in May 2015, CTU accused the Chicago Board of Education of bargaining in bad faith, filing an unfair labor practice complaint against CPS with the Illinois Educational Labor Relations Board.<sup>38</sup> CPS officials repeated that their \$1.1 billion budget deficit did not allow for flexibility and called for teachers to join with city officials in lobbying for more state money, particularly for pensions. The union responded by claiming that CPS had refused at least three formal requests for mediation over the last months.<sup>39</sup> Formal mediation and fact-finding must take place before any strike authorizations according to state law, and it is possible the district's avoidance of mediation could have been part of an effort to avoid a strike. The back-and-forth over legal processes certainly furthered the antagonistic relationship between CTU and CPS, but some of these tactics were more effective than others. While fighting over the nuanced legal process was necessary in many ways, it did not necessarily rally rank-and-file members in the same way that sharp policy attacks against Mayor Emanuel did in 2012. These attacks continued to an extent, of course, but CTU leadership had other necessary issues to address that brought scrutiny to CPS directly and created an indictment of the entire decision-making body, from the mayor's office to every corner of the district administration.

The next major challenge for union leadership would be to clearly identify a pattern of failed decision making on the other side of the bargaining table, creating a narrative of unethical behavior by power holders that would motivate rank-and-file members and community activists

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<sup>38</sup> Melissa Sanchez, "CTU files unfair labor practice complaint, seeks mediation," *Chicago Reporter*, May 7, 2015, <https://www.chicagoreporter.com/ctu-files-unfair-labor-practice-complaint-seeks-mediation/>.

<sup>39</sup> *Ibid.*

with the same rigor as 2012 despite the more bureaucratic and slow negotiating process. CTU's vice president at the time, Jesse Sharkey, played a key role in shifting that narrative, especially after CPS CEO Barbara Byrd-Bennett came under a federal corruption investigation over a \$20 million CPS contract with SUPES Academy, a training company and former employer of Byrd-Bennett.<sup>40</sup> In a press conference after the news broke, Sharkey used the scandal to indict CPS as a whole, saying,

What we do know is that there's been a real concern over the last several years in which we've seen a pattern in which top district officials have private interests which seem to conflict with their public roles as district officials... There is a culture of conflicts of interest that is extremely destabilizing and hurts the public's trust. In addition to that, if Barbara Byrd-Bennett does go... we're looking at a situation in which we'll have the fifth new CEO in four years, and that's a level of instability that frankly is damaging. It has to be laid at the feet of this corporate culture that's come into our schools in which well-connected businessmen and women make deals between what was formerly their private business enterprise and the Board of Education.<sup>41</sup>

Sharkey effectively brings the principles of social movement unionism into his statement here, calling out private, corporate interests and connecting them to a broader pattern of neoliberal attacks against public schools and public resources. Painting the entire district as corrupted by corporate interests built on the prior strike's rhetoric condemning Mayor Emanuel's policy proposals as unacceptable for the interests of public schools. This connection further solidified the distance between the two sides of the negotiating table and also showed that this fight was not just about personal grievances against Emanuel, like some may have thought, but truly an indictment of the broader political system.

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<sup>40</sup> Brandis Friedman, "Board of Education Suspends Contract with SUPES Academy," *WTTW News*, April 22, 2015, <https://news.wttw.com/2015/04/22/board-education-suspends-contract-supes-academy>.

<sup>41</sup> Chicago Teachers Union, "CTU VP Jesse Sharkey on federal investigation into Chicago Public Schools," YouTube Video, 8:42, April 16, 2015, <https://www.youtube.com/watch?v=oCleYJ497E>.

As negotiations continued to break down, union leadership repeatedly emphasized that the city was “broke on purpose,” with the city’s most powerful leaders creating this fiscal crisis in order to implement regressive taxes instead of holding corporate interests accountable for not paying their fair share.<sup>42</sup> The union at this point had openly opposed the mayor’s reelection campaign, recruited and organized candidates for Alderman that would oppose his agenda, and connected CPS budget shortfalls to a broader corporate scheme in the city. If there was any doubt that the rejection of the mainstream Democratic Party and corporate interests by CTU leaders would last beyond the first contract cycle, it was now clear that these relationships would be antagonistic for the foreseeable future. This is only one half of what successful social movement unionism looks like when analyzing relationships, however. It is also necessary to build a coalition of grassroots support broad enough to replace the political capital lost by rejecting those powerful and corporate relationships.

### *Coalition Building*

If rank-and-file educators were not as engaged by CTU leadership during this time, it may be because CTU spent so much of its time and resources during this negotiating period building and solidifying its relationships with grassroots organizations, parents, activists, and even charter school teachers. This subsection will first look at the process to organize charter schools and then analyze how CTU’s relationships with community organizations made its one-day strike impactful.

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<sup>42</sup> Chicago Teachers Union, “CTU leaders announce next steps in 2015 contract fight,” May 7, 2015, YouTube Video, 9:50, <https://www.youtube.com/watch?v=tMh-u08HoNY>.

## Charter Schools

One of the biggest issues during the 2012 strike was the expansion of charter schools across the city, especially those that took the place of public, neighborhood schools. School closings were an unavoidable context for this round of contract negotiations, and previous efforts to assist charter school teachers in organizing their own unions were understandably conflicting for union members. Some of these efforts began before CORE took power, but the leadership continued this organizing effort in a way that coexisted with their own values and aspirations. CTU wanted to slow the expansion of charter schools and end the constant public investment in private enterprises. Many rank-and-file teachers had reservations about this organizing, especially now that CORE leadership had effectively made the case for the halting of charter school expansion and over 50 public schools had closed since the 2012 strike, often to be replaced by charter schools.

These charter schools affected not only the job security of teachers, but they made it more difficult for public schools to survive, according to many rank-and-file teachers. CTU teachers critiqued the funding, recruitment, hiring practices, and enrollment practices of these schools. This threatened to turn into a self-perpetuating cycle where public school teachers are unable to meet increasingly high expectations because charter schools leave them with fewer resources, fewer high-performing students, and fewer opportunities for long-term community investment. Laura Ferdinandt, a rank-and-file CTU member, says of the system:

What's been happening over the last seven or eight years is that the charter schools literally skim from the top of our list, so they'll take our top performing kids out of our school, so that every year we have fewer and fewer kids returning to our school because their parents want a better opportunity for them, which I totally get! But then it makes it more difficult for us to fight to *be* that better opportunity, because it's really hard to be an outstanding or a superstar school when all of your highest performing students go to the charter school down the street. And so, I think what people don't necessarily realize is then, charter schools get these wonderful accolades and it's like, "Oh, 97% of their high

school seniors go to college!” But how many students did you kick out before senior year so you could fudge those numbers, and what was your pool of candidates to begin with? We would have 97% also if we could manipulate the rules that way! But we can’t! And we shouldn’t have to. And so I think charter schools make the equity problem even more layered than it already is, because you don’t want to tell a family, “I know you’ve been going to a charter for five years but now you have to go back to your neighborhood school that you purposefully left,” that’s not gonna fly, but until you start to do that, until families start to stay where they are, the problem is never going to be solved. I don’t see charter schools going anywhere and I don’t see them making a huge difference either. And I think people who think that charter schools are a good idea are out of touch. We wouldn’t need charter schools if every school had what it needed! Because then, you could just go to the school down your street.<sup>43</sup>

John Boggs, a union delegate and high school English teacher, echoed those sentiments and explained the clear connection between charter schools and public school funding. He said,

You know, I have 157 students right now. Come January, I’m going to have an increase of maybe like 8 to 10 kids that got kicked out of charter schools and you know, we take those kids no matter what state they’re in and what they have or haven’t done, and it’s frustrating for me because I feel like charter schools are not held to the same standard that we are. I mean, we’re held to such a high standard for data.... I’ve been teaching now for 21 years and when I first started teaching it wasn’t like this where you can just go to a dashboard and see where [your school] ranks on all these different things. And then you get emails, “we gotta get this up! We gotta do this! We gotta get our scores better for this!” and it just creates a downhill anxiety moment for everybody... and it’s not a good way for learning to happen. I think that charter schools have helped fuel that situation because they’ve taken resources that are needed in the public schools and the neighborhood schools like mine because we are given our resources based on how many kids come to our school [on the 20th day].<sup>44</sup>

It is clear that charter schools represent a sensitive subject for public school teachers, who see the negative effects of this expansion within their own classrooms each year. Additionally, multiple teachers spoke about the lack of qualified teachers in charter networks, which often rely heavily on programs like Teach for America. These programs put young people with little to no classroom experience and only six weeks of training in front of their own classroom. Often, these are young people who are not invested in a long-term career in education or who find themselves

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<sup>43</sup> Laura Ferdinandt, in conversation with the author, October 2020.

<sup>44</sup> John Boggs (CTU delegate), in conversation with the author, November 2020.

burnt out quickly from the lack of support, which leaves charter schools with little institutional memory or older teachers who can act as mentors and ensure best practices.<sup>45</sup>

This does not mean that charter schools never do good for a community or that the students who attend these institutions should be vilified, but the resentment of these schools by many rank-and-file members would make organizing charter school teachers into a union a risky, if not impossible task. Jackson Potter, a co-founder of CORE and a member of the original committee doing personal outreach to non-union charter school teachers, described the strategy as a disconnected one, particularly under the previous leadership. It was a challenge, according to Potter, to find a way to organize these teachers that was in line with CORE's principles and also appealing to the rest of the union membership. The connection came down to the financial bottom line of charter schools. Potter describes this, saying, "We're against the charter industry and we're against their expansion, and the only way you're going to stop that runaway train of privatization is you organize them, and it then drives up the incentive and it drives up their money."<sup>46</sup> As teachers at charter schools signed union cards and created or joined their own unions, the cost of running a charter school increased. Schools were required to pay higher wages, improve working conditions, and meet the other labor demands instead of focusing all profits on expanding to new areas of the city. Potter claims this happened with the United Neighborhood Organization (UNO) charter school network, where new high schools were proposed for the city's Southwest side, only to be postponed and eventually cancelled.<sup>47</sup>

As more and more charter schools became unionized, CTU leadership began advocating to allow these charter school teachers to fully join CTU. The full integration of over 1,000

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<sup>45</sup> Laura Ferdinandt, in conversation with the author, October 2020.

<sup>46</sup> Jackson Potter (CORE co-founder), in conversation with the author, November 2020.

<sup>47</sup> Ibid.

educators at 32 charter schools would not happen until 2017, but the vast majority of this organizing took place during the 2015-2016 contract negotiation period for CTU. Despite CTU's consistent messaging to stop the expansion of charter schools, CTU rank-and-file members were more than willing to unite with charter school teachers. Over 80% of union members supported the merger and leaders within the charter union, ChiACTS, described a similar goal to that of CORE leaders.<sup>48</sup> ChiACTS president Chris Baehrend told a local newspaper at the time, "charter proliferation does not help the charter schools that already exist. It actually spreads the pot of money more thinly. We've been seeing the nasty effects of it lately. This year, we've had budget cuts, layoffs, and enrollment decline in the majority of the schools we represent.... The answer to every crisis labor has ever faced has been more solidarity and more collective action."<sup>49</sup>

Without this context and coherent strategy, it would be difficult to describe the organizing and merger of charter school teachers with CTU as a win for social movement unionism's capacity to defeat neoliberal policies, especially since charter schools represent so much of the new neoliberal norm for CORE and progressive teachers. Still, CORE leadership was able to successfully sell this merger as a way to fight neoliberalism and quell the expansion of charter schools, echoing Baehrend's call for collective action and solidarity. A YouTube video created by CTU in order to support the potential merger describes the benefits of unity, claiming that charter teachers and public school teachers are fighting the same battles. In between video clips of teachers marching together and pictures villainizing Mayor Rahm Emanuel as an enemy of public schools along with President Donald Trump and the current governor Bruce Rauner, Martha Baumgarten, a teacher at Carlos Fuentes Charter School, explains why she sees the

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<sup>48</sup> Jeff Schuhrke, "Charter School Educators Just Voted to Join the Most Militant Teachers' Union in the Country," *In These Times*, June 12, 2017, <https://inthesetimes.com/article/chicago-teachers-union-charter-schools-union>.

<sup>49</sup> Ibid.

merger as beneficial for all teachers. She says, “CTU has been super generous in supporting our union since its inception, so I think this is a way to make that relationship... really solid which I think is really important.... I think if we all vote yes, we’re just showing the people who are against teacher voice, against unions, that we’re all super united and both of our organizations will come out way stronger in the end.”<sup>50</sup>

This solidarity did not immediately stop the expansion of charter schools or other neoliberal policies from taking place, but it did represent a shift in the coalition of activists and unions who were supporting CTU at this time. Successful social movement unionism broadens and deepens relationships with community organizers and those who are directly affected by neoliberal policies while distancing the union from powerful political actors and corporate interests. Even though it may have seemed counterintuitive, the organizing of charter schools did just that. It worked with underpaid, overworked teachers who were facing the same battles for adequate resources and expanded CTU’s coalition during this contract negotiation and beyond. With more of Chicago’s teachers united, this coalition had more strength than it did in years past, even though the tensions between charter schools and public schools would not yet be completely resolved.

### Community Relationships

Since the rise of CORE leadership, CTU’s coalition of support had grown broader, allowing it to show up in force for contract negotiations and other issues. This happened not because CTU leaders mentioned community organizations in speeches or generally supported their issues, but because CTU members joined them in the streets when they marched and developed long-term

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<sup>50</sup> Chicago Teachers Union, “The CTU-Charter Union Merger,” October 5, 2017, YouTube video, 3:07, <https://www.youtube.com/watch?v=r2TAgn4-JPE>.



relationships around issues that affected CTU teachers and the communities CPS served. When Potter describes the success of the April 1st one-day strike, he focuses almost exclusively on the alliances and organizations that joined CTU in the streets. He says,

We just had a bigger field of alliances; we were able to -- in our school closing fight -- figure out an alliance with Unite Here for the first time that had cafeteria workers in the schools in the lead up to 2016. We were able to get the private service SIEU Local 1 involved and SEIU Local 73 somewhat involved, though that was touch and go. We were able to connect with Fight for 15 and that campaign more explicitly. Through the Illinois Federation of Teachers, we were also seen as more credible because of the victory of the strike so we were able to get the university professors at both Northeastern Illinois University and Chicago State to join in with this kind of aligned set of strike activity on April 1st. So, I think we turned the city into a labor justice and racial justice carnival! And then we had established stronger alliances with Black Lives Matter affiliates and had been planning with them in the aftermath of the Laquan MacDonald murder, and so those were kind of strengthening relationships as well, although because they weren't as deep or as clear, that ended up being a disrupted relationship that we've just gotten around to repairing during this period of uprising. And then, you know, we had relationships with the UE and the warehouse workers, so we were able to pull in the Oreo factory workers into that day of action too.<sup>51</sup>

Without the broader focus on fighting neoliberalism across the city, CTU would not have built genuine connections with organizations like the Black Lives Matter movement and the Fight for 15 campaign. The solidarity with other unions across the city also showed the power of CORE leadership, as unions in other sectors understood their struggle and connected to the broader fight for public services and more power for working people.

