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A little help from our friends

exploring and understanding labor-community coalition (coalition unionism) formation

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Abstract

Union renewal and coalition unionism are widely considered necessary, however the different factors that provoke union engagement in coalitions is under-theorized. This article considers six factors that help explain when a union is likely to form a coalition with a community organisation using the term community and the dialectic of opportunity and choice. It then explores this framework by comparing two case studies of union engagement in long-term coalitions in Australia and Canada. The article finds that pre-existing union identities, common interest and decentralized union structures are important factors in coalition formation and whether member participation is likely in coalition activity. It highlights that unions are likely to engage in coalition unionism when there is a coincidence of crisis and perceived opportunity for coalition practice, while noting that the depth of union engagement is greatly affected by the type of union actors that initiate coalition participation (whether officials, factions, organizers or delegates). The article finds that different passages for coalition unionism are possible, and they can originate inside unions or be provoked externally by coalitions. It stresses that union leadership support for coalition unionism may be necessary for coalition practice, but it is not sufficient for generating deep union engagement in coalitions.

The decline of union membership and the corresponding decline in institutional support for unions have led to the practice and study of union renewal. Yet indicators of when a

shift to renewal is likely to occur are uncertain, and often a secondary focus of scholarship. One approach to union renewal is social movement unionism. It argues that unions should renew the 'movement' features of unionism, referring to strategies such as rank and file mobilization, coalition building, political action, new member organizing and union education (Bronfenbrenner, Freidman, Hurd et al. 1998; Kelly 1998; Nissen 2003; Behrens, Hamann and Hurd 2004; Milkman and Voss 2004). Amidst this approach, the role of coalitions is debated, ranging from providing support for union organizing and collective bargaining campaigns, to being the key measure of social movement unionism (Turner 2001; Clawson 2003; Reynolds 2004; Turner 2004).

This article focuses on coalition unionism, also known as labor-community coalitions, and aims to investigate when a union is likely to work with a community organisation in coalition. I describe this as coalition unionism formation. The article suggests some conceptual factors and introductory empirical analysis to help us understand the uneven development of coalition unionism between unions and across different national contexts. These factors seek to explain why, for instance, coalition unionism appears more prevalent in the United States than in the United Kingdom, or in the service industry rather than in blue collar industries (Frege and Kelly 2004a). The article suggests that there are key criteria that help explain when coalitions are likely to develop. Through two case studies it considers how pre-existing opportunities and union choices can influence the formation and quality of coalition unionism that develops. In doing so, the article emphasizes that it is necessary to recognize that different union structures,

identities and actions play a key role in shaping the kinds of coalition practice that develop.

The approach begins with an overview of the terms community and coalition unionism, then suggests a framework of the opportunities and choices that make an individual union more likely to engage in coalition unionism. This framework is then explored and evaluated through a comparison of two case studies – the NSW Teachers Federation's collaboration with the Public Education Alliance in Sydney Australia and the Canadian Union of Public Employees collaboration with the Ontario Health Coalition in Canada.

1. What is Community?

This article begins with the term community because, though a troublesome 'keyword' of sociology, it is a commonly used phrase to categorize coalitions (Williams 1976; Moody 1990). Since the 1990s, the term labor-community coalitions has been the most commonly used phrase in the US to describe coalitions (Brecher and Costello 1990a; Nissen 2004). Alternatively, the term community unionism is sometimes used to refer to coalitions between unions and community organisations (Banks 1992; Tufts 1998; Cutcher 2004; Tattersall 2006a). Yet the term community is also used in discussions of union renewal to define concepts beyond coalition work, such as alternative spaces for union organizing (Baccaro, Hamann and Turner 2003), or a complex set of social networks, whether based on place, identity, culture or common feeling (Massey 1994; Patmore 1994; Thornwaite 1997; Wills and Simms 2004). This multi-purposed definition has not served union renewal literature well.

Although there are competing uses for the tem community, there are three different commonly used meanings across the literature: community as organisation, common interest/identity or place (Tattersall 2006a). Most commonly, the term community is used as a surrogate for the phrase community organisation, for example in the term labor-community coalition (Brecher and Costello 1990a; Tufts 1998; Estabrook, Siqueira and Paes Machado 2000). Secondly community is used to describe a group of people who have common interests or identities, such as a community of women or environmentalists (Heckscher 1988; Cranford and Ladd 2003; Fine 2005a). Thirdly, community is used to mean place, as in a defined geographic area such as a local neighborhood community (Wial 1993; Jonas 1998; Ellem 2003).

