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## Teachers' Organizations and Educational Reform: Resistance and Beyond

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### Abstract

This paper presents case studies of teacher union-government relationships in three Canadian provinces – British Columbia, Ontario, and Alberta – where teacher organizations have undertaken divergent strategic positions relative to educational reform. It identifies critical factors that may lead teacher unions to challenge government reforms, how and when a teacher organization might instead accommodate governmental reform, and under what circumstances union renewal drives an organization to establish reform strategies of its own. The paper demonstrates the results of these varied strategies and suggests that teacher unions' stances, including when they are resistant, are rational and, arguably, necessary.

*Keywords:* teacher unions, educational change, politics of education, educational reform

The image of teacher organizations presented to Canadians is often one of confrontation and strife. The Canadian public tends to know little about what teacher unions actually do except what they read in the press; teacher organizations tend to be “news” only at times when they are in dispute with governments or engaged in work stoppages, which are often framed as salary disputes and thus as demonstrating teachers' “self-interests.” Teachers themselves are generally unfamiliar with what their organizations do beyond representation, in the case of a grievance, or during strikes. The current COVID-19 crisis is, to some extent, an exception to this pattern in the sense that the provincial unions' positions are consistent with the groundswell of public and parental concern about school re-openings; but even in this case, what is considered newsworthy about teacher unions is negatively framed: for example, in Ontario, Premier Doug Ford recently remarked,

*Throughout this whole pandemic, everyone's been flexible, everyone's getting along, you know — even different political stripes. Why is it that (with) the teachers' unions, it's just constant? They constantly want to attack. Why don't you be part of the solution, instead of part of the problem? (Rushowy, 2020, p. A2)*

Teachers' organizations in many parts of the world have found themselves increasingly marginalized from policy making processes (Bascia & Stevenson, 2017). The expectation among policymakers is that teacher union priorities should be consistent with prevailing policy or that they should not be involved in policy setting at all (Bascia, 2018). When teacher unions raise concerns about the adequacy of support for teaching, they are viewed as irrelevant and out of touch. If they challenge prevailing reform directions, they are viewed as obstructing change. If they should take up reform initiatives of their own, they are seen as overstepping their rightful roles. These perceptions make it difficult for union staff and officials to establish credibility and to work proactively within educational policy systems (Bascia, 2004).

This paper seeks to explore the conditions under which teacher unions take particular positions relative to educational reform. It also provides an account of the effects of these strategies. It suggests that

teacher unions' various stances, including when they are resistant, are rational and, arguably, necessary. It presents case studies of teacher union-government relationships in three Canadian provinces – British Columbia, Ontario, and Alberta – where teacher organizations have undertaken divergent strategic positions relative to educational reform. The cases are drawn from larger studies that depict teacher organizations' relations with provincial governments, in the context of both internal and external factors (Bascia, 2008; Bascia & Osmond, 2013; Maharaj, 2019). Adopting a typology developed by Carter et al. (2010) that describes a variety of teacher organization strategies, the paper identifies critical factors that may lead teacher unions to challenge government reforms, how and when a teacher organization might instead accommodate governmental reform, and under what circumstances union renewal drives an organization to establish reform strategies of its own.

Like the US and Australia, where education is a provincial rather than a federal matter, in Canada, it is provincial-level teacher organizations that interact, or attempt to interact, with educational decision making. The level of government at which educational policy is made is only one difference among countries: most generally, there are differences in the general cultures of union-governmental relations and marked differences in the educational realities that teacher unions are concerned with.

The sections that follow review the literature with respect to teacher unions and educational reform. It then provides a full description to the Carter et al. typology, describes the data sources underpinning the provincial organization case studies, offers three case descriptions of when and why Canadian teacher unions have chosen among different reform strategies, and discusses the implications of the research for educational researchers, the press, and policymakers.

## Literature Review

In many parts of the world, when teacher unions take a stand against neoliberal reforms, they are cast as illegitimate policy actors and are marginalized by policymakers (Bascia & Osmond, 2013; Fourcade-Gourinchas & Babb, 2002). For example, during neoliberal reforms in 1980's New Zealand, teacher unions were seen as “motivated by self-interest” (Codd, 2005, p. 195). In Britain under New Labour, government consultation became a privilege reserved only for those teacher unions with a “cooperative attitude,” while others were portrayed as vested interests that obstructed necessary education reforms (Exley, 2012).

A similar view prevails among many American researchers that view teacher unions as obstacles to positive educational change (Johnson, 2004). For example, Lieberman (1993, 1997) characterized teacher unions as the single biggest obstacle to education reform. Peterson et al. (2014) propose the metaphor of an “iron triangle” to explain the role that teacher unions play in education systems because “triangles relentlessly resist change” (p. 6). A more recent example comes from American Education Secretary Betsy DeVos, who remarked that teacher unions are “the only thing standing in the way” of increased school choice in America (Klein, 2019, para. 2).