In videos of the April 1st day of action, thousands of people in the streets are seen with signs condemning the broad neoliberal vision in the city, from the mayor to the Chicago Police Department to even McDonald's low wages. Instead of the sea of red CTU shirts in 2012, this day of action is visibly more diverse, with many people wearing Black Lives Matter shirts and supplementing their red solidarity with colors representing their own organizations or other

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<sup>51</sup> Jackson Potter, in conversation with the author, November 2020.

unions.<sup>52</sup> Still, these activists showed up for CTU and its teachers and made sure that their signs, chants, and speeches connected back to funding public education. One large banner sums up the sentiment of this broad coalition showing up for public schools and CTU, reading, “Rock beats scissors -- solidarity beats cuts.”<sup>53</sup>

There were many efforts leading up to the April 1st strike to engage community organizations, parents, and others across the city to support the teachers’ demands and push the rhetoric that the city was “broke on purpose” because of their funding decisions that favored private corporations and corrupted elites instead of public services. The *Chicago Reporter* describes community contract forums sponsored by Parents 4 Teachers, Kenwood Oakland Community Organization (KOCO), and Blocks Together, three community organizations with either deep histories of activism in their communities or close ties to the union.<sup>54</sup> The union also held multiple rallies, a particularly memorable tactic employed during the 2012 negotiations, which brought together activists from across the city.

One particularly large rally on June 9, 2015 brought together many organizations to “stand united with CTU.”<sup>55</sup> At that rally, teachers shared their stories as cars drove by, honking in support. In the sea of red, teachers held signs representing their neighborhoods, showing the geographic diversity as they fought to save the pensions for their retirees and gather support before the contract expired.<sup>56</sup> Gloria Warner, the President of Action Now and a retired school teacher, spoke at that rally, saying, “we need a fair budget to be passed.... We need the revenue

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<sup>52</sup> Aaroncynic, “CTU April 1 Day of Action,” April 2, 2016, YouTube video, 2:44, <https://www.youtube.com/watch?v=wVKJZAe7QA>.

<sup>53</sup> RiverCoatl, “Chicago Teachers Union Goes on a One-day Strike,” April 4, 2016, YouTube video, 6:29, <https://www.youtube.com/watch?v=1AIap2j1Mrw>.

<sup>54</sup> Sanchez, “CTU files unfair labor complaint.”

<sup>55</sup> “Will you Stand United with CTU on June 9?” Cook County College Teachers Union, accessed April 26, 2021, <https://ccctu.org/will-you-stand-united-with-ctu-on-june-9/>.

<sup>56</sup> Labor Beat, “CTU Rally for Fair Contract,” YouTube video.

that LaSalle Street took.”<sup>57</sup> Action Now describes itself as a “pillar of liberation and strength in Chicago” that fights for “the most marginalized among us at all cost.”<sup>58</sup> CTU’s struggle had become a struggle of the most marginalized in the city, drawing the president of such an organization to speak on the importance of public school funding along the demands of the union as a social justice issue, not just an issue for teachers to have better wages.

Several other groups that were seemingly unrelated to CTU’s contract negotiations spoke at the rally as well, connecting their own struggle to that of the teachers. Organizations included the Amalgamated Transit Union Local 241, whose president, Tom C. Sams Jr., said, “Listen, transit has been quiet for a long time. But thanks to the organizing of the teachers, we’re out here in support of you because this is about working families... Just so you all know, this is just the first of many. We’re there when you need us.”<sup>59</sup> The representative speaking on behalf of the Kenwood Oakland Community Organization specifically named the union’s demands to stop charter expansion, reduce class sizes, and implement restorative justice coordinators in every school as tangible reasons why the activists naturally stood in solidarity with the union.<sup>60</sup> All these examples show a commitment to the movement by CTU, community organizations, and other unions across the city. This accumulation of political capital through this form of coalition organizing is one of the most successful elements of CTU’s social movement unionism and one that does not receive enough recognition in the current literature.

The coalition in 2015 and 2016 was stronger than ever, but it still certainly faced challenges. Betting on a grassroots coalition to overpower the decision makers on the other side

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<sup>57</sup> Ibid.: LaSalle Street is the financial center of Chicago, essentially the Wall Street of the city, indicating the union’s condemnation of neoliberal forces and capitalist powers.

<sup>58</sup> “Action Now - Social Justice Organization, Chicago, IL,” *Action Now Chicago*, accessed April 26, 2021, <https://actionnowchi.org/>.

<sup>59</sup> Labor Beat, “CTU Rally for Fair Contract,” YouTube video.

<sup>60</sup> Ibid.

of the bargaining table involves a lot of risk, but it is clear that CTU decided to lean heavily on this strategy of social movement unionism during this negotiating process.

## **Policy**

The complexities of this bargaining process presented great challenges to CTU members. Given a contentious mayoral election, shifting relationships with charter schools, an expired contract, multiple lawsuits on both sides of the bargaining table, and the impending \$1.1 billion budget deficit, CTU and CPS both had a lot at stake. Given the fiscal crisis, CTU found itself on the defensive during this strike, understanding that CPS wanted to cut and save money instead of adding more robust benefits or policies. Still, CTU presented contract proposals that demanded more than the bare minimum, using direct asks and broader ideas to continue its practice of social movement unionism even with the understanding that not all their demands would be met. This allowed for the union to push for more than most expected and continued the conversation about social justice that began in 2012. This section analyzes CTU's practice of social movement unionism by comparing the union's contract demands to the outcomes in the final labor agreement. Successful social movement unionism achieves many of these demands because of its political capital; CTU's labor agreement in 2019 is widely considered successful by these standards. The chapter then addresses CTU's broader demands to see how well they articulate a vision beyond wages and working conditions. CTU also is successful in this element of social movement unionism as they address the neoliberal policies at the root of systemic problems.

### *Contract-Based Demands*

On March 26, 2015, CTU released its first official set of contract proposals, demanding smaller class sizes, more time for preparation, and the hiring of more support staff.<sup>61</sup> There were relatively few tangible demands in this first proposal, with most of the demands focusing on broader social justice issues that were not legally negotiable under state law. Section 4.5 of the Illinois Educational Labor Relations Act clearly states that bargaining within a city having a population greater than 500,000 (which only applies to Chicago) can only cover specific topics, mostly bread-and-butter issues like wages and immediate working conditions.<sup>62</sup> This essentially outlaws the most core tenant of social movement unionism, but that did not stop CTU in 2012 or during this negotiation. The first proposal notably did not make any specific demands for increased wages or benefits. Less than two months later, CPS had rejected “nearly every one” of CTU’s demands and even proposed a 7% pay cut, according to union officials in the negotiating meetings.<sup>63</sup> This seven percent cut would come from ending “pension pickups,” meaning that CPS would stop contributing to the pensions of central office and non-union employees.<sup>64</sup> Essentially, the district announced it would slowly stop “picking up” the 7 percentage points of the 9 percent pension contribution required of nonunion workers and signaled it would be willing to do the same for union workers in the upcoming contract. Clearly, the two parties disagreed deeply at this point in the negotiating process.

CTU responded to these CPS threats with a more detailed set of demands organized into “five pillars,” emphasizing at each point their rallying cry that CPS was “broke on purpose” as a

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<sup>61</sup> Melissa Sanchez, “CTU unveils first set of contract proposals,” *Chicago Reporter*, March 27, 2015, <https://www.chicagoreporter.com/ctu-unveils-first-set-of-contract-proposals/>.

<sup>62</sup> Illinois General Assembly, *115 ILCS 5 / Illinois Educational Labor Relations Act*, accessed April 26, 2021, <https://www.ilga.gov/legislation/ilcs/ilcs3.asp?ActID=1177&ChapterID=19#top>.

<sup>63</sup> Melissa Sanchez, “CPS wants 7 percent pay cuts, union ‘insulted,’” *Chicago Reporter*, May 5, 2015, <https://www.chicagoreporter.com/cps-wants-7-percent-pay-cuts-union-insulted/>.

<sup>64</sup> “CPS to end pension pickup for central office employees,” *ABC 7 Chicago*, August 12, 2015, <https://abc7chicago.com/cps-pensions-pension-pickup-contribution-employee/923881/>.

way to cut funding to public schools and instead continue to support corporate interests and neoliberal policies. The five pillars read: “Educators are Professional Experts and Role Models,” “The Schools Chicago’s Students Deserve,” “Schools are Anchors of the Community,” “Students are Human Beings,” and “Educators Cannot Achieve Equity Alone.”<sup>65</sup> (For a detailed description of the proposals under each pillar, see figure 3.1.) Many of CTU’s demands were not issues that could lead to a strike because they fell outside the narrow parameters of state labor laws. This means that CTU could propose these items and discuss them in the negotiating meetings, but they could not begin or extend a strike based on these broader issues, limiting the capacity for militant social movement unionism. With the five pillar structure, CTU took broader ideas and broke them down into tangible issues, though not all of these issues could be addressed in the same way or with the same power.

**Figure 3.1: CTU Contract Demands and Results for 2016 Labor Agreement**

<b>Demands<sup>66</sup></b>	<b>Result<sup>67</sup></b>
Increase teacher autonomy in planning and assessment.	Teachers are no longer required to have a set format for submitting lesson plans (p 12).
Increase planning time for teachers.	Not much, but ensured preparation time every day of the school year (2).
End all contracts with Teach for America and transfer to Grow Your Own program.	No mention in contract.
Allow charter school unionization.	No mention in contract.
Increase cleaning and vermin control procedures.	No mention in contract.

<sup>65</sup> CTU Communications, “BROKE ON PURPOSE: Board of Ed continues to peddle budget myths to justify its starving of classrooms,” *Chicago Teachers Union*, May 5, 2015, <https://www.ctulocal1.org/posts/broke-on-purpose-board-of-ed-continues-to-peddle-budget-myths-to-justify-its-starving-of-classrooms/>.

<sup>66</sup> Ibid.

<sup>67</sup> “2015-2019 Tentative Agreement: Agreement Between the Board of Education of the City of Chicago and the Chicago Teachers Union, Local No. 1, American Federation of Teachers, AFL-CIO,” October 2016.

Make all schools air conditioned by 2020.	Air conditioning in all schools by the 2018-2019 school year (56).
Reduce class sizes with an enforceable class size maximum for all grades.	No maximum class size, but some support for over-enrolled (32+ students) K-2 classes (8).
Have all schools staffed with full-time art, music, and physical education teachers and hire a full-time librarian for each school.	Adds art into most extracurricular language, but no promise for increased staffing of these professionals.
Invest substantial resources into at least 50 Sustainable Community Schools.	Agreed to fund between 20 and 55 community schools (3-4).
Halt charter school expansions.	“There will be a net zero increase” in charter schools during this contract period, with enrollment not exceeding 101% of 2015-2016 levels (56).
Ensure all CPS employees and subcontracted employees receive at least \$15 per hour for work related to CPS.	No clear statement on this in contract.
Improve and clarify the benefit pension plan.	Ends pension pick-up for teachers hired after 2016, keeps pension pick-up for currently hired teachers. Adds early retirement incentives and promises to petition the Illinois government to increase property taxes to pay for pension costs (56).
Cap standardized testing at six school hours per school year.	No mention in contract.
Prohibit standardized testing for students before 3rd grade.	No mention in contract.
Free pre-K for low-income students and full day early childhood education.	No mention in contract.
Ensure schools with the highest numbers of homeless students have staff to address this.	Includes possibility of homelessness services for designated Community Schools (4).
Increase school counselors and clinicians in schools and have a nurse in each school.	No mention in contract.
Staff a full-time restorative justice coordinator for every school and limit police.	Includes possibility for Restorative Justice Coordinators in designated Community Schools (4).

Increased access to multicultural curriculum.	Declares that schools must, “to the extent possible,” provide “current and culturally relevant curriculum.” (2)
Tax financial transactions and return TIF funds.	No mention in contract.
End all CPS contracts with financial institutions that engage in “predatory financial deals.”	No mention in contract.
Secure legislation to repeal section 4.5 of the ILELRA and establish an elected school board.	No mention in contract.
Support legislation to turn six low-level, non-violent felony crimes into misdemeanors.	No mention in contract.

CPS and CTU would continue a bitter fight for the rest of the contract negotiation process, with CPS pulling back an offer of a one-year contract retaining pension pick-up and capping charter growth, instead releasing a budget that called for layoffs and massive budget cuts.<sup>68</sup> After the contract expired, the district stopped paying certain salary increases outlined in the previous contracts, leading to those unfair labor charges filed by CTU against CPS. Layoffs, rallies, fact-finding, and more continued to increase pressure until the final agreement was reached nearly two years after discussions began.

In the end, CTU was able to achieve some substantial gains, though most of the broader demands remained unreachable given the city’s financial situation. The most impactful win for the union in their fight against neoliberalism was the contract’s suspension on the expansion of charter schools. For the length of the contract, CPS actually agreed not to add to the number of authorized charter schools in the city, a massive win for the union and one that indicates great potential for social movement unionism to combat neoliberalism, even in a place with strict labor

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<sup>68</sup> Spiezio, “CTU contract talks timeline.”



laws. Pension pick-ups for current employees would continue and the Board even agreed to petition the Illinois General Assembly to implement a progressive income tax and an increase in property taxes in order to better fund public services.<sup>69</sup> The addition of art teachers to the language of extracurricular activities represents another success, though CTU was unable to secure promises for more nurses, counselors, or other essential staff members. The Board also would not agree to a maximum class size, something that many teachers hoped for. Labor scholar Bob Bruno characterizes the contract by saying,

The 15/16 strike was sort of the Second Act of the first resistance. In 2012 you had to do something truly defensive, fight off the beast at the door, make a strong statement that things were going to be different in Chicago. They didn't really achieve any of those larger goals, but they did build a social movement in Chicago. In 2015/2016 that movement unfolded... [they got a] cap on charter schools, shifted money out of TIF. The mayor said he couldn't move another penny, but he moved some pennies!<sup>70</sup>

Overall, many of the changes in this contract were not necessarily those of increased or decreased funding, but instead of changes to teacher practices and administrative procedures. This makes sense given the fiscal crisis. And although the ending of pension pick-ups for new hires is not what CTU would have wanted, the capacity to avoid that for current members is certainly a massive bargaining win.