These three alternative meanings of community allow us to understand community's multiple dynamics. Combining the concepts of organisation, common identity/interest and place as intertwined and connected opens the way for a richer analysis. While the concept of community is used in three different ways, in practice, community operates as the combination of each of these different meanings. Moreover, this approach to community also provides a concrete anchor for exploring terms such as labor-community coalitions or coalition unionism (Tattersall 2006a). See figure 1.

Figure 1: The threefold dimensions of community (included at end)

By clarifying the multiple dimensions of the term community we can use these three interpretations as a conceptual framework to explore when coalition unionism is likely to form.

2. When is coalition unionism formation likely to occur?

Union strategies rarely develop evenly across national or international union movements; rather many internal union and environmental factors affect when particular strategies unfold. This section identifies a series of factors that may be important for understanding when long term coalition develops.

US social movement theory provides some assistance for understanding the circumstances under which movements develop, which may provide useful lessons for the development of coalition unionism (Voss and Sherman 2003; Turner 2007). Tarrow, McAdams, Tilly and Gamson amongst others have focused on three factors as conditions that lead to social movements: resource mobilisation, political opportunity structure and framing, (Snow and Benford 1988; Gamson and Meyer 1996; McAdam, Tarrow and Tilly 2001). Resource mobilization refers to access to organizational and financial resources; political framing refers to how the movement concern is expressed to mobilize a constituency and publicize its concerns (Snow and Benford 1988; Gamson and Meyer 1996), and opportunity structure stresses the importance of political and environmental factors in social movement emergence (McAdam, Tarrow and Tilly 2001).

Turner has adapted this approach. He firstly focuses specifically on unions, as a distinct type of movement organisation. Secondly, he considers two key concepts – opportunity and choice – categorising the pressures that generate union change as arising from both external pre-existing opportunities and choices internal to unions (Turner 2007).

My approach is located in these traditions. I diverge from Turner's, as my focus is on individual unions, and also I categorise different opportunities and choices using the definition of the term community. In identifying a series of factors that connect to the definition of community I seek to investigate the dialectical interchange between structure and agency that lead to coalition formation and shape the kinds of coalitions that develop (cf Tarrow 2006). I aim to contribute to analysis of how coalitions, as a specific type of social movement unionism and a discrete form of social movement organisation, are likely to form. The aim is to identify the multiple forces that affect union change that can be categorised and evaluated using the case studies below.

2.1 Opportunities

A union's environmental and organizational context shapes the kind of strategies that it is likely to develop. Opportunity structure is a set of signals and processes that make social movement participation possible and plausible (Tarrow 1994, pp. 85-9; Greer, Byrd and Fleron forthcoming). This section explores three key opportunities for coalition unionism, each deriving from the definition of community. It firstly considers the political and economic context (place), then union relationships and structural features (organisation), and finally pre-existing union identities (common interest/identity).

Hostility in the external economic and political environment drives down union density and creates new issues that can spur strategic innovation in unions, including coalition unionism (Hyman 2001; Turner 2007). Firstly, the economic context, including employer power or industrial location may influence the likelihood of coalition practice. Crises such as contracting out, attacks on the public sector, privatization or plant closures, have provoked coalitions because of the common opposition by workers and surrounding communities (Craypo and Nissen 1993; Johnston 1994; Nissen 1995; Reynolds 2002; Tattersall 2006a; Greer, Byrd and Fleron forthcoming). Additionally, labor geographers have argued that a union's industrial location may provide distinct opportunities for coalitions. Industries with a 'spatial fix' tie capital to place. Spatial fixes may derive from government policy, local consumer markets or the immobility of production processes (Jonas 1998; Walsh 2000). This has been identified in primary industries such as mining and particular human service work such as cleaning (Savage 1998; Walsh 2000; Ellem 2003; Ellem 2005). These create rich opportunities for unions operating in those industries, as the spatial fixes enhance the opportunities for re-regulating labor and local community standards in the interests of unions.