Teacher unions have been characterized a “special interest” group (Moe, 2011), similar in function to that of oil, tobacco, and sugar lobbies (Greene, 2012). It has been stated that teacher unions work to maximize teacher entitlements while reducing teacher productivity and student achievement (Moe, 2011). It has been taken as gospel that teacher unions and collective agreements compete with student learning in a zero-sum environment (see for example, McDonnell & Pascal, 1988) as they prevent administrators from restructuring schools in ways that would better benefit students (Hess & Kelly, 2006). The improved working conditions that unions fight for are viewed as “feel good” items that only benefit teachers (Leithwood, 2006) at the expense of students.

Given this sentiment, American researchers have argued that an explicit goal of recent market-based education reforms (e.g., charter schools) is to break the “monopoly” that teacher unions hold over schools (Krisbergh, 2005). For example, Mariano (2015) argues that American reforms like No Child Left Behind and Race to the Top incentivized states to enact reforms that undermined teacher union interests. Indeed, in the past decade, laws restricting teacher unions' right to collectively bargain were proposed and enacted across much of the US and in a number of other jurisdictions (Freeman & Han, 2012). This marginalization helps to explain a common conception of teacher unions as reactionary. Indeed, as they are rarely offered substantive input in educational policymaking, teacher unions often are left to respond after the fact to decisions that have already been made (Bascia, 2009; Hilferty, 2007).

In Canada, the extent to which teacher organizations are seen as legitimate participants in setting

educational directions depends on who the government officials are at any given time. Because provincial governments have official Constitutional authority over education, and because Canadian labour law restricts teacher unions to negotiating salary, benefits, and working conditions (Bascia, 1998), union participation in educational decision making is not a given but is only possible at the pleasure of the government in power. When a government is largely socially progressive, teacher organization leadership tends to enjoy access to policy decision-making (Taylor, 1978). When a conservative government's agenda advocates for such reforms as fiscal austerity in the public sector, the adoption of more traditional curriculum, or support for privatization with public funding, typically teacher unions are relegated to a place outside the policymaking arena (Bascia, 2008; Bascia & Osmond, 2013; Poole, 2015).

While it does not represent a large corpus of work, the Canadian research on teacher organizations is rich and varied. This paper follows the tradition of other studies on the relationship among teacher unions and provincial policy-making (Bascia & Stevenson, 2017; MacLellan, 2009; Poole, 2000, 2007, 2015). Maharaj's (2019) study looks at this relationship in the context of the role of public opinion, while Bocking's (2020) work focuses on governmental actions and union responses and the impact on teachers' work. Another topic of some interest to Canadian researchers is how teachers and their organizations characterize the concept of professionalism (Osmond-Johnson, 2015, 2018; Rodrigue, 2003), drawing attention to longstanding questions about what the characteristics of professional occupations are, whether unionized workers can also be considered professionals, and how and to what extent teacher organizations support professional activities. A cluster of studies focuses on Canadian union-sponsored professional learning and other activities for teachers (see for example, Bascia, 2000; Couture, 2015; Naylor 2015; Osmond-Johnson, 2019). Rottmann's case study (2012) focuses on the social justice work teachers and staff do in and through the British Columbia Teachers' Federation (BCTF).

Other Canadian research takes similar topics as the US literature. For example, Smaller's historical research (e.g., 1991, 2015) reveals the consistency of teachers' issues over time, detailing how teachers' living and working conditions and inequitable salaries under the newly designed school systems of 19<sup>th</sup> century Ontario prompted the initial organizing of teacher unions (see Urban, 1982 for parallel movements in the United States). *Teacher Unions in Canada*, written by Lawton et al. (1999), is concerned with the impact of collective bargaining and unions' lobbying efforts on educational quality (US treatments include Bascia, 2005; Carini et al., 2000; Kerchner et al., 1998; Koppich, 2005).

Working conditions have been a perennial concern for teachers since the establishment of mass public education in North America (Smaller, 1991; Urban, 1982), as the prevailing educational policy has often ignored the factors (e.g., class size, manageable workloads, adequate resources) that teachers themselves identify as necessary for high-quality teaching (Oakes, 1989). This explains why improving teaching conditions has been at the forefront of teacher unions' work. When teacher unions successfully bargain for enhancements to teachers' working conditions, this can improve teacher effectiveness in ways that lead to increased student learning (Johnson & Donaldson, 2006). This should not be surprising because "What teachers actually do in their schools and classrooms depends on how teachers perceive and respond to their working conditions" (Leithwood, 2006, p. 6).

Teacher unions serve as an important source of feedback to other policymakers on micro-level (classroom) and meso-level (school) conditions and their response to educational reforms (Bascia, 2018). The omission of these considerations may help to explain why many educational policies fail to achieve their objectives and set off various unintended consequences (Bailey, 2000). It is therefore useful for policymakers to recognize the potential utility in the positions that teacher unions take in response to educational reforms.