### *Broader Demands*

Union leaders included provisions in their very first set of contract proposals that were not legally negotiable under state law. From the beginning, CTU leadership chose to promote “some of the more public demands... which are intended for people to look at politically, in the context

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<sup>69</sup> “2015-2019 Tentative Agreement,” 56.

<sup>70</sup> Dr. Robert Bruno (labor scholar, University of Illinois), in conversation with the author, November 2020.

of education as a social movement,” according to then-vice president Jesse Sharkey.<sup>71</sup> These political demands followed a specific viewpoint: CPS and city government were “broke on purpose,” leaving working people behind in neoliberal efforts to privatize public services and favor business interests.

Many of the contractual “wins” for CTU during this period were either smaller administrative details or avoiding deep cuts. Many of the broader demands against privatization and for social justice cannot be found in the contract, though some of these demands were met. CTU demands included a moratorium on new charter school openings and a fund to train teachers through the Grow Your Own program instead of Teach for America.<sup>72</sup> As mentioned above, the moratorium on charter school openings shows that throughout CTU efforts to unionize charter school teachers, they were still committed to combating privatization and protecting public schools. This is extremely important and deserves more attention as a major, even if temporary, pushback against neoliberal policies. It should be noted that the charter school expansion clause is a side letter to the contract, however, meaning that its legal strength may be in question. Other side letters on progressive taxation and legislative actions are not as strong as if they were placed in the main labor agreement. However, they still provide a commitment from both parties to work towards these policies.

Overall, the union’s broader messaging kept coming back to the theme of rejecting neoliberalism and embracing progressive change. During a rally on June 9, 2015, President Lewis said,

Let’s talk about what’s really happening. We have people who are trying to set the working class at odds with poor people. That’s what we have set up for us right now. Working class people don’t want to pay more property taxes, that makes sense. We

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<sup>71</sup> Sanchez, “CTU unveils first set.”

<sup>72</sup> CTU Communications, “BROKE ON PURPOSE.”

understand that. Poor people are trying to get help. We understand that. We have a governor who thought it was okay to cut funding to Autism on World Autism Day, so clearly priorities aren't shifted in the right direction. So, here's what I'm asking you, who is the one set of people that could solve this problem by doing one thing? Paying their fair share.... We aren't asking the right people the right question. There's a person in our city right now who could solve all of the pension fund crisis, not by reaching into his checkbook and taking food out of his children's mouths, but just by paying his fair share of taxes."<sup>73</sup>

Of course, CTU leadership could not demand that Mayor Emanuel and all rich residents pay more taxes as a result of their contract negotiations, but they could continue to promote the clear connection between school funding and regressive taxation. In 2012, CTU worked to educate the public about the Tax Incremental Financing (TIF) districts, criticizing them as a way for public money to support private, corporate interests instead of public needs. By 2015, criticizing TIF was more mainstream, even among rank-and-file teachers, allowing leadership to push a broader narrative that brought in even more of their expanding coalition. CTU and its allies were more capable of critiquing neoliberalism because of its more established leadership and strengthened coalition, creating enough political capital to effectively demand more during negotiations. The fiscal crisis and proposed cuts to services also brought more media attention to this discussion, giving CTU the spotlight to articulate their vision as they practiced social movement unionism.

## **Conclusion**

If the 2012 strike established CORE's leadership in CTU as a force to be reckoned with, the 2015-2016 contract negotiations solidified the coalition of supporters from across the city and strengthened CORE's practice of social movement unionism even in the face of mounting challenges. It is not a surprise that the 2015-2019 contract agreement between the two parties left room for want on both sides, given the massive deficit and other fiscal crises. Still, CTU officials

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<sup>73</sup> Labor Beat, "CTU Rally for Fair Contract," YouTube video.

articulated a vision for the future of the city and public education that pushed beyond what was legally or realistically possible. The repeated cries of a city “broke on purpose” sent an important message to the city that this union was getting better at its practice of social movement unionism and beginning to clarify a vision that could rebuke neoliberalism. With the organizing of charter schools and the relationships built with community organizations and other unions in the city, CTU’s political capital reached a new peak. Even though Mayor Emanuel won reelection, there were ways in which CTU changed the conversation around his second term. Mayor Emanuel would not run for a third term, clearing the way for new leadership in the city before the expiration date of this contract. The following negotiating period would include a new mayor, a new CTU president, and a new financial situation across the city. Would the foundation of leadership and relationships be enough for CTU to gain more in the following contract?

## Chapter 4: The 2019 Strike

*Before, it was fighting to reduce the cuts, but this was more like, we need to put back some of what's been taken away. And we're gonna fight for this money to get back invested into the schools.... And the messaging wasn't around salaries, job security, benefits or that kind of thing.... Schools are one of the main places that are stable, and we can invest in the people there through schools.*

-Sherry Nelson, CTU rank-and-file teacher

### Introduction

When the Chicago Teachers Union (CTU) took to the streets in the fall of 2019, a lot had changed since the founding of their leadership's caucus, the Caucus of Rank and File Educators (CORE), almost a decade earlier. The union had built a movement, harnessing their leadership to build relationships within the union and across the city, and they had two contracts to show for it. CTU had gained immense political capital during their past seven year of organizing, despite legal and financial barriers. Even if the past two contracts did not accomplish all their demands, CTU still achieved quite a bit over the negotiations and avoided deep cuts during a fiscal crisis.

Now, they were back on the streets, striking for the second time in less than a decade. The conversations and demands had evolved, the relationships with community organizations were stronger, and rank-and-file members were still committed to CORE's vision and practice of social movement unionism. Still, this strike presents some challenges and questions for social movement unionism as a strategy for combating neoliberalism. In June 2018, CTU president Karen Lewis announced that she would step down from her role to take care of her health.<sup>1</sup> Without the power of this iconic figure leading CTU negotiations, the union would face a test of leadership and the rank-and-file's commitment to CORE's vision. Lewis was a household name

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<sup>1</sup> Meha Ahmad, Tony Sarabia, "Chicago Teachers Union Powerhouse Karen Lewis Steps Down," *WBEZ*, June 26, 2018, <https://www.wbez.org/stories/chicago-teachers-union-powerhouse-karen-lewis-steps-down/84fb82b0-2de7-48e8-a385-d4c8da78c426>.

in Chicago; would her successor be able to wield sufficient power? Additionally, Chicago had elected a new mayor. In April 2019, Mayor Lori Lightfoot became the first openly lesbian Black woman to be elected mayor of a major city in the United States.<sup>2</sup> CTU did not back Lightfoot during the election, and while they were cautiously optimistic at the outset of her term, relations quickly soured. With two new people leading each side of the negotiating table, how would the practice of social movement unionism change?

Finally, the city was no longer running such a deep budget deficit, with a new governor able to pass state budgets and properly fund city services. Would CTU be able to achieve their policy demands now that the financial situation had shifted? In many ways, the 2019 strike represents an opportunity to further generalize social movement unionism as the practice faced new challenges and opportunities. This chapter, like the previous ones, looks at the three elements of social movement unionism: leadership, relationships, and policy, and examines the extent to which CTU successfully practices social movement unionism and its capacity to combat neoliberalism. As this chapter shows, by the end of this negotiating cycle, CTU emerged with a contract widely perceived as successful. These policy wins confirm that, when practiced over time, social movement unionism can achieve tangible, contract-based results related to the broader fight against neoliberalism.

## **Background**

Before diving into the analysis of this strike, this section provides a brief overview of the timeline of events in this chapter. Mayor Lightfoot's team and the new president of CTU, Jesse

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<sup>2</sup> Bill Ruthhart, "Lori Lightfoot elected Chicago, making her the first African-American woman to lead the city," *Chicago Tribune*, April 2, 2019, <https://www.chicagotribune.com/politics/elections/ct-met-chicago-election-results-mayors-race-lightfoot-preckwinkle-20190402-story.html>.

Sharkey, worked through negotiations shortly after Lightfoot began her term in May 2019, but by the end of the summer, both sides were at a standstill. In September, CTU held a strike authorization vote and even a rally with Senator Bernie Sanders and Senator Elizabeth Warren to gain momentum.<sup>3</sup> By the end of the month, Chicago Park District employees, some charter school network teachers, and CTU had all voted to authorize a potential strike, resulting in over 35,000 employees threatening to halt work.<sup>4</sup> On October 16, 2019, Chicago Public Schools cancelled classes as teachers took to the streets. With no knowledge of how long the strike would last, negotiations continued to sour. After 11 days of striking, CPS support workers in SEIU 73 finally reached an agreement with CPS but refused to cross the picket lines and return to work until the teachers also had an adequate agreement.<sup>5</sup> Finally, after 14 days of cancelled classes and difficult negotiations, it appeared that both sides had reached an agreement on all issues except the issue of making up the school days missed during the strike. On October 31, 15 days after the strike began, CTU suspended their strike, ending the longest Chicago teachers strike in three decades.

## Leadership

With a new CTU president, union leadership faced a test of its rank-and-file membership's commitment to CORE's values without the strong leadership style of Karen Lewis. Jesse Sharkey, the new CTU president, did not have the same name recognition or speaking style,

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<sup>3</sup> Nader Issa and Fran Spielman, "Bernie Sanders rallies with Chicago teachers as strike vote gets underway," *Chicago Sun-Times*, September 24, 2019, <https://chicago.suntimes.com/2019/9/24/20882510/bernie-sanders-teachers-union-strike-authorization-ctu-lori-lightfoot>.

<sup>4</sup> "The 2019 Chicago Teachers strike," *Chicago Sun-Times*, accessed April 27, 2019, <https://chicago.suntimes.com/news/2019/10/15/20915723/chicago-teacher-strike-2019-cps-ctu/archives/5>.

<sup>5</sup> Nader Issa and Jacob Wittich, "CPS support workers make tentative deal to end strike but won't cross teachers' picket lines," *Chicago Sun-Times*, October 27, 2019, <https://chicago.suntimes.com/2019/10/27/20935498/cps-seiu-73-strike-teachers-ctu-agreement-palmer>.

making it more difficult to gather massive crowds for militant rallies. This section looks at the transition from Lewis to Sharkey and how union leadership changed during the 2019 contract negotiations and strike. It then analyzes the rank-and-file membership during this period, characterizing the mood and overall sentiment of the teachers during the strike. As described in previous chapters, social movement unionism requires energizing, accountable leaders with an engaged rank-and-file membership committed to a shared vision. Without Lewis leading the rank-and-file, it is possible to see the extent to which CORE's strategy can inspire teachers in the absence of a charismatic leader, providing further insight into potential roadblocks for social movement unionism. Ultimately, while it is unclear how long this commitment will last, it appears that during this negotiating period CTU's rank-and-file remained engaged, likely because of the nature of going on strike and because of the previous foundational leadership of the years past. Still, this period also saw the first real opposition to CORE from within CTU since their election in 2010. While this opposition remained a small minority, it could foreshadow future discontent and burnout from social movement unionism.

### *Union Leadership*

Jesse Sharkey, the son of a schoolteacher, began organizing more directly as a member of CTU when the district announced they would be transforming the high school where he taught into a military academy.<sup>6</sup> A co-founder of CORE, he was elected vice president in the caucus' first election and remained Karen Lewis's VP until her retirement.<sup>7</sup> He began taking on much of the

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<sup>6</sup> Carol Felsenthal, "How Jesse Sharkey Became the New Head of the CTU," *Chicago Magazine*, November 21, 2014, <https://www.chicagomag.com/Chicago-Magazine/Felsenthal-Files/November-2014/How-Jesse-Sharkey-Became-the-New-Head-of-the-CTU/>.

<sup>7</sup> Mitchell Armentrout, "CTU president Jesse Sharkey wins re-election," *Chicago Sun-Times*, May 18, 2019, <https://chicago.suntimes.com/2019/5/18/18630524/ctu-sharkey-election-chicago-teachers-union-core>.



presidential responsibilities after Lewis’s cancer diagnosis in 2014, making him a natural choice to lead the union after the announcement of her retirement in 2018. In her retirement statement, Lewis said, “Given my health challenges, it is unlikely that I will return to my beloved classroom. In light of that, and after much consideration, I recently submitted a retirement request to the Chicago Teachers Pension Fund, ending my time as an educator with Chicago Public Schools.”<sup>8</sup> The word choice in this statement speaks to the grassroots nature of Lewis’s leadership. Until the very end, she identified first and foremost as an educator, not as a union official, and spoke about the classroom as if she had never stopped being a rank-and-file teacher. This is one of the many reasons that Lewis was able to inspire such a movement within the union and across the city.

The election of Sharkey, however, did have vocal opposition for the first time since CORE came to power. This time, the opposition wanted to bring the union back to “bread and butter” issues and away from its progressive politics.<sup>9</sup> The challengers formed a group called Members First, which criticized CORE’s focus on electoral politics and issues seemingly unrelated to the classroom. The caucus is described as “a small but vocal cadre of current and retired educators running on bread-and-butter issues like teacher pay and working conditions.”<sup>10</sup> Leaders in the Members First caucus, including its candidate for president, Therese Boyle, said that CORE leadership had become less transparent and less accountable to its membership.<sup>11</sup>

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<sup>8</sup> Matt Masterson, “CTU President Karen Lewis to Retire,” *WTTW*, June 22, 2018, <https://news.wttw.com/2018/06/22/ctu-president-karen-lewis-retire>.

<sup>9</sup> Cassie Walker Burke and Yana Kunichoff, *Chalkbeat Chicago*, May 18, 2019, <https://chicago.chalkbeat.org/2019/5/18/21108192/chicago-teachers-union-leadership-retains-power-despite-vocal-challenger>.

<sup>10</sup> Yana Kunichoff, “With union elections on horizon, challengers try and build momentum around ‘bread-and-butter’ issues,” *Chalkbeat Chicago*, May 1, 2019, <https://chicago.chalkbeat.org/2019/5/1/21108044/with-union-elections-on-horizon-challengers-try-and-build-momentum-around-bread-and-butter-issues>.

<sup>11</sup> *Ibid.*

This sentiment was echoed in one interview for this thesis, which raised questions about the rhetoric and public appearance of CORE leadership in comparison to its actions. As the first contested election in six years, the existence of Members First certainly presents a challenge to the future of CORE, something that will be discussed more in Chapter 5. The existence of Members First and their calls for CORE to be more accountable raises questions about the possibility for long-term leadership to remain tied to its grassroots origins and may present a barrier to social movement unionism over time.