Secondly, shifting political and regulatory institutional support for unions may create opportunities for coalition unionism formation. For instance, comprehensive campaigning to win organizing drives including support from community organisation often occurs an alternative or supplementary strategy to slow and employer-friendly regulatory National Labor Relations Board recognition processes (Bronfenbrenner and

Juravich 1998; Savage 1998). Additionally, weakening in union-political party relationships, called 'third way' labor politics in Australia, the US and UK, threaten the traditional routes for union political influence which may lead unions to adopt alternative strategies, such as coalitions (Hyman 2001; Wills 2001; Upchurch, Taylor and Mathers 2006). The demise of these traditional institutional sources of union power may encourage unions to experiment with coalitions as an alternative source of power.

Economic and political crises are important forces in propelling change, and are often singled out as important for causing a shift to coalition practice (Upchurch, Taylor and Mathers 2006). In contrast, this article argues that the factors that shape coalition formation are more complex. In particular, the depth of member engagement and type of coalition unionism that develops is shaped by the other pre-existing opportunities and choices.

A union's organizational structure and relationships may create opportunities for coalition formation. Firstly, internal organizational features of unions, such as a union's size, decentralized member-based participatory structures (such as stewards networks and workplace committees) and member homogeneity may make coalition formation more likely by making member support easier to cultivate and coalition resources more available. Conversely, the context of declining membership in a union may also support coalition practice because it threatens the resources and viability of the union (Banks 1992; Bronfenbrenner, Freidman, Hurd et al. 1998). Moreover, a union's structure may shape the type of coalition that forms by supporting the deep engage union members

(Delaney, Jarley and Fioritio 1996; Levesque and Murray 2002). Secondly, union relationships with peak councils or other unions may support collaboration by creating a culture of alliances that supports individual union engagement (Ellem and Shields 2004; Tattersall forthcoming a). Central labor councils in the US can be agents for change; for example the AFL-CIO's Union Cities program supported coalition practice (Ness and Eimer 2001; Byrd and Rhee 2004; Luce and Nelson 2004; Reynolds 2004). Similarly, community collaboration requires available community allies (Tarrow 1994). Johnson argues that coalition are more prevalent in the public sector, because of it is many where consumer groups operate and often share interests with workers (Johnston 1994; Carpenter 2000).

Finally, pre-existing union identities may also create opportunities for coalitions. Unions with a history of militancy, ideological radicalism or broad interest representation beyond wages and conditions may be more likely to engage in future collaboration (Hyman 1994; Robinson 2000; Obach 2004). Ideologically progressive unions may find it easier to cultivate a common interest with community organisations if they are committed to campaigning on issues beyond wages or conditions (Waterman 1998; Bramble 2001; von Holdt 2002). A union's identity may also be shaped by the membership base of the union, in particular by gender or ethnicity (Needleman 1998b), or by union education programs that increase political awareness (Spencer 1994). Similarly, if union collaboration is a familiar tactic – part of a union's 'repertoire of contention' – then it is more likely to be used as a strategy in the future (Tarrow 1994; Frege, Heery and Turner 2004).

Three distinct types of opportunities may make coalition unionism formation more likely. These opportunities are pre-existing features of either the external political and economic context or relate to the history or characteristics of the union and its surrounding civil society.

2.2 Choices

Alongside existing opportunities, a union must choose to commit to coalition unionism (Kochan, Katz and McKersie 1986; Pocock 1998; Hyman 2001). This section again uses the definition of community to identify three additional factors that make coalition unionism formation likely. These are firstly, the role of different union actors; secondly, the role of issue selection and common interest in the coalition, and thirdly, coalition engagement and organizational scale. These factors serve to broaden an understanding of what causes coalitions to form, as well as potentially shaping the type of coalition unionism that might develop.

Specific union actors are held out as key for causing coalition unionism. Leadership support is commonly said to be critical for organizational change, and thus leadership support for collaboration practice is said to make it more likely to occur (Nissen 2000; Voss and Sherman 2000; Cooper 2001; Frege, Heery and Turner 2004; Crosby 2005; Turner 2007). Alternatively, some argue that 'bottom up' pressures are more important, presenting an idealized picture of rank and file democratic pressure as key for promoting sustained coalitions (Moody 1997; Moody 1999). Rose identifies 'bridge builders' as

another layer of important union actors (Rose 2000). Bridge builders are union officials or stewards who have experience in the union movement and social movements which they use to facilitate coalitions by translating cultural and class barriers (Rose 2000; Voss and Sherman 2000).