### **Conceptual Framework: Resistance, Rapprochement and Renewal**

Teacher organizations do not always present challenges to educational reform; they may, in fact, support or even initiate reforms of their own. International research on teacher unions provide examples of all of these possibilities (see Bascia 2017; Bascia & Stevenson, 2016; Carter et al., 2010). For example, in most of Scandinavia, according to teacher unionists, a "culture" and, indeed, legal framework exists that involves policy consultations as routine practice. Labour unions, among others, are closely involved in policy development processes, working with government through both formal and informal channels. In a study published in 2013 (Bascia & Osmond) that took place in Sweden, unions have worked with the government to develop curriculum, assessment, inspection, professional learning, performance man-

agement systems, and more – even in times when a conservative government has been in power. In that same study, researchers found that in South Africa, like other African countries still in the process of developing basic educational infrastructure, teacher unions pioneered new approaches to teacher evaluation and professional development, as well as advocating for basic teaching and learning conditions like textbooks, school buildings, and teacher pay. In this latter example, the teacher union saw its actions as compensating for provisions the federal government could not (yet) take.

This paper utilizes a framework first presented by Carter et al. (2010) to describe three distinct approaches that teacher unions, like their counterparts elsewhere, may take when responding to education reforms: *resistance*, *rapprochement*, and *renewal*.

- *Resistance* strategies actively challenge the rollout of government reform. A teacher organization's rejection of the ideological basis of an education policy and its likely impact on teaching and learning means that it is not realistic for mutually acceptable solutions to be achieved if representing teachers' interests is important. Teacher union resistance often involves adversarial forms of collective bargaining and publicly visible conflict with the government in power. Public opposition provides clarity and transparency of a union's position and can work to both inform and mobilise teacher union members. However, resistance may strain public support for organized teachers and lead to criticisms that the union is merely content to be "on the sidelines sniping" (Carter et al., p. 149).
- *Rapprochement* refers to an acceptance of governmental reform policies on ideological or pragmatic grounds and attempts to maximize gains for its members. For example, instead of challenging the existence of a standardized testing or teacher evaluation program, a *rapprochement* strategy may seek instead to influence how the program is implemented. The adoption of *rapprochement* may include a level of willingness among both teacher unions and the government to work collaboratively towards solutions to commonly agreed upon problems. *Rapprochement* can provide a teacher union with enhanced access to government officials and authority to influence education policy. For example, in England in the 2000s, many of the teacher unions worked together with the government to make decisions about educational "remodeling." However, *rapprochement* can also lead to teachers' perceptions of "being in the pocket of Government and losing your independence" (Carter et al., 2010, p. 148). *Rapprochement* is fundamentally about settling for an agreed outcome which can serve as a constrained form of "win-win".
- *Renewal* requires the development of greater local capacity on the part of the union to build greater member engagement (Ironsides & Seifart, 1995). Fairbrother (1994) argues that many public-sector unions tend to be excessively hierarchical, bureaucratic, and remote from their members. Renewal involves establishing an organizational structure that is more responsive to teacher-driven and social change. In many parts of the world, privatization along with other neoliberal education reforms like decentralization, often work to fragment the teaching profession and weaken the organizational power of teacher unions (Suleiman & Waterbury, 1990). However, reforms that attempt to fragment union influence can at times provide an opportunity for a union to adopt a more flexible, democratic, responsive, and participatory organizational form (Fairbrother, 1996). By shifting away from exclusive attention and response to government actions and towards the influence of a teacher organization's own members, renewal can lead to the development of a deeper understanding of teachers' issues such that the organization becomes more proactive in its relationship to educational policy.

This paper explores the contextual factors that influence teacher unions' relationship with educational reform. In the Canadian research that we have conducted and reviewed, factors particular to any given union appear to matter such as a union's history, ideological orientation, and organizational structure. The nature of the proposed reforms, how union leaders believe these reforms will impact the working conditions of its members, public opinion, and the political climate in which a union operates are further considerations that teacher organizations must respond to. To put it more simply, it is the interface of a union's own internal elements with these external factors that drive its reform position.



## The Cases

The Canadian data that directly inform this paper were drawn from several studies conducted by each of us over the past few decades. In these studies, we spent time with each of the provincial organizations, conducting in-depth interviews with union staff, elected leadership, union-active teachers, and knowledgeable outsiders. We also analyzed provincial newspaper accounts of the unions and critically read other researchers' work on educational politics in which the provincial federation was a prominent player (e.g., for Ontario, Gidney, 1999; for Alberta, Kachur, 1999; for British Columbia, Poole, 2015). In the case of the Ontario Teachers' Federation, interactions and interviews were undertaken over a multi-year period to evaluate, over several years, an initiative intended to support school-centred educational change projects; for the Alberta Teachers' Association, case, up-close research was undertaken in relation to two different studies over a ten-year period that looked at teacher unions as learning organizations, and teacher union-governmental relations. The British Columbia case is primarily based on a study conducted in 2017 and 2018 that examined how the union attempted to influence public opinion. The analysis is also informed and contextualized by a range of other research and evaluation studies undertaken by each author in other local, provincial, and national contexts around the world over the past several decades (see for example Bascia, 1994, 2000, 2005, 2008, 2017; Bascia & Stevenson, 2017; Maharaj, 2019).