The task for Sharkey and his vice president, Stacy Davis Gates, would be to gather that momentum and continue the movement without Karen Lewis. Jackson Potter, a co-founder of CORE, said of the change in leadership: “I mean, nobody is quite as compelling of a leader or has the gravitas and the notoriety of Karen Lewis. Stacey, I think, comes close but is a different leader. Karen was a celebrity, a political celebrity in her own right and sort of occupied this particular historic moment.”<sup>12</sup> The historic moment may have shifted, but CORE leadership did have the experience of two contract negotiations under their belt because the new leadership had worked closely with Lewis, sometimes even taking on responsibilities without her when she was sick. In some ways this created a natural continuation of leadership rhetoric and strategy.

Still, new leadership always will present new challenges. Dr. Robert Bruno, a prominent labor scholar, characterized the shift. He said, “I think Jesse Sharkey is a different kind of leader than Karen was. Stacey is a different kind of Vice President than Jesse was, they brought different styles and attitudes to the table. One of the things you’ll learn when you look at collective bargaining and what kinds of things contribute to how contracts turn out is that the

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<sup>12</sup> Jackson Potter (CORE co-founder), in conversation with the author, November 2020.

people are really important.”<sup>13</sup> The people are important, yes, but at least in this instance, shifting the head of the union to an experienced, second-hand man while keeping much of the caucus and other leadership roles the same allowed for social movement unionism to continue. This is important because if Lewis’s departure drastically changed the perception of CTU, it is possible that social movement unionism would have not actually been achieved during earlier contract negotiations, meaning the rank-and-file rallied around their loyalty to a charismatic leader, not broader policy visions. Instead, the capacity for this role to transfer from a charismatic, inspirational Black woman to a nerdier, sweatshirt-wearing white man shows the strength of the movement built over the previous years.

As the transition went on, it became clear that most people supported the union’s ideology and vision as a whole, not just the leadership of Karen Lewis. Potter spoke of this movement building, saying,

When you do polling you notice that oftentimes our polling is not quite as high as it was when Karen was at the apex of her popularity, like when she was running for mayor, but it hasn’t taken a significant downward trend either. It’s a couple points, so it’s noticeable, but not qualitatively all that different. I would argue that our advocacy and the marks we’ve made and the fights that we’ve focused on have set in stone the public’s view of us rather than create a one-time bump.<sup>14</sup>

This movement building is a key tenet of social movement unionism, and even a smaller shift in leadership can be a great test of strength for understanding the potential for long-term activism within the movement. Unions practicing social movement unionism will need to prepare for challenges during leadership changes, especially if internal opposition arrives. Still, it is possible to successfully transfer power, especially if there is an opportunity as galvanizing as a strike.

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<sup>13</sup> Dr. Robert Bruno (labor scholar, University of Illinois), in conversation with the author, November 2020.

<sup>14</sup> Jackson Potter, in conversation with the author, November 2020.

### *Rank-and-File Membership*

CTU teachers remained committed to CORE and Karen Lewis's vision, but for most teachers the 2019 strike felt different than the 2012 strike, and not just because there was a new leadership team. Regardless, the existence of a strike reengaged members in a way that the 2015-2016 negotiations did not, affirming the importance and even necessity of strikes for the practice of social movement unionism. In interviews, many teachers characterized the strike as angrier and more difficult. Bruno discusses this shift, saying,

In 2012 it felt pretty joyful, it felt like an enormous celebration. Teachers taking to the streets, building alliances with the community, Black and brown people together speaking up for kids, fighting against poverty. Karen Lewis was just an absolutely mesmerizing star. She was joyful, she was tough, she was full of smiles and attracted people by and large, so there was kind of this explosion of joyful warriors around her. In 2019, it seemed more like class wars. It had a much sharper feel to it. And you know, there's different people involved. And I think they expected more from Lightfoot, maybe they were more disappointed.<sup>15</sup>

That disappointment in the newly elected Mayor Lori Lightfoot turned into anger for many teachers because of the length of the strike and the sense that she refused to agree to demands she campaigned on. This was their third contract negotiation in less than a decade that resulted in a strike or a semi-strike, as happened in 2014-2016. This anger and continual striking present another possible challenge for social movement unionism. When this kind of unionism relies on activating membership to fight against an existential enemy in neoliberalism, it can be difficult to keep rank-and-file members from becoming too agitated and eventually burnt out. Bruno describes this challenge of high expectations, saying,

As a necessary byproduct of being militant, you have to mobilize. You have to rub that wound pretty raw. Once you've got your membership really agitated, you have to figure out a way to get them to calm down, because at some point you have to say "yes" and

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<sup>15</sup> Dr. Robert Bruno, in conversation with the author, November 2020.

sign a contract. Not everything that's happening day-to-day is necessarily a frontal attack on the union. Some level of cooperation is going to be required.<sup>16</sup>

These heightened expectations and agitation have the potential to manifest themselves in discontentment with the current leadership. There is certainly a possibility that an increasingly militant membership can turn against their leadership, seeing them as a sellout when they inevitably have to accept an imperfect contract. Social movement unionism has to be practiced as a marathon, not a sprint, but even as strikes have important roles in mobilizing members, there is an inevitable point where that mobilization will turn into exhaustion or further anger.

Luckily for CTU, it appeared that the membership mostly continued to support their leadership, and their militant anger towards neoliberal elites did not turn into resentment for the movement. This can be seen both in interviews with teachers and in the reelection of CORE leadership in 2019, just before the strike, where CORE won about two thirds of the vote.<sup>17</sup> On the streets during the strike, teachers remained engaged despite the length of the strike and the bitterness of the fight at times. John Boggs, a high school teacher and union delegate during the 2019 strike, describes his experience, saying,

When I look back and think about why it wasn't as romantic or as fun [as 2012], it was because I was always thinking, "Okay, I've gotta have people here, I've gotta make sure this message is out, I gotta make sure there's posters, I gotta stop by the union and get flyers," so like, I had grown up.... I wasn't sure that everything we were asking for we were going to get. And I was afraid. I was really afraid like, "Are we really going to ask for all of these things?" And in the end it was a really good lesson for me. When we work together, we win.<sup>18</sup>

While Boggs certainly had personal reasons to feel less idealistic about this strike, his fear and the gravity of the situation were common for rank-and-file teachers across the city. Other

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<sup>16</sup> Dr. Robert Bruno, in conversation with the author, November 2020.

<sup>17</sup> Armentrout, "CTU president Jesse Sharkey wins."

<sup>18</sup> John Boggs (CTU delegate), in conversation with the author, November 2020.

teachers described the 2019 strike as a continuation of the conversation that began in 2012, but heavier. It was no longer as necessary to educate other teachers or community members about the basic issues that CTU was fighting for. The past two contract negotiations had been quite effective in bringing awareness to the struggles of teachers and students across the city. Now, with the possibility of substantive progress on many union demands, the stakes became more outcome-oriented instead of focusing on internal union changes or coalition building. Of course, unions will always seek to make gains in their contracts, but after nearly ten years of demands, organizing, and activism, the leadership would have to deliver some real wins for teachers in order to keep them committed and engaged in the future.

### **Relationships**

For the first nine years of CORE's leadership, Mayor Rahm Emanuel had been the union's single figure representing all that was wrong with neoliberalism in Chicago. He encompassed business interests, elitism, corruption, and a disrespect for public education. In 2019, CTU suddenly had a new figure at the head of Chicago's city government: a Black lesbian who ran on a progressive platform. Newly-elected Mayor Lori Lightfoot presented a myriad of new challenges for union leadership and rank-and-file membership. The juxtaposition between her progressive campaign promises and her rhetoric and policy decisions once in office made it difficult for teachers to unite the city around a common enemy. These challenges, however, provide important insight into the capacity of social movement unionism to adapt through changes in power holders. If social movement unionism relies on a rejection of political and economic power holders and instead emphasizes coalition building among community organizations, how do new political players shift this dynamic? In this instance, at least, CTU continued their practice of social

movement unionism, and for the most part, they succeeded. This required CTU to rely on broader framing messages to transition from anti-Emanuel rhetoric to one that indicted the very institutions and systems Mayor Lightfoot came from and continued to represent. This, combined with continued coalition building through the mobilization of organizations for the strike, continued to grant CTU necessary political capital.

### *Power Holders*

Lori Lightfoot was elected the mayor of Chicago on April 2, 2019, less than a year before CTU would go on strike.<sup>19</sup> Lightfoot had lived in Chicago since 1986, serving as a senior equity partner at the prominent law firm Mayer Brown LLP.<sup>20</sup> She had also served in Emanuel's administration as president of the Chicago Police Board and chair of the city's Police Accountability Task Force, which gave her a record that made many progressive city activists suspicious of her calls for equity and transformation around policing and race. While she did not have the name recognition or typical political party ties like other candidates, including Bill Daley (brother and son of two former mayors) and Susana Mendoza (State Comptroller), she successfully advanced to the second round runoff race against Cook County Board President Toni Preckwinkle.<sup>21</sup> National news stories highlighted the historic nature of a runoff in a major city between two African American women, and both women were portrayed as equally

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<sup>19</sup> After major fallout for his role in handling the 2014 police shooting of teenager Laquan McDonald, Mayor Rahm Emanuel announced he would not seek reelection, opening the field for a tight competition. This would also set Lightfoot up for a term defined by her relationship to policing.

<sup>20</sup> "About Mayor Lori E. Lightfoot," *City of Chicago*, accessed April 27, 2019, [https://www.chicago.gov/city/en/depts/mayor/supp\\_info/about\\_the\\_mayor.html](https://www.chicago.gov/city/en/depts/mayor/supp_info/about_the_mayor.html).

<sup>21</sup> "Here's how Chicago's historic Election Day unfolded," *Chicago Tribune*, February 26, 2019, <https://www.chicagotribune.com/news/local/politics/ct-met-cb-chicago-election-day-20190226-story.html>.

progressive.<sup>22</sup> CTU, however, favored Preckwinkle and found distinctions in policy preferences, labeling Preckwinkle as the more progressive of the two and expressing distrust in Lightfoot's connections with Mayor Emanuel. In former CTU President Karen Lewis's statement of endorsement for Toni Preckwinkle, she said,

As a former teacher, Toni's leadership speaks for itself and I know she will fight for the schools our children deserve. Not only that, she is the only one with a plan.... Toni is a leader and someone who will stand up for all people in this city. After finally getting rid of Rahm, why would voters want to return control of our public resources to the exact same people who attempted to push working-class families and Black and Brown people out of the city?<sup>23</sup>

Lewis' message, influential even in retirement, was clear: do not trust anyone associated with Mayor Emanuel.

Toni Preckwinkle echoed that sentiment, attacking Lightfoot on the campaign trail and calling her a "wealthy corporate lawyer."<sup>24</sup> An investigation by the *Chicago Tribune* into Lightfoot's litigation record also drew concerns. It found that Lightfoot had "represented corporate clients accused of racial discrimination, as well as police and prosecutors accused of the kind of misconduct she has criticized as a candidate. Lightfoot [had] also made millions of dollars working at a firm whose attorneys have represented tobacco companies and other corporate clients accused of egregious wrongdoing."<sup>25</sup>

Still, Lewis was not completely correct in saying that no other candidates had a plan for education. Lightfoot released a ten point education platform that pledged, among other things, to

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<sup>22</sup> Emily Stewart, "Chicago's mayoral race is about to make history," *Vox*, April 2, 2019, <https://www.vox.com/policy-and-politics/2019/4/2/18292142/chicago-mayor-elections-toni-preckwinkle-lori-lightfoot>.

<sup>23</sup> "CTU President Emerita Karen Lewis endorses Toni Preckwinkle for mayor," *Chicago Teachers Union*, February 22, 2019, <https://www.ctulocal1.org/posts/ctu-president-emerita-karen-lewis-endorses-toni-preckwinkle-for-mayor/>.

<sup>24</sup> David Heinzmann and Dan Hinkel, "Attacked as 'wealthy corporate lawyer,' Lightfoot defends legal work, progressive credentials," *Chicago Tribune*, March 21, 2019, <https://www.chicagotribune.com/politics/elections/ct-met-lori-lightfoot-mayer-brown-chicago-mayor-preckwinkle-20190321-story.html>.

<sup>25</sup> *Ibid.*



empower underperforming schools instead of closing them, to designate areas in the city to provide free early childhood care and education, to draft and introduce legislation in Springfield for an elected school board, to provide accessible public transportation to students, and to increase the number of teachers of color in the classrooms.<sup>26</sup> Upon her election in April 2019, many across the city were cautiously optimistic, finally freed from the unpopular Emanuel administration and hopeful for more responsive and understanding leadership, particularly as contract negotiations began between CPS and CTU. (As of April 2021, few of these policies have been implemented.)

Quickly, however, those hopeful expectations faltered as the union began to question the truthfulness of Lightfoot's campaign promises. Additionally, relationships between Lightfoot and CTU leadership got off to a rocky start. One teacher described the speed in which those relations soured, saying,

The whole summer I was like “We’re not going on strike. There’s no way. She has been mayor for 15 minutes. She does not want this to sully her name....” And they would have to give up so little in order to get us into classrooms in September, so why would she not just say yes to this? Give us librarians and we’ll call it a day! We were not asking for huge pay raises; we were not asking for stuff that they couldn’t afford. I was convinced to the point that the night we went home before the strike started I said, “See everyone tomorrow at 8:30 for school!” because I was really convinced that they were going to cave because what we were asking for was reasonable, it was necessary, and she built her name on the belief that equity is really important in our city and where do you start with equity besides the schools?<sup>27</sup>

This disappointment spread quickly as teachers began viewing Lightfoot as simply a continuation of Emanuel's time in office but with a new personality. And those personality shifts can deeply affect the nature of bargaining and therefore the policy outcomes within the contract.

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<sup>26</sup> “A Plan to Transform Chicago Public Schools,” *Lori Lightfoot for Chicago*, accessed April 27, 2019, [https://lightfootforchicago.com/wp-content/uploads/2019/01/2019\\_LEL\\_Education\\_Policy.pdf](https://lightfootforchicago.com/wp-content/uploads/2019/01/2019_LEL_Education_Policy.pdf).

<sup>27</sup> Laura Ferdinandt (CTU rank-and-file member), in conversation with the author, October 2020.

Before discussing the mayor's personal role in the bargaining process, it is important to note that those representing the city and the mayor in these negotiations also shifted quite drastically. With a new mayor came newly appointed CPS officials up and down the leadership ladder and new legal teams. Labor scholar Dr. Robert Bruno describes the new team, saying,

It seems like it was a much more funneled and controlled negotiation from the city side and that there was greater reliance on the two chief officers. Even CPS made a point of making this clear, that these were strong African American women who were products of the school system. And that was so different, I mean these were educators! Rahm's team had no educators.... But Lightfoot's, she had educators. And I mean CTU had pretty harmonious relationships with them, they didn't have anything negative to say about those individuals.<sup>28</sup>

This description of the players at the table provides a more optimistic view of the negotiating relationships. It appeared that union officials were able to work more effectively and closely with the bargaining team on the other side of the aisle, meaning that when talks consistently fell through, more of that blame was placed on Mayor Lightfoot as an individual.