A common criticism of this literature is that it identifies a particular agent as primary. However, as Hyman argues unions contain a complex set of relations, decision making bodies and political forces that all influence the development of strategy (Hyman 1975; Hyman 1989). The case studies provide an opportunity to explore the relative affects of different union actors in coalition formation and how they influence when coalitions form, and the kinds of long term coalitions that are sustained (Tattersall 2005).

While the issue of organizational support allows us to examine individual agents of change, the ability to cultivate member or leadership support is affected by the choice of issues and the capacity for multi-scaled collaboration, which are considered below.

Whether a union decides to participate or form a coalition is shaped by whether the issue selected connects to union members. That is, whether the common interest at the heart of the coalition connects to the direct interests and lived experiences of union members (Wills 1998; Tattersall and Reynolds 2007c). This may be the case where the issue relates to industry-wide concerns that affect workplace members, a widely-held non-workplace identity or where the issue relates to union bargaining or workplace conditions (Nissen 2004; Tattersall 2006a).

The type of union member engagement in an issue-based campaign, in particular whether engagement is shallow and leadership based or deep and connected to members, also relates to the types of coalition and union structures that connect union members to the coalition. If common interest tries to predict the breadth of union support for coalition formation across the union, then organizational scale seeks to understand the degree to which rank and file members are engaged in the coalition campaign.

Coalition formation and participation can originate and operate at a variety of organizational scales, that is, at a variety of different levels in the union – such as the union office, executive, regional committees, workplace or in locally-scaled coalition structures. The location of coalition engagement shapes the likelihood of formation and the depth of member engagement. It is very common for coalition formation and participation to focus on the union office and union leadership where membership participation is minimal (Clawson 2003; Tattersall 2005). Conversely, local membership engagement in coalition activity may relate to the physical location of union stewards and the surrounding political and place consciousness (Ellem 2003). Local membership engagement may also be easier to cultivate if the coalition that is formed is multi-scaled, and has decision making and participatory structures that operate at a local as well as at the scale of the union office (Tattersall 2006c).

2.3 Factors in coalition formation

This section identified six factors that contribute to shaping when coalition unionism is likely to form. They included three pre-existing external and organizational opportunities and three distinct choices made by an individual union. These factors are outlined in Figure 2.

Figure 2: Factors that shape coalition formation (included at end)

Three findings can be drawn from this framework. Firstly, the collection of factors suggest that coalition unionism formation relates directly to the existence of community-based opportunities that derive from a union's surroundings, identity and structure as well as community-related choices that connected to the types of union actors engaged in the coalition, the coalition issue selected and the types of decision making structures associated with coalition activity.

Secondly, in suggesting this multiplicity of factors, the framework emphasizes that it is a dynamic exchange between opportunities and choices that leads to coalition formation. The extent to which of these factors are more significant and how they interact will be explored in the case studies.

Thirdly, the framework identifies that not only do particular opportunities or choices help indicate when coalition unionism is likely to form but they also influence the kinds of coalition unionism that are likely to result. Whether a coalition is likely to be leadership driven, connected to the membership and potentially sustained long term relates to

opportunities such as pre-existing union structures such as steward structures, and choices such as union agents, issue selection and how union members participate in coalition decision making.

3. Case Studies

These six factors of coalition unionism formation explored through a comparison of two case studies in Australia and Canada respectively. These studies are used to suggest how the different factors are likely to interact overtime to produce coalition formation and shape the type of coalition that develops.