We present cases of teachers' organizations in British Columbia, Ontario, and Alberta, the three most populous provinces in Canada, as they have the greatest organizational capacity, in terms of funding (from teacher union dues) and human resources (in terms of staff complement, organizational structure, and institutional memory), and thus the greatest potential influence on their respective provincial governments. Case studies of these three organizations illustrate the conditions under which the three different response approaches identified above are likely to be adopted.

### *The British Columbia Teachers' Federation (BCTF)*

The BCTF, known for its history of social activism, has represented teachers in British Columbia since 1917. Total membership has fluctuated between 30,000 to 35,000 over the last two decades. In 1961, the BCTF achieved representation on provincial curriculum committees. In the 1980's, the BCTF began a major campaign to expand the scope of collective bargaining to include conditions of teachers' work such as class size and composition. The campaign met with success as several locals were able to bargain these "expanded scope" elements into their contracts. In 1987, the BCTF achieved full collective bargaining rights, including the right to strike. Over its history, the BCTF has tended to orient itself towards *social unionism*, which combines collective bargaining with "community-based action for broader, even radical, social change" (Shantz, 2009, p. 113).

The BCTF has utilized different strategies in response to the various education reforms that have been proposed in British Columbia over the last three decades. In the 1990's, the BCTF pursued a *rapprochement* strategy with the governing New Democratic Party (NDP), which shifted collective bargaining away from local districts to the provincial level. While the teachers' organization did not support the shift, as it undermined the principle of bargaining based on local needs, it saw an opportunity to work with the government to ensure that, in exchange for an effective wage freeze, the new provincial agreement contained significant reductions in K-3 class sizes, firm class size limits in other grades, increased special needs supports, and the establishment of guaranteed staffing levels for specialist teachers (such as guidance counsellors and librarians). Thus, even within the context of a reform it opposed, the BCTF was able to work with the government to achieve improvements to its members' working conditions. It is important to note that this *rapprochement* strategy required an NDP government that was willing to work collaboratively with the union.

In 2001, the NDP government was replaced by a Liberal government, which had campaigned on a business-friendly, fiscally conservative platform. The Liberals had promised to "support more flexibility and choice in public schooling" and "restore education as an essential service under the Labour Code, to ensure that no child's right to an education is denied during school strikes and lockouts" (Ungerleider & Krieger, 2008, p. 277). On their very first day in office, the Liberals reduced personal income taxes by 25% across all income brackets. This was followed by an 18% reduction in corporate tax rates. The government's challenge then became how to pay for these deep tax cuts. As it was the second largest area of the provincial budget, education was a prime target, but collective agreements were perceived as a barrier

to achieving cuts of the magnitude required.

The Liberals introduced essential service legislation for teachers which limited their right to strike. They then followed through on their school choice priority by passing legislation that gave students the right to attend any public school in the province, subject to capacity constraints. This had the effect of increasing competition for students between schools and school districts. In 2002, the Liberals introduced the *Public Education Flexibility and Choice Act*, which removed the class size and composition provisions from teachers' contracts. Liberal leader Gordon Campbell had met with the BCTF during the election campaign and had promised to honour their contracts if elected, so the attack on collective agreements came as a complete shock.

While they reduced public education spending, the Liberals also increased public funding for private schools. Thus, it was the opinion of many within the BCTF that the Liberals intended not just to save money, but to pursue a privatization strategy by undermining the public system to the point that a growing number of parents would explore private alternatives. Indeed, private school enrolments in British Columbia increased every year and grew as a proportion of overall school enrolment, from 8.6% to 10.6% between 2001-02 and 2008-09, (Van Pelt et al., 2015).

Given the attack on teachers' collective agreements and arguably on public education itself, it became clear that a *rapprochement* strategy was not going to be possible. The BCTF pursued a full-fledged *resistance* strategy instead. Just after the passage of the *Public Education Flexibility and Choice Act*, the BCTF launched an illegal one-day teacher walkout across the province. Schools were closed and thousands of BC teachers attended rallies organized by the BCTF. The largest took place in Vancouver at the Pacific Coliseum, where 12,000 teachers gathered in protest of the government's actions. The provincial organization allocated \$5 million towards an extensive advertising campaign and mobilizing school-district level union organizations across the province against the government. During this time, the key public message that the BCTF put out was that the legislation passed by the Liberal government was going to result in fewer teachers, larger classes, and less support for students with special needs.