This did not only affect relationships at the bargaining table. CTU teachers were often quick to dismiss the efforts of "Central Office," their way of referring to CPS administrators, but for certain members of the union the shifts in personnel during this period actually improved the relationship between CPS and CTU. One emphasized that the administrators now, largely, "are products of CPS themselves, they were teachers for decades, they were principals.... Now they're in charge of the district, and they're pushing initiatives that would have never, ever been pushed five years ago. CTU partners with them, and CTU takes the public approach of shedding light on the problems and then CPS behind the scenes tries to solve some of them."<sup>29</sup> This is not a universal view among teachers, certainly, but it does show a willingness to work with CPS officials while working with Mayor Lightfoot became more and more difficult. This shift may

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<sup>28</sup> Dr. Robert Bruno, in conversation with the author, November 2020.

<sup>29</sup> Laura Ferdinandt, in conversation with the author, October 2020.

point to a potential for the practice of social movement unionism to allow leaders to work more closely with appointed or career government officials while still rejecting elected leaders more publicly. This may weaken CTU's argument against the whole neoliberal system, however, and may indicate a tendency for leadership to work more closely with those in power over time. The union's overall public rhetoric, however, remained very opposed to city officials and, especially, the mayor.

Many union members emphasized the personal nature of the conflicts between CTU and Mayor Lightfoot. One high school teacher said,

I am aware that [Lori] said some very disparaging things to my [union president] when we were in the negotiations... And in a way, actually, I think Lori's actually almost worse than Rahm. Because with Rahm, we knew what we were getting. We knew he was a jerk and that he said horrible things to Karen but at the end of their meeting they wound up hugging, making some progress. But Lori, she was just cruel sometimes.<sup>30</sup>

This belief quickly spread throughout CTU membership during and after the strike. Since this strike, it would be difficult to find a teacher that genuinely supports Mayor Lightfoot, even among those who supported her election or felt hopeful at the beginning of the discussions. One teacher told the *New York Times*, "I voted for change, but what I got was a Rahm in sheep's clothing!"<sup>31</sup> Many felt insulted by Lightfoot's proposed solutions to these policy disagreements, saying that the city's contract offers were completely disconnected from Lightfoot's campaign rhetoric.<sup>32</sup> This discontentment may have played a role in solidifying CORE's strength in a time of leadership changes and inspiring further activism. Potter describes the difficulties of working with Lightfoot, saying:

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<sup>30</sup> John Boggs, in conversation with the author, November 2020.

<sup>31</sup> Monica Davey and Mitch Smith, "Chicago Teachers' Strike Tests Mayor on the Promises She Ran On," *New York Times*, October 18, 2019, <https://www.nytimes.com/2019/10/18/us/chicago-teacher-strike-lightfoot.html>.

<sup>32</sup> "Mayor Lightfoot Fears Chicago Teachers Union 'Determined To Strike At All Costs'; Union Calls Latest CPS Offer 'Frankly... Insulting'" *CBS Chicago*, October 11, 2019, <https://chicago.cbslocal.com/2019/10/11/mayor-lori-lightfoot-chicago-teachers-union-public-schools-negotiations-stalled/>.

I would say Rahm, particularly after we sobered him up from the strike, was just more flexible at figuring out how to resolve a problem. He didn't seem as bent out of shape or as ideological as Lightfoot can seem. But, you know, I think in some ways they're very similar. Neither liked us very much, both wanted to make it abundantly obvious that they had won their skirmishes with us. I would say in some strange ways that Lightfoot has been harder to negotiate with and we've won a lot more easily in terms of the time it took to win the things we've won. But it required more strike activities than it did with Rahm to get there, to meet our objectives.<sup>33</sup>

This inflexibility proved to be an early stumbling block for Lightfoot's mayoralty, and after the strike the major media outlets in the city characterized the negotiations as a failure for the mayor. The *Sun Times* claimed that "the animosity between the Chicago Teachers Union and Mayor Lori Lightfoot lingers in a way that could define the mayor's tenure. So could bargaining missteps by the rookie mayor that could make negotiating with police and fire unions infinitely more costly and difficult."<sup>34</sup>

The disapproval of Mayor Lightfoot's negotiating style and strategies likely helped CTU leadership rally their membership during the strike. This points to a potentially important aspect of successful social movement unionism: the ability to identify a common enemy that represents the threat of neoliberalism. If CTU was largely pleased with Lightfoot's negotiating style and strategies, it may have been more difficult to gather enough rank-and-file energy to pull off such a massive and lengthy strike and therefore garner enough political capital to achieve broader policy demands. While it is important for membership to understand the issues and the neoliberal policies at stake, it is certainly more effective when union leadership can use an individual as a representation of that "evil." Laura Ferdinandt, a rank-and-file teacher, sums up that sentiment effectively when describing the strike, saying,

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<sup>33</sup> Jackson Potter, in conversation with the author, November 2020.

<sup>34</sup> Fran Spielman, "Teachers strike is over, but Lightfoot faces political fallout," *Chicago Sun-Times*, October 31, 2019, <https://chicago.suntimes.com/city-hall/2019/10/31/20942625/teachers-strike-lightfoot-ctu-political-fallout-contract-talks-police-fire>.

When the strike started, I was like, “Okay this is going to be like one or two days.” Spoiler alert, it was not. It was awful, and it felt like intransigence on [Lightfoot’s] part and just this inability to say that she was wrong and this inability to say that she’s going to listen. So, it feels like she’s still in the same position as Rahm, not just an unawareness but a willful defiance of learning about what schools need. I still don’t understand why, but she wanted [that fight] and she lost... It’s like, do you want us to stay on these streets for weeks? Because we will! And we did! And we’ll prove it to you again! And I think that that’s what felt so insulting and so disappointing because if you claim to be for kids and especially if you claim to be for Black and brown kids in the city, then you have these conversations and you do something about it. You don’t just skirt around the issue and say that teachers are to blame.... I think we’ve hit a point in our city where the public recognizes that we cannot continue down the path that we’re on and so she’s going to keep losing the fight if she keeps bringing it up, and I don’t think she realizes that.<sup>35</sup>

With teachers quite united against the mayor only a few months after her taking office, the practice of social movement unionism relied on Lightfoot replacing Emanuel as the representation of the neoliberal attack against public education. This perception would be shared by many, not just the teachers, as community organizations and outside groups gathered to support CTU throughout the strike.

### *Coalition Building*

At the outset of the strike, CTU already had relatively high levels of citywide support for their actions, with 49% of voters either strongly or somewhat strongly supporting a strike and only 38% opposed. Of the CPS parents polled, over half supported the strike and said they were more likely to personally blame the mayor for causing the strike.<sup>36</sup> This parental support would prove to be important for broadening CTU’s coalition and increasing their political power, especially at a time when a new mayor was trying to solidify her leadership.

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<sup>35</sup> Laura Ferdinandt, in conversation with the author, October 2020.

<sup>36</sup> Nader Issa, “Poll: Chicagoans more in step with teachers than city over walkout,” *Chicago Sun-Times*, October 31, 2019, <https://chicago.suntimes.com/city-hall/2019/10/14/20914655/poll-chicagoans-support-teachers-strike-lightfoot-union-ctu-cps>.

Of course, not all parents were supportive of the strike. One parent, Brian Mullins, part of an organization called Black Community Collective, told *WTTW News*, “We started watching the Chicago Teachers Union bringing together black students and black parents and press conferences and bring teachers into black schools talking about their narrative.... It’s time for us to step up and take control of our own community and the narratives that are pushed into our communities.”<sup>37</sup> Still, many others embraced the teachers’ work. Parents 4 Teachers, a pro-CTU group that had organized in support of the union during previous contract negotiations, utilized the union’s rhetoric in their discussions of the strike, explicitly talking about the broader political issues that the practice of social movement unionism had brought to light over the past years. Julie Dworkin, a member of Parents 4 Teachers, showed this when she said, “We’re siphoning off a lot of money with these giant [Tax Increment Financing Districts] .... We could institute an employer head tax, which was something in place under Mayor Daley that Mayor Emanuel eliminated. There are ways to generate the revenue.”<sup>38</sup> Of course not all parents were discussing the details of tax policy, and many were simply faced with children at home during the workday, presenting a logistical challenge for the second time in less than a decade. This could be a potential downside for teachers’ unions practicing social movement unionism. While their public-facing nature allows them to effectively gain public attention, parents stuck home with children or left without options for child care could turn against the union if militant strikes become commonplace. Unless there are sustainable and effective alternatives for this problem, the usefulness of strikes for social movement unionism could also come with long-term challenges.

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<sup>37</sup> Evan Garcia, “Parents of CPS Students Sound Off on Teachers Strike,” *WTTW*, October 16, 2019, <https://news.wttw.com/2019/10/16/parents-cps-students-sound-teachers-strike>.

<sup>38</sup> *Ibid.*

In response to this natural frustration that all striking teachers' unions face, CTU membership worked during the strike to share the message of their demands with parents, trying to broaden their coalition of support in order to gain enough political capital to end the strike. Union delegate and high school teacher John Boggs described the logistics of parent outreach during the strike, saying,

In 2019 one of the most integral parts of the whole process was to go to people's doors and to explain why it was that we were doing what we were doing. And so, we would be in front, honking the horns and rallying at 7:00 in the morning until about 11:00. And then from 11 until 12 or 1 you would go to the neighborhoods around Bogan, and we would knock on the doors and we would give flyers to parents and really try to make sure they understood what it was we were striking on. We wanted them to understand, most importantly, that we need more social workers, and we need more school nurses. We wanted to let the parents know that we are doing this for YOU. We're not really arguing for more money, that was never the biggest thing that we were trying to get. The pay was actually quite fair, I feel like CPS pays their teachers very well. It's the other stuff that people just don't understand how hard it is.<sup>39</sup>

This face-to-face work of canvassing is something that fits well into a model of social movement unionism that relies on community organizing tactics. It also requires an engaged rank-and-file membership that is able to articulate their contract demands, pointing to a strength in the leadership category of social movement unionism.

The coalition in the streets in support of CTU looked quite similar to the crowds in 2015 and 2016, with unions across the city and community organizations joining together in support of the teachers.<sup>40</sup> This time, the unions representing CPS support staff joined CTU, striking in solidarity with them even though they had just come to a contract agreement with the city. In the days leading up to the strike, Chicago Park District employees also joined rallies.<sup>41</sup> The strike

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<sup>39</sup> John Boggs, in conversation with the author, November 2020.

<sup>40</sup> "Solidarity," *Chicago Teachers Union*, accessed April 27, 2021, <https://www.ctulocal1.org/movement/contract-campaigns/solidarity/>.

<sup>41</sup> Ravi Baichwal, Craig Wall, and Eric Horng, "Chicago Teachers Strike: CTU, SEIU hold downtown rally, march ahead of possible strike," *ABC 7 Chicago*, October 14, 2019, <https://abc7chicago.com/education/ctu-holds-downtown-rally-march-days-before-possible-strike-live-update/5617418/>.

also drew two presidential candidates, indicating the political nature of social movement unionism and its capacity to draw in support from specific ideological factions of the Democratic Party and the left. Both Senator Bernie Sanders and Senator Elizabeth Warren attended rallies, speaking about the importance of CTU's fight. Warren said in a tweet, "I stand shoulder to shoulder with the Chicago teachers making their voices heard to demand living wages, smaller class sizes, and all the things teachers need to do their jobs well."<sup>42</sup> Sanders's tweet in support of CTU and SEIU noted that, "it's unconscionable for wealthy corporations to receive massive tax breaks while children go without school nurses and librarians."<sup>43</sup> Both candidates had large followings at this point in the race, and this public support from potential presidential nominees shows the broad effects of coalition building as an essential practice of social movement unionism. While social movement unionism often relies on rejecting elected officials, the left-leaning nature of these candidates, who often articulated critiques of neoliberalism, only expanded CTU's political capital among activists. It is notable that after years of grassroots organizing, public support from activists and regular citizens alike had made support for CTU a politically popular issue, one that progressive candidates would use to garner support in Illinois and from teachers across the country.

Even Joe Biden, whom Karen Lewis and CTU protested in 2012 for the Obama Administration's Race to the Top program, commended the "bravery" of the teachers during this strike.<sup>44</sup> This is a culmination of the bottom-up work of CTU's social movement unionism and

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<sup>42</sup> "Bernie Sanders Makes Appearance at Chicago Teachers Union Rally Tuesday," *NBC Chicago*, September 24, 2019, <https://www.nbcchicago.com/news/local/sanders-makes-appearance-at-chicago-teachers-union-rally-tuesday/153205/>.

<sup>43</sup> "Sanders, Warren Back Chicago Teachers Union Amid Contract Negotiations," *NBC Chicago*, September 23, 2019, <https://www.nbcchicago.com/news/local/chicago-teachers-union-bernie-sanders-elizabeth-warren/153359/>.

<sup>44</sup> "Biden Calls Attention to Chicago Teachers' Strike At New York Teacher Union Day Address," *CBS Chicago*, October 20, 2019, <https://chicago.cbslocal.com/2019/10/20/biden-calls-attention-to-chicago-teachers-strike-at-new-york-teacher-union-day-address/>.



presents a new question for relationship-building as a strategy. When the union's coalition has become so politically powerful that they gain the support of politicians they have opposed, how must leadership contend with those figures in order to continue to practice social movement unionism and avoid creating close ties with the elite? CTU leadership certainly was not working closely with Biden during the strike, but it still is an important question to ponder for the future, as now-President Biden finds himself on the opposite side as CTU in the question of reopening schools -- an issue that will be discussed further in Chapter 5. This relationship between activist coalitions and decision makers will continue to shift as the practice of social movement unionism continues, but at least during this strike period, it is clear that CTU had garnered enough grassroots support to wield vast political power in the city and even in the country.

## **Policy**

The 2019 strike represented a possibility for real, substantive contract wins. The city was in a better financial position, CTU had amassed even more political power, and Mayor Lightfoot needed to solidify her role as mayor. The resulting contract is hailed by many scholars and union members as a massive success. This section will, like previous chapters, describe the contract-specific demands and the broader demands, beginning with broader demands, though there is more overlap between the two categories than in previous negotiating periods. While previous chapters began by discussing the contract-specific demands, the results of this contract include some elements of the broader demands despite the continuation of restrictive labor laws. For this reason, the context of the broader demands is important to understand before looking at the contract itself.