3.1 Research Approach

The case studies were undertaken using a combination of document analysis, participant observation and interviews between December 2004 and November 2006. The cases were selected because they shared several similarities: they involved public sector unions, the coalition lasted over four years, the coalitions engaged in campaigns inside and outside of elections, and they were located in global cities (Sydney and Toronto). In Sydney and Toronto the coalitions were selected after a survey of union organizers who were asked to identify the most successful examples of coalition unionism. The study of the NSW Teachers Federation was undertaken between September 2004 and May 2005, involving 42 interviews with union officials, organizers and stewards as well as community organisation participants. Participant observation was undertaken at all union forums, including steward training, State Council meetings and teacher association meetings. All internal documents, union meeting minutes and newsletters were reviewed

as well as newspaper articles from 1999 to 2004. The study of the Canadian Union of Public Employees was undertaken between November 2004 and November 2006, and involved 32 interviews with community organization participants and union organizers and delegates; participant observation of coalition forums and assemblies; a review of newspapers from 1998 to 2006 and unlimited access to the Ontario Health Coalitions archives. Interview data from each study was electronically coded, and analyzed with reference to the six factors identified above.

3.2 NSW Teachers Federation (NSWTF) and the Public Education Alliance, Sydney Australia

The NSWTF is the largest public sector union in NSW, representing teachers in the public education school system (O'Brien 1987). The union has strong density, with over 84% of full time teachers in the union (White 2004).

Before the formation of coalition unionism in 2001, the NSW Teachers Federation had an identity and structure that created opportunities for the formation of coalition unionism. The union had a history of advocating for issues such as peace and feminism, and campaigning in coalition with parents on issues of public education (O'Brien 1987). Indeed, the NSWTF, the Federation of Parents and Citizens (P&C) and the Federation of Community Organisations (FOSCO) have, since WWII, met as the Three Federations, to report on issues of concern and priority to each other as an ad hoc coalition. The structure of the union is decentralized and the union runs a comprehensive training program of all union representatives. The union has a 300 person rank and file council

that meets eight times per year and over 2000 union delegates and 2000 women's contacts, one in each school across the state (Federation 2005). The union has a regional structure, with over 150 regionally-based teacher associations that meet monthly.

Despite these strengths, the union found itself in an escalating crisis in the mid-1990s as public education funding was cut and the union was increasingly unable to affect that agenda. In the 1990s ideological and financial attacks on public education occurred at a federal and state level.[1] Federally, the economically liberal, socially conservative Liberal-National Coalition government privileged private education and shifted of funds to private schools (Watson 2004). At a state level, which is responsible for school regulation and teacher pay, the pressure to reduce budget deficits prompted school restructures and a need to reduce recurrent expenditure – the greatest item being teacher wages (interview, former Minister for Education, 2005).

The funding crisis directly challenged the NSWTF. According to the union, 'tense and aggressive' salary battles developed over the 1990s, 'with condition stripping [the removal of workplace conditions such as leave from the bargaining contract] becoming the basis for contract negotiation' (interview, O'Halloran NSWTF President, 2004). This conflict escalated in the 1999 salaries campaign. For example, the popular Sydney Murdoch tabloid, *The Daily Telegraph* ran a front page campaign attacking the NSWTF's wage claim, culminating in a front-page article featuring a cartoon of the NSWTF

[1] In Australia, State and Federal Governments are responsible for education funding, with the State Government primarily responsible for running the public school system.

President drawn wearing a dunce's cap with the slogan 'if the cap fits!' (Daily Telegraph 1999).

This challenges posed by the salaries campaign were felt directly by teachers. According to organizers, there was a sense that teachers 'were being denigrated by talk-back radio' (interview, NSWTF Organizer 4, 2005). Organizers recalled members contacting them 'worried and angry' about the 'berating' of teachers on talk-back radio (interview NSWTF Organizers 4, 6, 7 2005). This despair sometimes resulted in anger at the union, particularly that the NSWTF did not have a sufficient media presence, with motions moved at union state council meetings calling for it to investigate a more effective media strategy (interview, NSWTF Official 2, 2005; O'Halloran, 2004).

A group of organizers and delegates, all located in South-Western and Western Sydney, and all in a similar loose faction within the union, began strategizing about how to shift the union's capacity. This area of Sydney is socio-economically disadvantaged. At the same time, an organizer, Zadkovich, wrote a paper calling for a series of internal reforms that would support 'social movement unionism', inspired by a study trip overseas (Zadkovich 1999). This group became an agent of change within the union. The group proposed three key structural changes to the union's organisational capacity and relationships: firstly, a fund for public education campaigns, secondly a new strategic relationship with principal groups and thirdly the formation of local public education lobby groups.