The BCTF took its message directly to parents by posting materials related to class size increases in schools and asking teachers to speak about it during parent-teacher meetings. Through Freedom-of-Information requests, the union collected government class size data to document and publicize the magnitude of the increases across the province. The union also invested heavily in building the capacity of school-district level union organizations to engage with parents and school parent advisory councils. This included public relations training on how to compress complicated education policy issues into language that would be easy for parents and the public to understand.

In response to these strategies, Premier Gordon Campbell asserted that while the BCTF claimed to be protecting public education, the union was in fact motivated by "their own special interests" (Steffenhagen, 2002, p. A1). This was a popular characterization of the BCTF at the time, as it represented the only significant opposition to the government's education reforms. Indeed, the passage of the *Public Education Flexibility and Choice Act* had been publicly welcomed by groups representing parents, administrators, and school boards. Given this climate, pursuing resistance represented a risk-filled strategy that could have resulted in the BCTF becoming further marginalized in the province's policymaking ecosystem.

In 2005, however, after four years of advocacy, public relations, protests, and strikes by organized teachers, there was eventually widespread public belief that the Liberals' education reforms were having a deleterious effect on schools. A poll by Ipsos Reid (2005) found that a majority of BC residents now supported the BCTF in their campaign. British Columbia's largest newspaper, the *Vancouver Sun*, noted that,

*After years of talking, [the BCTF has] finally convinced almost everyone – including government – that something needs to be done about the challenges many face in teaching large classes with growing numbers of students who have special needs affecting learning and behaviour. (Steffenhagen, 2005, p. A4)*

The BCTF's history of social activism and the perceived threat to public education posed by the Liberal government's education reforms is what led the union to adopt a *resistance* response strategy. By 2005, this strategy had persuaded all major education stakeholders in the province that the Liberals'

reforms were a mistake. The BC Confederation of Parent Advisory Councils, the BC Principals and Vice-Principals Association, and the BC School Trustees Association, groups that had initially supported the *Public Education Flexibility and Choice Act*, now publicly asserted that class sizes, class composition, and special-needs education were issues requiring urgent provincial attention. The government responded by conceding that these were issues of concern and announced an infusion of \$150 million into the education system to address class size reduction and increased special need supports.

### *The Ontario Teachers' Federation (OTF)*

The Ontario Teachers' Federation was created in 1944, the same year as a provincial *Education Act* enshrined the requirement that all teachers in publicly funded schools belong to a constituent federation. The OTF was the umbrella organization for, at that time, five provincial teacher unions with distinct membership and with somewhat different priorities: AEFO, the *Association des enseignantes et des enseignants franco-ontariens*; FWTAO, the Federation of Women Teachers Associations of Ontario, representing female elementary educators; OECTA, Ontario English Catholic Teachers' Association; OPSTF, Ontario Public School Teachers' Federation, representing male elementary educators; and OSTF, Ontario Secondary School Teachers' Federation. In four of the five Ontario's affiliates, school administrators were also members of the relevant federation with equivalent membership rights. While the five affiliates took responsibility for local (board-level) collective bargaining – salary, benefits, and working conditions – and claimed they represented the collective voices of their members, the OTF was the vehicle through which teachers interacted with the provincial government around issues of pension, teacher education, taking public positions on issues affecting education, preserving collective bargaining rights, promoting teachers' involvement in curriculum policy development and, until 1995, handling teacher discipline cases.

The years between 1945 and the present saw a variety of dynamics in play between the OTF and the provincial government. Provincial educational system reorganizations caused concomitant changes in how the OTF and the affiliates each worked -- with the amalgamation of many small school boards into fewer, larger boards in the 1960s and again in the 1990s, and episodic system changes from decentralized school board jurisdiction over many educational matters to centralized provincial control. Conflict between teachers' organizations and the provincial government has been a recurrent theme, with massive demonstrations of teachers in every decade since the 1970s, although there have also been periods of relative conciliation and calm (Gidney, 1999; Ontario Teachers' Federation, 1994).

Over the last three decades, the OTF and its approximately 160,000 members have taken varied approaches towards its relationship with the government of the day. Relatively early in its tenure, in 1992, a left-leaning New Democratic Party government set a bold new direction in Ontario's education system by declaring a number of policy changes that placed decision making authority for program development in the hands of educators in schools and school boards. Among the new directions were the “destreaming” (de-tracking) of Grade 9, based on the premise that early adolescence was too early for youth and their families to choose an educational trajectory that would lock them into a university, (community) college or work future (see Oakes, 1985); cross- and inter-disciplinary approaches to curriculum delivery; and new, more “authentic” forms of assessment of student learning (Gidney, 1999). While the province did not cede its executive authority over educational policy, the OTF participated informally, through relatively frequent interactions, in providing policy input or critique; and through the conduit of the federations, teacher expertise was tapped, for example, for developing provincial curriculum policy.