### *Broader Demands*

If 2012 began a conversation about inequity and injustice, 2019 represented a culmination of that conversation, where most teachers were united in their understanding of social justice and in their rejection of neoliberal policies. Even before the strike began, Mayor Lightfoot expressed resentment at the union's focus and insistence on supposedly unrelated issues. In particular, the union's focus on community-wide affordable housing, an explicit element in their public demands, posed a challenge for Lightfoot.<sup>45</sup> Housing prices are not within the typical "bread and butter" issues of a union, but CTU saw their commitment to this issue not as a departure from their other demands but as a logical piece of their broader drive for an equitable and just city. With 16,451 homeless Chicago Public School students at the time of negotiations, CTU leadership viewed affordable housing as an essential part of making schools a place where students succeed.<sup>46</sup>

The example of affordable housing speaks to a larger pattern of teachers demanding solutions for other systemic issues across the city. After years of participating in social movement unionism and educating each other about neoliberalism and community experiences, it seemed only natural that these seemingly unrelated issues would be integral to the success of teachers, schools, and students. One teacher, Laura Ferdinandt, said,

As much as the District is doing around equity (we have a whole office dedicated to equity), we still have teachers who don't have the tools that they need, and so kids are still suffering, kids are still struggling daily with the issues that they face outside of school! And until we can fix that, I don't think that we see a public education that works for kids. I think that fundamentally that is the charge of CTU and CPS and all of the big districts in our country, it's to figure that out and bring resources into the neighborhoods so kids don't suffer the way that they suffer right now and so families have resources to get themselves out of this cycle of trauma and until that happens, we're just... what's that

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<sup>45</sup> Nader Issa, "As strike Looms, CTU still pushing affordable housing instead of focusing on key contract issues, Lightfoot says," October 8, 2019, <https://chicago.suntimes.com/2019/10/8/20905834/cps-teachers-strike-ctu-union-public-schools-affordable-housing>.

<sup>46</sup> Ibid.

saying? You keep pulling the babies out of the river, but you never stop to look upstream at who is throwing them in the river to begin with. You never solve the problem; you're just putting a Band-Aid on it.<sup>47</sup>

At this point, teachers could receive great skills and plenty of resources to help students learn from a contract, but as long as their students were going through trauma at home, they would never be able to learn in the same way as students in stable situations, which only continues to exacerbate systemic inequities. This is a strong example of CTU's commitment to social movement unionism and rejection of neoliberalism.

This strike, as a culmination of years of organizing and learning, also felt exhausting for many union members. Their broader demands seemed even more obvious to them, especially as the ideology of rejecting neoliberalism, supporting public education, and improving the lives of their students had expanded to become more politically popular. After fifteen days of rallying in the streets, the longest strike in decades, teachers were tired.<sup>48</sup> They were tired physically, of course, from canvassing in their neighborhoods and marching all day long, but they were also losing patience. One teacher, Tonya Harbottle, described her exhausted frustration, saying,

I think people don't understand that we feel like we literally have to fight for every single thing. When I feel like a child has a mental illness, it should be a given that they can get the services they need, right? Or a child who's living with trauma should just be able to go to their school counselor... to get those services. And the fact that our kids literally don't have that.... You know, schools have hundreds, even up to 1,000 kids who have one part time social worker, in a neighborhood where trauma happens day after day after day. To me, that's nuts. And I don't understand. I don't know if people don't see it because they live in neighborhoods where they don't have to see it. But it feels obvious to me. And apparently, it's not.... So, I'm grateful that the union recognizes that it's about more than just what's in our contract that that is important. But the reason we all became teachers was for students so it feels natural to me, that we and as an extension or union leadership would advocate and fight for what our kids need.<sup>49</sup>

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<sup>47</sup> Laura Ferdinandt, in conversation with the author, October 2020.

<sup>48</sup> Mitch Smith and Monica Davey, "Chicago Teachers' Strike, Longest in Decades, Ends," *New York Times*, October 31, 2020, <https://www.nytimes.com/2019/10/31/us/chicago-cps-teachers-strike.html>.

<sup>49</sup> Tonya Harbottle (CTU rank-and-file member), in conversation with the author, November 2020.

This sentiment was echoed in other interviews with other teachers, showing that the anger described by Dr. Robert Bruno was palpable at an individual level as well. The message of systemic change is an effective one, but it can also frustrate organizers who have to continuously work to achieve what they see as the baseline. There is a hopefulness in imagining a new world through social movement unionism, but it can also spark frustration, exhaustion, and pessimism when members face steep barriers to success. Luckily for these frustrated members, the 2019 contract would make significant strides towards this imagined future, perhaps assuaging these frustrations for the time being.

### *Contract-Based Demands*

CTU's public demands for this contract were not as extensive and detailed as they were in the 2015-2016 negotiating period, perhaps an indication of the different leadership style of President Sharkey. These demands would not come until later in the negotiation process, too, which would be a point of criticism for Mayor Lightfoot, who said that CTU needed to present more detailed, written counterproposals to the district's offers.<sup>50</sup> Perhaps this was because CTU leadership viewed their broader demands as more applicable and achievable than in previous negotiations, so they kept to broader messaging. Still, it makes the analysis of social movement unionism more difficult without the detailed policies of the previous negotiations and perhaps makes militant organizing more difficult as leadership does not have as clear of demands that must be met before a strike can end.

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<sup>50</sup> "Mayor Lori Lightfoot Demands Written Contract Terms from Chicago Teachers Union; 'We Can't Bargain Against Ourselves,'" *CBS Chicago*, October 7, 2019, <https://chicago.cbslocal.com/2019/10/07/mayor-lori-lightfoot-chicago-public-schools-teachers-union-contract-demands/>.

Regardless, CTU did present a list of demands that specifically centered on the hiring of support staff including nurses, librarians, and counselors. Demands also sought to make the lives of Paraprofessionals and School-Related Personnel (PSRPs) more equitable, including pay raises and more hiring opportunities. Within many of these demands is wording that incorporates CTU's broader vision, such as tying the hiring of PSRPs to increasing equity for women and people of color.<sup>51</sup> The very fact that CTU was focusing on PSRPs, Teacher Assistants, nurses, librarians, counselors, and other support staff shows an interesting side of social movement unionism. Not only was union leadership not asking for increases in teacher salaries, but they actually were advocating for others within the school system, including people who were not yet licensed professionals, like parents who were interested in becoming teachers. This indicates that CTU's practice of social movement unionism now sought to expand the public sphere and public school system in particular, moving from the defensive nature of the previous two negotiations to a more offensive strategy that wanted to increase the number of professionals within public schools.

The union's years-long departure from focusing solely on teacher wages and immediate working conditions resulted in a contract that hired many new PSRPs, continued the moratorium on charter schools, and even agreed to stop privatizing or contracting out positions, which is a big step in combating neoliberalism. Figure 4.1, below, outlines the explicit demands from CTU and compares them with the actual results in the contract. The articles and clauses referenced are noted in the right-hand column.

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<sup>51</sup> "Where we stand at the bargaining table with CPS and Mayor Lightfoot," *Chicago Teachers Union*, accessed April 27, 2021, <https://www.ctulocal1.org/wp-content/uploads/2019/08/CTU-CPS-Bargaining-Positions-Comparison.pdf>.

**Figure 4.1: CTU Contract Demands and Results for 2019 Labor Agreement**

CTU Demands <sup>52</sup>	Contract Result <sup>53</sup>
Set a maximum class size and hire TAs/provide stipends in the event class size caps are exceeded.	Redefined maximum class sizes and created a 12 member Joint Class Size Assessment Council, which will target relief towards Priority Schools and enforce class sizes (28-2) (28-3). Provides \$35 million per year to reduce class sizes (28-5).
Hire social workers, counselors, nurses, and other clinicians at “nationally recommended ratios”	Agrees to hire enough qualified social workers and nurses so that one can be assigned to each school (STAFFING). Funds at \$2 million a pipeline program to support PSRP nurses become Certified School Nurses (20-6.8).
Hire a full-time librarian and restorative justice coordinator for every school.	Affirmed commitment to developing restorative justice practices (30-9.1).
Reduce case workloads for clinicians and counselors.	Ensured clinicians access to a confidential and private space in the school for sessions. (20-1.7) Counselors can only be given duties that are aligned with the recommendations of the American School counselor Association (20-2.6). Ensures counselors, clinicians, and special educators do not have to perform case management (20-9). Explicitly reduces workloads and staff-to-student ratio for psychologists and therapists (20).
Salary raises “including grade increase plus steps and lanes for Paraprofessionals and School-Related Personnel (PSRPs) to address equity for women, Black, Latinx workers.”	Adds funding to support PSRPs and other teacher candidates in becoming classroom teaching, including ensuring financial support and health insurance for these candidates. (9-21) Provides an average PSRP pay increase of

<sup>52</sup> Ibid.

<sup>53</sup> “2019-2024 Tentative Agreement: Agreement Between the Board of Education of the City of Chicago and the Chicago Teachers Union, Local No. 1, American Federation of Teachers, AFL-CIO,” October 2019.

	nearly 40% during the contract period (36)
30 minutes of preparatory time for elementary school teachers	Slightly more time (2 hours minimum) for kindergarten teachers during their first quarter report card period. (17-3)
Hire 1,000 additional TAs and “other measures to achieve equity for women, Black, and Latinx educators”	Establish a pool of substitute Teacher Assistants to work in early childhood classrooms (17-6).
Expand from 20 to 75 schools designated “Sustainable Community Schools.”	Includes stable funding and commitment for the 20 schools but allows the number of schools and schools to change through the Task Force with the same funding. (12-2)
“Declare support for the expansion of affordable housing for educators, students, and parents.”	Funds new full-time positions in schools with 75 or more students without stable homes (46-1.1).
Continued moratorium on charter school expansion.	Commits to a net zero increase in authorized charter school throughout the contract period (Side Letter).
<i>Other Notable Contract Changes:</i>	Expanded discrimination protections to include ethnicity, gender, gender identity or expression, religion, immigration status, and more.
	Expedited grievance and arbitration procedure (3-8.3)
	Will stop contracting and privatizing teacher clinicians, teacher assistants, or librarians and phase out contract workers (20-1.13)
	Expands bereavement days to include domestic partner and spouse’s parents (33-4).
	Ensures CPS will be a Sanctuary School District, requiring a warrant for ICE agents to enter schools (46-5)

Of course, this chart does not represent all the changes in the 2019 contract. Many other demands, including teacher evaluations and professional development, made it into the contract

as well. The result was a contract that most teachers, union officials, and scholars believe was a big win for CTU.<sup>54</sup> The district agreed not to expand charter school authorization, committed to hiring more PSRPs, reduced the caseload for counselors and teachers, and granted more money to reduce class sizes. These are all successes at a policy level for the practice of social movement unionism, especially since many of these demands were explicitly linked to combating neoliberalism and expanding the public sphere.

Still, there were parts of the contract that left teachers disappointed, as any contract will. This is a challenge for social movement unionism, as it continuously raises the standards and expectations for members and then must deal with the results of a bitter contract negotiation. At some point, it is necessary to shake hands with those on the other side of the table and end the strike, even when certain demands are not met. Of particular concern for the teachers were the days of school missed during the strike. Teachers want to be able to get through the curriculum with their students and also rely on payment for every day of the school year, especially with increased housing prices. Teachers hoped that they would be able to make up the fifteen missed days at the end of the school year, like they would make up a snow day, but Mayor Lightfoot would not agree. With an agreed-upon contract except for that final detail, it became difficult to justify striking for more days over this issue, especially because it might not be a politically popular one. Still, this indicates a prioritization of broader systemic issues over the “bread-and-butter” ones like wages. Teachers would lose eleven days of pay, which would be difficult in a city with a high cost of living like Chicago. One teacher spoke of this experience, saying,

I think overall, there were some people who were kind of bitter and loud about not getting all those days back. But I think most people realize, like, when you go on strike, that's the risk you take, like, right, not for nothing. So yes, if we've been out three or four days, we probably would have easily gotten those days back. But we were out of time.

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<sup>54</sup> Dr. Robert Bruno, in conversation with the author, November 2020.



And it was actually a really hard fought battle. And so yeah, there's gonna be some losses and some sacrifice we make on our end, too.<sup>55</sup>

These difficult demands that were not included in the final contract, including more preparation time for elementary school teachers and the expansion of Sustainable Community Schools, would be a disappointment for those directly impacted. CORE co-founder Jackson Potter noted that the decision about what issues could be left at the bargaining table often comes down to political capital. He noted,

There's other things that [we can achieve] through compromise, through creative thinking, through pressure, like homeless students getting additional resources. We were lampooned by Lori and it became the most compelling national story of why this strike was for the common good. So, she just completely collapsed on her opposition once that was obvious. So, we didn't expect that to happen, and it did.<sup>56</sup>

In this way, social movement unionism's reliance on coalition-building in order to have political power will always prioritize some issues over others. The more the public and those attending rallies care about an issue, the more likely it is to become politically possible to achieve success at the bargaining table. This may present an issue for unions that seek to prioritize very nuanced or niche issues. On the other hand, the necessity for social movement unionism to tie even their most specific priorities into a broader message for change can help educate residents and increase public support for seemingly complex issues, like Tax Incremental Financing (TIF). TIF Districts might not have become such a polarizing issue without CTU's integration of the policy into a larger message. The balance in issue prioritization is something that CTU and other organizations practicing social movement unionism will have to address in future negotiating periods.

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<sup>55</sup> Sherry Nelson (CTU rank-and-file member), in conversation with the author, November 2020.

<sup>56</sup> Jackson Potter, in conversation with the author, November 2020.

## **Conclusion**

When reflecting on the strike, CTU leadership and membership often express pride in their organizing and in the resulting contract. They point to the addition of PSRPs, renewed commitments for previously agreed-upon projects, and better enforcement of class size limits. They also express frustration, especially at Mayor Lightfoot's behavior and at the length of time they had to be in the streets to achieve these wins. It is difficult to find a teacher with a positive view of Mayor Lightfoot now, which presents a challenge for future negotiations. Despite the difficult relationship between CTU leaders and Mayor Lightfoot, the final contract should be considered a success for both parties, and a success for the future of social movement unionism. After years of working to organize a movement, CORE leadership finally achieved many of the proposals they were founded on and created a citywide coalition of community organizations, activists, and empowered teachers. These teachers, while able to criticize certain elements of the final contract or even of union leadership, were still very supportive of the union and CORE as they returned to the classrooms. Less than a year later, however, schools would be closed again, this time because of a pandemic that even more clearly exposed the systemic inequities present in the city.