Given a supportive provincial government that sought to work in partnership, the OTF adopted a *rap-prochement* stance. In 1993, Ontario's Ministry of Education sent out a call for proposals for provision of support to educators as they developed context-appropriate new directions, designed new school-based programs, and trouble-shot implementation problems. OTF leaders were quite taken with the notion of supporting teacher-led change, particularly given secondary school teachers' concerns about implementing de-streaming. The contract was awarded to the OTF and the initiative, called “Creating a Culture of Change,” or the “3Cs”, began that fall. A cadre of educators from across the province was trained in facilitation skills to support school-based collaborative projects. The 3Cs also set up an “electronic network” with trained educator-moderators so that teachers and principals across Ontario could share information about new educational practices.

However, educational reforms can be politically volatile. Changes in educational directions are typi-



cal of new governments, and changes in objectives and in who directs educational policy may also occur over the years a government is in power. Under the New Democratic Party, three different Ministers of Education were appointed between 1993 and 1995. By 1995, the 3Cs' mandate had been altered from increasing local capacity building to ensuring that educators were in compliance with provincial policy targets.

When a Conservative government led by Mike Harris came into power in June 1995, it shut down the 3Cs initiative and put in place several mandates for compliance with new centrally determined directives. Harris was openly hostile to the teacher federations and made a point of referring to federation presidents as "union bosses" (Lennon, 2017, p. 3). The Harris government also discontinued the practice of including federation leadership in policy discussions. In 1997, after the government proposed massive cuts to education funding, including reductions in teachers' preparation time, a full-fledged *resistance* strategy ensued with a three-week teacher walkout, the largest in North American history. When principals would not ensure that the province's schools remained open, school administrators were stripped of their federation membership. This reduced not only the financial resources available to federations but also the system knowledge held by principals and vice-principals that the federations had relied upon. While the walkout was ultimately unsuccessful in reversing the Harris government's reforms, it raised public consciousness around the issues for which the OTF and its affiliates had been fighting. It helped to alter the news media discourse around the Harris education agenda and led to the emergence of parent groups that took up the fight against funding cuts (Richter, 2007).

In 2003, a new Liberal government led by Dalton McGuinty came into power, vowing to undo the harm to the education system caused by the Conservatives and repair the relationship with teachers. Billions of additional dollars were put into the education system through the reduction of primary class sizes and the introduction of additional supports for students. During this time, the OTF adopted a *rap-prochement* stance, not just because it agreed with these policy reforms, but because they were crafted in partnership with the unions. As one long-time union staff member remarked,

*When Mike Harris was here, Queen's Park was closed to us. They did not want to hear us, talk to us, see us in the doorway. They wanted nothing to do with us. We could not get arrested at Queen's Park. There was a huge change when Dalton McGuinty was elected premier. All of a sudden we were working with them on Ministry work groups, on curriculum. They were seeking our advice. It was a very different relationship. (Maharaj, 2019, p. 92)*

An initiative that supported the development of teacher leaders, the Teacher Learning in Leadership Program, was launched in 2007, jointly supported by Ontario's Ministry of Education and the OTF (Campbell et al., 2017). The Liberal government and OTF entered into a practice of four-year collective agreements to ensure "labour peace." During this period of rapprochement, from 2003 to 2012, Ontario's high school graduation rates increased from 68 to 83 per cent.

### ***The Alberta Teachers' Association (ATA)***

The ATA represents over 50,000 teachers and administrators in public and Catholic schools in the province of Alberta. The organization (first known as the Alberta Teachers' Alliance) emerged in 1918, at a time when poor salaries and working conditions contributed to teachers leaving the profession by the hundreds; the ATA served as the primary vehicle for Alberta's teachers to organize and advocate for improvements to the teaching profession. The ATA's efforts resulted in a salary minimum for teachers, standard teacher employment contracts, and the right of teachers to a hearing before dismissal. In 1935, the ATA achieved what the organization viewed as its most important goal: the establishment of teaching as a recognized profession under the *Teacher Profession Act*, which granted professional status to teaching and gave the ATA concomitant recognition and responsibilities under the law. The *Act* also made membership in the ATA automatic for teachers and principals in publicly funded schools.

The ATA has since made the professionalization of teaching one of its primary areas of focus. In the 1940s, the ATA spearheaded the transfer of teacher training from normal schools to universities. In 1970, the Association lobbied for legislation requiring all teachers to complete a four-year Bachelor of Education degree. The ATA has worked closely with the University of Alberta in developing, oversee-

ing, and delivering its programs in teacher education, schools administrator preparation, and graduate studies (Bascia, 2008). Today, the ATA devotes over 15 percent of its operating budget to professional development, triple the proportion of most teacher unions in the United States (Couture, 2015). Given the conservative political culture of the province and its own members, unlike many teacher unions, the ATA does not affiliate with other provincial labour groups and tends to avoid partisan action.