## 5. Conclusion

*CTU sees the political economy of Chicago, particularly ever since [the rise of] neoliberal politics in the 80s, as an attack on workers and a power grab by the elite and wealthy. And they see it playing out in schools. Schools are the bedrock of democracy, which is why Karen [Lewis] said it's a fight for the soul of public education!  
And when it's a fight for the soul, you're going to fight pretty hard.*

- Dr. Robert Bruno<sup>1</sup>

This work sought to contextualize and answer an emerging question in labor scholarship: to what extent can social movement unionism resist the politics of neoliberalism, specifically within schools? While one case study cannot comprehensively answer this question, the study of one union over the course of a decade shows that under the right political conditions social movement unionism over the course of multiple contract negotiations can achieve significant policies that combat neoliberalism and shift the local political context towards more progressive rhetoric. To conclude this argument, this chapter takes three approaches. First, it provides an overview of the central arguments and findings for each period discussed. The analytical framework for this project addressed the central research question by looking at the extent of grassroots-oriented leadership, broad coalition-building through relationships, and policy demands beyond the traditional scope of business unionism. Additional quotes contextualize the three negotiating periods and contribute to an understanding of the Caucus of Rank and File Educators' (CORE) leadership. This overview seeks to show that each of these individual negotiations are continuations of CORE's organizing, "one drama with multiple acts."<sup>2</sup>

Second, this chapter addresses the complicated and important actions taken by the Chicago Teachers Union (CTU) since the 2019 strike. This includes responding to protests for

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<sup>1</sup> Dr. Robert Bruno (labor scholar, University of Illinois), in conversation with the author, November 2020.

<sup>2</sup> Ibid.

racial justice in the summer of 2020 and the still-evolving debate about reopening schools during the coronavirus pandemic. This includes some preliminary analysis of the strike CTU almost participated in at the end of 2020 and the eventual re-opening in early 2021. This time period has shown some signs of decline for CTU's power and political capital, raising questions about the eventual demobilization of unions practicing social movement unionism.

Finally, this chapter draws conclusions about social movement unionism's capacity to resist neoliberalism, which is the central question of this work. It addresses the possibilities for future research while pointing out the intricacies and possible generalizations of CTU's case for other unions. While CTU ultimately achieved many successes over the past decade, it is important to recognize that social movement unionism may not be an easily transferable practice to other locations, political climates, or job sectors. The overall wins for CTU throughout the decade may, however, provide a roadmap for unions in a position to successfully organize. Under the right circumstances, activating the union with a grassroots leadership, building a city-wide coalition, and framing policy demands in a broader context can allow for a period of increased rank-and-file commitment, political capital, and contract wins.

### **Overview of Argument & Findings**

The framework used to analyze CTU's practice of social movement unionism can also identify the notable elements of each negotiating period. While each period included important successes and challenges for each of the three categories for analysis (leadership, relationships, and policy), each period can be used to highlight one category in particular.

In 2012, the rise of CORE's leadership and the activation of CTU membership received more strategic focus and more results in comparison to coalition building or policy. This follows

the analytical framework and affirms that strong internal organizing is required in order to achieve external results. The 2012 strike represented the height of Karen Lewis's charismatic leadership style, before she had to step back from CTU activities for health reasons. She drew thousands of activists and members to rallies, articulated the union's vision on the evening news, and energized her membership to take a more active role in their union. Even CORE's election was a massive victory for social movement unionism. Additionally, the strike allowed the rank-and-file membership to become even more dedicated to the union and its fight for justice. It is difficult to say whether CORE leadership shifted the culture of the membership or if they represented a membership that had already become more radical and militant, but their election broadened the possibilities for contract negotiations and began a decade-long process of organizing. The question of whether leadership shifted internal culture, or the existing culture led to the change in leadership is one that deserves further study and could provide important insight into the political context that creates successful social movement unionism.

Aside from their strategic focus on internal leadership and organizing, CTU made some progress to build coalitions and demand policies in line with successful social movement unionism in 2012. They began building relationships with community organizations and even charter school teachers, though these were not yet solidified into longer-term coalitions. They drew support from parents across the city and teachers' unions across the country. Still, they faced an uphill battle to achieve a successful contract that addressed more than just wages and immediate working conditions. Most of their demands were defensive, trying to avoid further school closures or the extension of the school day without expanded benefits. They also did not yet have the political capital from a broad coalition, meaning their rejection of Democratic Party leaders may have hurt their bargaining power. It can be expected that unions beginning to

practice social movement unionism will likely not achieve much in their first contract negotiations, especially since this mobilization will often happen because of a threat that requires defensive strategies. Additionally, unions will often not achieve the level political capital necessary for contractual wins until coalitions are built and strengthened.

In the 2015-2016 negotiating period, CTU had to be even more defensive, pushing back against a recently re-elected Mayor Emanuel in the midst of a fiscal crisis that left the Chicago Public Schools' (CPS) budget with a massive deficit. As CORE leadership and CTU members mourned the news that their President, Karen Lewis, had been diagnosed with aggressive brain cancer, they also knew that their policy demands would have to be targeted and smaller than what they truly wanted. Despite the restrictive political and economic climate, the resulting contract still included aspects that went beyond wages and basic working conditions, such as a moratorium on charter school expansion and the creation of 20 Sustainable Community Schools.<sup>3</sup> Still, the contract ended pension pick-ups for newly hired teachers and did not address many of the broader issues CTU desired. This emphasizes the argument that “successful” social movement unionism may still fall short of what progressives want, but having a nuanced understanding of contract can account for the elements beyond the union’s control.

During this period, CTU really focused on expanding their coalition of activists and organizations, making up some of their lost political capital as relationships with Mayor Emanuel continued to sour. With the unionization of charter schools and the eventual merger with the CTU itself, teachers across the city became more united around a common goal. Additionally, the April 1st Day of Action drew support and assistance from organizations who had now worked with CORE leadership for multiple years. Black Lives Matter activists, the Fight for 15

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<sup>3</sup> “2019-2024 Tentative Agreement,” October 2019.

campaign, and neighborhood organizations all showed up for CTU during this fight because teachers had incorporated their values and issues into their overall messaging and demands. This represents an essential tipping point for social movement unionism where activists have built a broad enough coalition to overcome the political capital lost by breaking ties with business and political elites. Finding this moment, where the scales start to tip in the favor of the union, is important for predicting future contract wins and power.

In 2019, teachers finally found themselves in a position to demand even more during contract negotiations. Despite having new union leadership and a new mayor, CTU continued their organizing efforts and took to the streets for an even longer strike than the one in 2012. The union's frustration about the disconnect between Mayor Lightfoot's campaign rhetoric and her stubborn negotiating style meant that CTU's relationship with the mayor quickly deteriorated. Still, the union had a coalition of support, including from prominent presidential candidates, so their bargaining power and the city's relatively stable financial state allowed for some major contract wins for CTU. The resulting contract contained enforceable class size limits, resources to hire support staff and nurses, and the end of contract workers in the school district. This contract, especially when considered alongside the other wins in the previous two negotiating periods, successfully halted some of the neoliberal policies the union feared most. While not every union will need three negotiating periods to achieve a contract widely perceived as successful in combating neoliberal policies, it is important to view this as a culmination of the previous negotiating periods and organizing efforts.

It is easy to view these three negotiations as a linear journey to success for social movement unionism and union memberships. However, it is also important to note the times that CTU was challenged or failed to achieve their goals, and the 2019 contract, while many steps in

the right direction for the leadership, did not address all their concerns. Their students still faced trauma at home and teachers were still pressed to find enough resources for their work. Social movement unionism is not a perfect solution to the onslaught of neoliberalism, especially in anti-union political climates. While CTU may see future years of successful social movement unionism, including more contract wins, at some point their power will fade and systemic issues will likely remain. To celebrate social movement unionism as the main solution needed to combat neoliberalism ignores the reality of union organizing and the sometimes insurmountable barriers to success. Today, Chicago remains mired in racial injustice, political corruption, and neoliberalism. In the years following this contract, CTU would find out just how hard it can be to fight for policies while they are less politically popular or amid other crises.

### **CTU in the Age of COVID-19**

After the 2019 strike, many teachers continued to organize in support of CORE's policies. One teacher described the membership's commitment to this fight, saying,

I think the goal of [the 2019 strike] was the broader conversation, recognizing that it's really hard to help kids if you don't have nurses in schools, if you don't have social workers, if you don't have libraries, if you have police officers inside of a school and you don't have any mental health workers inside of a school. And I think that that conversation hasn't really ever stopped since 2019, and I think that the political climate in general is fueling that, but I think also CPS is... And so, it doesn't feel like this conversation is getting very far and it doesn't feel like this conversation is going anywhere, we're going to be having these same conversations five years from now.<sup>4</sup>

This frustration was palpable for many teachers; even though they had such a successful contract negotiation and strike, they were still dealing with many of the same issues as before. The cycle of trauma and the systemic inequities present in schools cannot disappear overnight or even over

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<sup>4</sup> Laura Ferdinandt (CTU rank-and-file member), in conversation with the author, October 2020.



one contract negotiation. Even as CORE members and many teachers continued to organize and support the union's new direction, there were others who were tired of CTU's constant centering of broader political goals. Some wished that union leadership would return to some of the "bread and butter" issues and give greater focus to elements of unionism that directly impact the classroom. However, none of these internal discussions would be resolved. In March 2020, only a few short months after teachers returned to school in November 2019, all Chicago schools closed their buildings and went online to prevent the spread of the coronavirus. This happened all across the country, of course, but for Chicago students this change meant increased inequities for students who had already seen their in-person learning shortened by almost two weeks because of the strike. Many students were left without the technology, internet, or adult help necessary to complete the school year. Officials reported that nearly one third of students did not have access to adequate internet access, leaving the city's most vulnerable students behind in the rollout of online learning.<sup>5</sup> Even before the decision to close schools, CTU was already at odds with CPS on this issue, criticizing CPS' insistence on keeping schools open and on downplaying the number of staff members testing positive for the virus throughout March 2020.<sup>6</sup> CTU was thrown into a deadly and deeply politicized crisis that may change the way their leadership will govern for years to come. This period will be important for future research to understand the complexity and cyclical nature of social movement unionism, though at this point it is impossible to fully discern the implications of the pandemic on the union and on organizing more broadly.

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<sup>5</sup> Sophie Sherry and Jemal R. Brinson, "From teachers strike to total shutdown: A timeline of Chicago Public Schools' very strange year," *Chicago Tribune*, June 19, 2020, <https://www.chicagotribune.com/news/ct-chicago-public-schools-year-strike-coronavirus-20200618-ck3r4d4ogvc5shahexsb6d7a6p4-list.html>.

<sup>6</sup> Ibid.

By the end of May 2020, CPS reported that teachers across the city had had no contact with over 2,000 students since the beginning of the pandemic.<sup>7</sup> CTU's focus on equity and justice certainly became even more palpable, but the ways in which teachers, administrators, and parents wanted to mitigate these inequities varied widely. CPS decided that no student could earn a failing grade or a grade lower than what they had before the pandemic, which received criticism from many as too lenient, including from teachers who said it caused their students to stop engaging at all in school.<sup>8</sup> Still, others said that the district needed to be doing more, including many in CORE and some of the more militant members of the union. By the end of the school year, especially with the addition of city-wide Black Lives Matter protests over the murder of George Floyd, the union looked much more divided than it had been in the fall.

Despite these crises, CTU leadership continued to practice similar social movement unionism, celebrating when a new charter school voted to unionize and join CTU and holding rallies to increase access to affordable housing.<sup>9</sup> As the summer went on, however, CTU became more focused on Mayor Lightfoot's desire to open schools in September for at least some form of in-person learning. Much of the reasoning for this push was to increase equity and allow the students who have fallen most behind access to targeted resources, something that followed CTU's social justice rhetoric quite closely. The very fact that elected officials and Chicago Public Schools used language based on equity and justice indicates success for the union. Power holders have recognized that it is politically advantageous to mirror the union's rhetoric, indicating political capital and success for social movement unionism. Still, it is important for

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<sup>7</sup> Ibid.

<sup>8</sup> John Boggs (CTU delegate), in conversation with the author, November 2020.

<sup>9</sup> CTU Communications, "EPIC charter educators vote overwhelmingly to unionize, join CTU," *Chicago Teachers Union*, July 1, 2020, <https://www.ctulocal1.org/posts/epic-charter-unionize-ctu/>; Chicago Area Fair Housing Alliance, "Chicago Housing Justice League Action Alert!" *Chicago Teachers Union*, July 8, 2020, <https://www.ctulocal1.org/posts/chicago-housing-justice-league-action-alert/>.

unions to continue articulating their message despite difficulties raised by power holders being seemingly on the same side as the union. This may be difficult, however, as it becomes more difficult to articulate a clear “enemy.”

Union officials would play a central role in negotiating what is not a typical contract, but instead a mutually agreed-upon reopening plan with CPS and, by extension, the mayor. CTU leadership immediately began to push back against the idea of reopening, and the opinions of their membership reflected that strategy. In July, a CTU-conducted member poll showed that nearly 70% of rank-and-file members did not want medically compromised staff to be forced to return in-person in the fall.<sup>10</sup> While the wording of the questions for this poll were quite leading, it does indicate that CTU teachers were willing to express these views in line with their leadership.

The rhetorical choices of leadership in responding to Mayor Lightfoot’s initial plans to reopen schools follow similar patterns to their past contract demands, emphasizing a rejection of neoliberalism and a focus on social justice. In one statement from the union, officials argued, “Our Black and Latinx neighborhoods contain a disproportionate number of frontline workers at greater risk of COVID-19, from bus drivers and nursing assistants to grocery store clerks and janitors. Insisting that these families send their students into classrooms that intensify the risk of virus transmission as the pandemic spikes is not just risky. It’s morally reprehensible.”<sup>11</sup> Here, CTU clearly takes an intersectional approach to their demands, and this rhetoric is echoed in Mayor Lightfoot’s public statements on the topic, perhaps indicating political benefits for

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<sup>10</sup> CTU Communications, “CTU member-wide survey results on reopening of Chicago’s public schools,” *Chicago Teachers Union*, July 9, 2020, <https://www.ctulocal1.org/posts/ctu-member-wide-survey-results-on-reopening-of-chicagos-public-schools/>.