From 1971 to 2015, Alberta was governed by the centre-right Progressive Conservative party. Largely reliant on its oil and gas industry, the province's economy and government revenues fluctuated in tandem with petroleum prices. During the "oil bust" of the 1980s, Alberta's education spending decreased, over the same time period that every other Canadian province saw significant increases. This created a climate of "rising expectations and shrinking resources" in Alberta schools (Flower & Booi, 1999, p. 124).

During the premiership of Ralph Klein that began in the 1990s, Alberta's government took a particularly rightward turn. In addition to the privatization of the telephone and deregulation of the electricity and natural gas industries, Klein implemented widespread cuts to public spending. When it came to education, teacher salaries were cut by five percent, and the province's ministry of education was reduced and restructured (Bascia, 2008).

The government argued that Alberta's schools "needed market discipline" (Kachur, 1999, p. 62). A new "business style of management" was introduced that encouraged principals to "become managers instead of educators" (Bascia, 2008, p. 173). Attempts were made to remove principals from the ATA, although they were ultimately unsuccessful. Government-funded teacher professional development supports were reduced to one day of training per year.

While many teacher unions might have responded with resistance, given the union's focus on professionalization and the province's conservative political climate, the ATA pursued a *renewal* strategy to fill many of the gaps created by reduced government funding. This included liaising with faculties of education across the province. The ATA viewed this as an opportunity to better engage with its teacher members and assert its own leadership in the educational ecosystem. As Bascia and Osmond (2013) put it,

*While other teachers' organizations have argued that it is the school system's responsibility to support teachers' work, the ATA has perceived such gaps as opportunities to challenge the government by asserting its own orientation to teaching and schooling. (p. 25)*

In addition to frequent member surveys, ATA staff began working to minimize boundaries between the organization and its members by, according to interviewed staff, spending approximately half of their time each week in the field. By regularly visiting schools across the province, staff members obtained a better understanding of teacher needs at the school and classroom level and ensured that the organization retained legitimacy in the minds of its members.

Special attention was paid to the needs of educators in different geographic settings (urban vs. rural and remote), levels (elementary vs. secondary), genders, subject areas, and roles (teachers vs. principals). The ATA actively worked to prevent the privileging of certain groups over others by supporting special interest caucuses which acted as lobby groups within the organization. In the early 2000s, the Diversity, Equity and Human Rights Committee made a significant effort to build networks of activists. The organization recruited staff from across the province with diverging views and ensured that different subunits (e.g., professional development, collective bargaining, teacher welfare) were always represented on the leadership team so that, unlike many other teacher organizations (Bascia, 2009), collective bargaining did not dominate organizational politics and priorities.

The ATA was particularly active in its provision of professional learning opportunities for teachers. In the face of reduced funding from the provincial government, the Association worked with school districts to create professional development programs throughout the school year based on locally defined needs. The ATA also created its own workshops on a range of issues of concern to members, including conflict resolution, classroom management, inclusion of students with special educational needs, and student assessment. When the government mandated individual professional growth plans for teachers, the ATA bid and won the contract to develop the associated materials and to support school leaders, including those focused on the supervision and evaluation of teachers. The organization used this opportunity

to emphasize the importance of professional judgement on the part of both teachers and administrators.

With the aim of acting as a counterweight to the provincial government's neoliberal education reforms, in 2011, the ATA partnered with Finland's Board of Education to create the Finland-Alberta (FINAL) international partnership. Whereas many educational partnerships are rooted in personal relationships between union leadership and senior-level policymakers, FINAL connected five Alberta high schools with seven Finnish high schools to create a professional network of educators to exchange ideas and spur local innovation (Couture, 2015). Successful school-level reforms that emerged from FINAL were then disseminated across each jurisdiction (Shirley & Lam, 2012).

In 1999, in response to the government's proposal that school authorities receive financial incentives for improving performance on provincial standardized tests (the School Performance Incentive Plan) the ATA worked with education partners to formulate an alternative, the Alberta Initiative for School Improvement. This ground-breaking educational program funded action research projects designed by school communities over three-year cycles. Central to AISI was the role of teachers designing the projects and developing a mix of locally developed and provincial measures of success. From 1999 to 2008, over \$500 million was committed to support action learning and research in schools to improve student learning.

It is important to note that even though Alberta's conservative political climate made it generally unpalatable to many of its members, the ATA did utilize *resistance* strategies when leaders believed they were absolutely necessary. For example, in the early 2000s, the cumulative effects of years of chronic underfunding had become increasingly evident in teachers' classrooms (Reshef & Rastin, 2003). Promises from the government to address class sizes and to meaningfully increase teacher salaries never materialized. Thus, in February 2003, the ATA launched a three-week province-wide strike that eventually resulted in the government addressing the class size and teacher pay issues (Barnetson, 2010).