<sup>11</sup> “We cannot allow the safety of our students and school communities to be undermined,” *Chicago Teachers Union*, July 24, 2020, <https://www.ctulocal1.org/posts/we-cannot-allow-trump-and-lightfoot-to-undermine-the-safety-of-our-students-and-school-communities/>.

adhering to this strategy of centering the most marginalized communities, as CTU had been doing throughout their practice of social movement unionism. This turned into a back-and-forth argument between the union and CPS on who actually wanted equity, with CTU claiming CPS refused to commit the resources to achieve equity and instead saying their actions would “replicate failed neo-liberal education policies of the past.”<sup>12</sup>

As the 2020-2021 school year began remotely, CPS continued planning an eventual re-opening of schools. The union organized car caravans and other forms of socially-distant protests as tensions at the bargaining table only grew. The union became more militant in its insistence that staff remain remote, even filing an unfair labor practice and grievance against CPS for requiring clerks and other staff to return to buildings without adequate safety precautions or resources.<sup>13</sup> CTU eventually won that fight, after reports of multiple clerks’ families falling ill, with the arbitrator ruling that “subjecting these employees to increased risk of COVID-19 infection for work that can be performed remotely does not fulfill CPS’ contractual promise that its employees work in ‘safe and healthful conditions.’”<sup>14</sup>

By November, CPS officials were no longer willing to bargain with the union on reopening, setting a date for preschool teachers to return to classrooms. This led to another unfair labor practice charge by the union. Mayor Lightfoot eventually announced that she intended schools to reopen in January, leading to more arbitration, mediation, and COVID-safe car caravans in protest. In the days before schools were set to reopen, teachers refused to enter their

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<sup>12</sup> “CPS must budget for equity, not just talk about equity,” *Chicago Teachers Union*, August 10, 2020, <https://www.ctulocal1.org/posts/cps-must-budget-for-equity-not-just-talk-about-equity/>.

<sup>13</sup> Thad Goodchild, “School clerks’ unfair labor practice charge will go to trial,” *Chicago Teachers Union*, September 10, 2020, <https://www.ctulocal1.org/posts/school-clerks-unfair-labor-practice-charge-will-go-to-trial/>.

<sup>14</sup> “CTU wins legal battle to protect workers in unsafe buildings as two new schools report COVID cases -- and one tragic death,” *Chicago Teachers Union*, October 2, 2020, <https://www.ctulocal1.org/posts/ctu-wins-legal-battle-to-protect-workers-in-unsafe-buildings-as-two-new-schools-report-covid-cases-and-one-tragic-death/>.

buildings, eventually being locked out of their school accounts and thus unable to communicate with students or parents.<sup>15</sup> CPS argued that teachers' refusal to return to classes amounted to an illegal strike, even opening misconduct cases against over one hundred teachers, while CTU characterized CPS' actions as illegitimate punishment for teachers just trying to stay safe.<sup>16</sup>

As of this writing, CTU and CPS have finally reached a deal to reopen elementary and middle schools by early March.<sup>17</sup> Teachers support the agreement for the most part, but many activist members on Twitter feel that CTU should not have agreed to in-person learning until all teachers and students had been vaccinated. Others felt that teachers should have been more willing to return to in-person learning earlier. This has brought CTU once again into the national spotlight as a proxy for the larger discussion on reopening schools and drawing criticism even from mainstream Democrats who felt that the country now had the knowledge to safely return to classrooms. Mayor Lightfoot echoed this frustration and characterized the fight as unnecessarily political, saying,

We have relationships with over 40 [organized labor] units. We have labor peace with almost every single one, except for two. The Fraternal Order of Police, which has a lot of right-wing Trump aspirations, and the Chicago Teachers Union. When you have unions that have other aspirations beyond being a union, and maybe being something akin to a political party, then there's always going to be conflict... I think, ultimately, they'd like to take over not only Chicago Public Schools, but take over running the city government.<sup>18</sup>

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<sup>15</sup> "CPS Will Lock Out Teachers Who Don't Report to Schools Monday," *NBC Chicago*, February 5, 2021, <https://www.nbcchicago.com/news/local/cps-will-halt-online-access-for-teachers-who-dont-report-to-schools-monday/2431124/>.

<sup>16</sup> Andrea Parker and Jim Staros, hosts, Jesse Sharkey and Rebecca Martinez, interviewees, "Commit to Safety," CTU Speaks! (podcast), February 26, 2021, accessed April 28, 2021, <https://soundcloud.com/user-429973650/commit-to-safety>.

<sup>17</sup> Dana Goldstein, "Chicago Mayor Lori Lightfoot on What She Learned From Battling the Teachers' Union," *New York Times*, February 14, 2021, <https://www.nytimes.com/2021/02/14/us/chicago-mayor-lori-lightfoot-on-what-she-learned-from-battling-the-teachers-union.html>.

<sup>18</sup> *Ibid.*

This bold accusation certainly shows a fear of the union and a distrust of their intentions, highlighting Lightfoot's position as in opposition to CTU. This point of view may be shared by many others across the city and the country, as the pandemic presented new issues that did not necessarily cleanly follow traditional ideological lines. This new kind of division has hurt families' trust in both CTU and CPS, perhaps weakening the union's coalition of support that grants it so much political power.<sup>19</sup>

Without the pandemic, CTU may have continued its practice of social movement unionism uninterrupted for years to come. Instead, however, they may have set themselves up on the losing side of a highly politicized battle to reopen schools across the country. In January, as CTU members were voting to authorize a possible illegal strike, only 31% of registered voters across the country thought that schools should remain completely closed.<sup>20</sup> The support for some form of in person learning has only grown since then, both among teachers and parents.<sup>21</sup> Does this mean that CTU will lose the support of Chicagoans? Perhaps. It is impossible to say that this one period will derail a decade of successes and coalition building. Still, CTU faces steeper barriers in the coming months, perhaps indicating a fragility of social movement unionism that should be addressed if unions want to retain political power.

If the coronavirus does end up representing the downfall of CTU's social movement unionism, it will be important to closely watch how the union de-mobilizes and responds to a new political environment. Social movements, including unions practicing social movement

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<sup>19</sup> Adriana Cardona-Maguigad, "Parents Say the Feud Between CPS and the Teachers Union is Pushing Families Away," *WBEZ*, February 12, 2021, <https://www.wbez.org/stories/parents-say-the-feud-between-cps-and-the-teachers-union-is-pushing-families-away/67067d70-a23d-4d4f-aa5f-ce24627644c0>.

<sup>20</sup> Nathaniel Rakich, "Do Americans Think Schools Should Reopen?" *FiveThirtyEight*, February 19, 2021, <https://fivethirtyeight.com/features/polls-on-reopening-schools-are-all-over-the-map/>.

<sup>21</sup> *Ibid.*

unionism, will inevitably fade, though there may be long-term effects of this organizing that deserve further study.

### **Conclusions about Social Movement Unionism**

The case study of the Chicago Teachers Union over the past decade offers new insights into the longer-term challenges and opportunities for the practice of social movement unionism. It was already clear from the 2012 strike that a militant union leadership pushing for broad, grassroots-oriented policy change can inspire its membership and build coalitions. The capacity for this strategy to create long-term, successful labor contracts, however, depends on more factors than leadership choices or even a progressive rank-and-file base. While social movement unionism is often hailed as the best way for unions to reject neoliberalism, the barriers to successful social movement unionism mean that not every union will find this strategy feasible, even in the short term.

While CTU's leadership certainly transformed CTU, it is still difficult to know whether CORE's election represented a top-down or bottom-up approach to social movement unionism. CORE members would likely say that everything they do is grassroots focused and bottom-up in strategy, but their success may have been the result of powerful, charismatic individuals capable of changing members' minds. Without Karen Lewis's inspirational leadership and a general discontentment with the current leadership, would most rank-and-file members in 2010 have voted to elect CORE? This question certainly could present barriers to even beginning to practice social movement unionism for those in other cities. Many teachers talked about how the 2012 strike opened their eyes to the deeper, systemic issues their colleagues faced, but there may be

teachers across the country without access to that information because of entrenched incumbency advantages in their leadership and a more conservative city-wide culture.

For progressive caucuses who are elected to leadership, it is extremely difficult to organize an entire union into a militant and progressive movement. Going on strike can give the membership a common enemy to unite around and force teachers onto the street, which can result in a sort of consciousness-raising at rallies and events. Striking can also be extremely risky. If parents and the community turn against the teachers, social movement unionism falls apart and the militant rank-and-file will find themselves isolated from a broader political movement. Of course, many states, including Illinois, have strict labor laws that require high percentages of rank-and-file support in order to authorize a strike.<sup>22</sup> This can be a barrier for union leadership who believe striking is necessary to achieve a successful contract, but with the right base and conditions, as seen in Chicago, even restrictive labor laws can be overcome.

Additionally, the union leadership's rejection of political leadership and the business class may backfire if the community does not have a base of activism and organizing. Chicago is a particularly strong city for community organizing and unions, and without the capacity to build a powerful coalition of support, a rejection of city elites might leave teachers in a worse position politically and economically. Still, even Chicago's social movements inevitably demobilize, raising questions about how the union will go forward once their political capital has been exhausted and whether social movement unionism runs the risk of costing unions power in the long run.

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<sup>22</sup> On Friday, April 2, 2021, Governor J.B. Pritzker signed a bill that overturned the bulk of these restrictions. In repealing Section 4.5 of the Illinois Educational Labor Relations Act, CTU gained the capacity to bargain over broader issues, a major win for the union's practice of social movement unionism. Mayor Lightfoot had urged lawmakers not to pass this bill. See: Heather Cherone, "Pritzker Signs Bill Restoring Bargaining Rights for Chicago Teachers," *WTTW*, April 2, 2021, <https://news.wttw.com/2021/04/02/pritzker-signs-bill-restoring-bargaining-rights-chicago-teachers>.



Even for unions who can create enough support for a strike and overcome any logistical barriers to get teachers into the streets, social movement unionism becomes more complicated to practice as time goes on. Even for CTU, whose leadership has only been in power for a decade, rival caucuses have emerged to challenge their constant militancy. Members First, a caucus seeking to refocus union activities on teacher-specific and non-political issues, has remained active since the 2016 negotiating period and achieves enough support to run in union leadership elections.<sup>23</sup> Their existence may indicate some burnout for teachers who do not want to strike throughout every single contract negotiation. If strikes are deemed necessary to keep the rank-and-file membership engaged and united, the sustainability of social movement unionism may be called into question. Dr. Bruno, a labor scholar, said of this predicament,

[CTU] wouldn't have been successful if they hadn't tapped into [discontentment]. And [CORE] keeps getting reelected by large amounts so that tells you that they were onto something. But to ask people to constantly be mobilized is hard on the body, it's hard on the mind, it's emotionally draining. Teachers want to teach; they don't want to be in constant battles with their employer. So, you know, you hope that a contract settles things. Contracts are supposed to settle things, things settle down and they grow into their roles and you identify where, incrementally, where you have problems and you work it out in the next bargaining, too. But the idea is that it settles. If it can't settle, then you could find yourself in, sort of, constantly in conflict and if you're in conflict it could be really hard to govern. You're constantly fighting the old battles again.<sup>24</sup>

Life for CTU teachers has not settled. Two of their three contract negotiations in the last decade resulted in historic strikes and the other one left teachers without a contract for over a year. Only a year after their longest strike in decades, teachers were contemplating an illegal strike, and some were even prevented from contacting students or parents as CTU leadership attempted to negotiate a school re-opening agreement.<sup>25</sup>

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<sup>23</sup> See @membersfirstchi, Twitter, accessed April 28, 2021, <https://twitter.com/membersfirstchi>.

<sup>24</sup> Dr. Robert Bruno, in conversation with the author, November 2020.

<sup>25</sup> "CPS Will Lock Out," *NBC Chicago*.

Many of these circumstances over the past decade were unavoidable or the result of political leaders, not necessarily CORE's union leadership, but nonetheless the union runs the risk of burnout. For scholars to promote social movement unionism as the solution for neoliberalism, there needs to be clearer ways for union leaders to negotiate successfully and retain an active membership base without regular strikes that may eventually turn the rank-and-file against this militancy and activism. There also needs to be ways for unions to continue to hold their political capital even beyond the peak of their practice of social movement unionism, though how this would look remains to be seen.

This work also leaves some questions for further research. For example, CTU leaders often say that a contract is only as good as its enforcement, and while an analysis of the enforcement of each clause within each contract is beyond the scope of this project, it is an important aspect to consider. It is possible that with soured relationships between a school district and its teachers union, the district may not uphold each article within the contract as strictly. This is particularly possible in a state with anti-labor laws or increased barriers for litigation. A deeper analysis of the legal negotiation process and the influence of state labor laws are, therefore, also important to look at more closely. Additionally, there may be other possible analytical frameworks to look at this theory and case study that would provide clearer insight into other barriers and opportunities of social movement unionism. Using a different framework than the leadership-relationship-policy one developed in this work could lead to more discussion of the negotiation process, the Board of Education, the influence of politics at the state level, and more.

Finally, the success of social movement unionism for teachers in Chicago does not necessarily mean that all unions would succeed by using this practice, even with a militant rank-

and-file and strong leadership. There may be a structural privilege given to public school teachers given their proximity to most families' daily lives and the direct consequences felt when they strike. Families who send their children to public schools and any adult who works with a parent of a public school student is immediately forced to pay attention. Each day the strike goes on, political pressure mounts on the city to end the strike and an increase in media allows teachers to have their voices heard. Protecting public schools is also a politically popular issue, particularly for Democratic-leaning cities or low-income communities, and therefore creating a community-based coalition in the practice of social movement unionism is more possible. However, warehouse workers or other unions in the private sector may not have the same capacity to organize. For many sectors of work, going on strike would not shut down a city or directly impact most individuals, at least not during a short period of time. It is also harder to bring a broad political message to a private sector manufacturing job. While teachers can appeal to the emotions of the public by drawing clear connections between the classroom and their students' home lives, it may be more difficult for a steel worker to make the case to the public that their working conditions are intricately tied to broader systems of inequality. The structural and emotional advantage of public school teachers may position them as the best suited for social movement unionism, and to assume that this practice can be easily transferred to all sectors may be misleading. On the other hand, other unions may have the advantage in more conservative areas of being less politicized. Teachers' unions are often depicted as too radical, too political, and too powerful by conservatives, especially during the pandemic and the fight over reopening schools. It is possible that heavily Republican areas might have more success with social movement unionism coming from a less politicized sector, such as manufacturing, though it is difficult to truly separate any sector from politics. All these possibilities deserve further research.

So, can social movement unionism actually combat neoliberalism within schools and more broadly? With the correct social and political context, the practice of social movement unionism can be successful in preventing further neoliberal policies in education and, in certain circumstances, can actually undo several key elements of neoliberalism after a period of time. The Chicago Teachers Union's success cannot be replicated in every city by every union, but there are certainly elements that can provide knowledge for others. Additionally, the national coverage of the 2012 and 2019 strikes may have played a role in inspiring other teachers strikes across the country, and even if those strikes did not perfectly practice social movement unionism, that momentum should not be ignored. Even if individual unions will have to face context-specific barriers in replicating some of the successes from the last decade of CTU's organizing, perhaps their organizing strategy will result in a new kind of unionism for the 21st century.

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