## Discussion and Conclusion

This paper explored teacher unions' relationship to educational reforms and illustrated a world-wide phenomenon by zeroing in on the range of responses of Canadian provincial organizations. It provided an analysis of the conditions under which unions may select rapprochement, resistance, or renewal, and it demonstrated the logic inherent to the strategic choice taken in each context. As teacher unions are often excluded from educational policymaking and education reforms are unilaterally imposed by governments, in many parts of the world, resistance strategies tend to be prominent. All three of the teacher organizations presented in this paper utilized different strategies in engaging with educational change, each with varied results. The involvement of a teacher union vis a vis educational reform is best understood as an interplay between the organization's internal dynamics, the political context in which it operates, and the nature of the specific reform(s). These factors and the relationships among them are dynamic rather than static, such that any organization's stance may change over time.

Maintaining an even position between the wishes of teacher members and a working relationship with government is always a challenge for teachers' organizations because of the great distance between the realities of schooling and policymakers (Bascia, 2008). The official role of the Ontario Teachers' Federation is to serve as a conduit between the provincial government, where constitutional authority over educational policy rests, and the OTF's affiliates, which represent different stances amongst themselves with respect to educational change. These internal realities result in a challenge to any argument that the OTF can represent all teachers' interests: it is the affiliates, working somewhat independently of each other, that directly engage with the public, not the OTF, when they are critical of governmental reform directions. The OTF has a relatively strong interest in maintaining productive working relations with the government while refraining from assuming a stance that any of the affiliates might take exception to. This helps to explain the OTF's rapprochement approach in partnering with the province on reforms that will not raise the ire of any of the affiliates and are outside their direct purview (e.g., initiatives that build teacher capacity).

Of the three teacher federations, the British Columbia Teachers' Federation has been most closely aligned with the broader labour movement. During the period of its conflict with the BC Liberal government, the BCTF joined both the BC Federation of Labour and the Canadian Labour Congress. The BCTF has a history of strong social and political activism within its home province. In addition to the nature of the reforms themselves, this orientation helps to explain why the BCTF adopted a *rapprochement* strat-

egy when the left-leaning BC New Democratic Party centralized collective bargaining but took a strong *resistance* stance in response to the neoliberal reforms of the conservative BC Liberal party.

Over the past few decades, the Alberta Teachers' Association has responded to what its leaders perceive as problematic reforms by increasing educators' capacity to deal with the changes as productively as possible even while it voices reasoned opposition to the government. It is the most member participative of the three organizations, and as such is able to take into account current conditions of teaching and learning across the province. The ATA thus can consider whether and how any government-initiated reform can be framed or reframed to improve teaching and learning. Given the conservative political climate in Alberta, the ATA has tended to utilize full-fledged *resistance* strategies more sparingly than their counterparts in British Columbia and Ontario. At the same time, it has persisted in developing and implementing its own reform initiatives. In this way, the ATA has been able to "maintain an even keel" even as governments come and go and provincial educational directions change (Bascia, 2009).

This paper builds on the Carter et al. (2010) framework by analysing the conditions under which teacher unions are likely to adopt resistance, rapprochement, and renewal strategies. Each of the unions profiled in the above cases had unique internal dynamics and operated in distinct provincial contexts, and each adopted different strategies in response to specific reforms. This demonstrates the fluid, dynamic nature of union-governmental relationships. A limitation of the Carter framework is that it presents response strategies as mutually exclusive, while in practice, unions may be pursuing multiple strategies simultaneously. For example, even when the ATA was engaged in resistance which culminated in its 2003 strike, its renewal process of better engaging its membership continued unabated. It could also be the case that response strategies reinforce each other. For example, a more responsive organizational structure that comes about as a result of renewal can translate into better engaged members that are more likely to be committed if called upon to engage in resistance strategies. Similarly, a union that has a history of rapprochement and working constructively with governments may enjoy greater public credibility if and when resistance becomes necessary.

Analyses of the three cases have implications for policy researchers, the press, and policymakers. A teacher union's internal dynamics and relationships have some bearing on its ability to respond effectively to educational change and, indeed, to lead the way. For educational researchers and the press, the implications of this article are that the notion of teacher unions as typically obstructive are too simplistic to be useful. Instead, we argue, attending to the different strategies taken by a teacher organization may enable the understanding of the nature of the internal workings within the union, the tenor of ongoing relations between them and provincial government, and teaching practice on the ground. For governments, it is important to remember that, because teacher organizations' responses to educational policy tend to be grounded in considerations of its potential impact on the quality of educational delivery, if a policy is to be effective at achieving its goals, it would be prudent for policymakers and educational leaders to recognize teacher union responses as an important source of feedback on how educational reforms are likely to impact teaching and learning conditions.

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