Initially, the group proposed a public education fund and public education social frame, aimed at establishing a dedicated pool of money that could be used solely for proactive campaigns around promoting public education. Working off widespread member anger around media messaging and the inability of the union to get its 'message out' (interview 19: NSWTF, 2005), delegates from south-west Sydney moved a motion at the 1999 Annual NSWTF Conference calling for the formation of a public education fund – a compulsory membership fee that would create a dedicated union resource for public education campaigns (NSWTF 1999b). This motion captured member interest in an improved media strategy, but allocated resources not simply to union advertising but to the 'formation of a broad-based public education campaign agenda' (interview, organiser: NSWTF, 2005). The result of the motion was that from 2001 the union reframed all its campaigns as campaigns for public education, supported by a new pool of funds (interview, O'Halloran: NSWTF, 2005).

Next, the western Sydney group argued that the NSWTF needed to recast its outlook on principals as allies in public education campaigning. Previously, while principles were NSWTF members, the NSWTF did not have regular formal meetings with the principal organisations. However, in western Sydney union organisers had built strong relationships with a newly formed radical principal group. These NSWTF organisers advocated for the 'reformulation of their understanding of principals', believing that principals 'needed to be seen as school leaders rather than employers' (interviews 7, 27: NSWTF, 2005). This shifting role was accepted by the leadership through several internal debates during 1999 and 2000.

The successful repositioning of the role of principals led to a third change in the NSWTF: the formation of public education lobbies in the local federal electorates around the state. Public education lobbies were local organisations led by a locally-based parent, principal and teacher. This idea received tacit support from the leadership, but gained significant momentum after a series of local forums on public education, first in Campbelltown and Liverpool in 1999 which attracted 600 people, then in Mt Prichard in 2000 that attracted 750 people (interview 19: NSWTF, 2005). The idea was to establish local participation and advocacy for public education to supplement the centralised power of the union, so locally-based teachers, parents and principals could lobby local members of parliament.

Thus, as a consequence of a crisis in union capacity created by major funding cuts and attacks on teachers, the NSWTF realigned its relationship with principals, created a multi-scalar capacity for action on public education and built a resource base and broad social frame on which to initiate changes to the public education system from 2001.

The greatest achievement of the NSWTF's coalition unionism was the 'Vinson Inquiry' – an independent inquiry into public education run by the NSWTF and parent groups. This was a deep kind of coalition that extended from the rank and file to the leadership of the union (Tattersall 2006a). Local union support for the Inquiry was widespread given the preceding debates and agitation for coalition unionism. The 1999 union restructuring was also important because the Public Education Fund had amassed over $1 million which funded the Independent Inquiry. The union leadership was actively committed to

the campaign: Deputy President O'Halloran who was responsible for the day-to-day affairs of the Inquiry, was later elected President in late 2002 (interview 4, 6: NSWTF 2005). The issue of public education deeply connected to teacher's concerns as professional educators, and engaged them about how to repair the system (interview 5: NSWTF, 2005). As O'Halloran described, the Inquiry 'touched the middle teacher who normally doesn't get involved in their union' (interview, O'Halloran, 2004). The campaign was connected to members through the union's decentralized structure. It was regionally-based organizers, regional teachers associations and local school delegates who coordinated school visits, public meetings and media interviews as the Inquiry's head, Tony Vinson, toured the State promoting and investigating the issue of public education (interview, Irving, NSWTF Official, 2005).

However, the coalition unionism was not sustained at this pace or depth. Two years after the Inquiry, the coalition with the parent groups declined. At this time the union moved into a campaign on salaries and while it continued to use the frame of public education, the goals were limited to wages claims. Union member engagement in this campaign remained strong, but the community organisation relationships shifted. A new leader was elected in the parent group who prioritized a relationship with Government, rather than the union, taking away a traditional ally (Parker 2002; Wood 2002). Furthermore, during the salaries campaign the union moved away from community based events and into traditional industrial activity, organizing itself around the Industrial Relations Commission hearings with rallies that sought to influence the IRC and the Government (Tattersall 2006a). The union did not sustain the regular parent-principle meetings that

had occurred during the Inquiry, and these coalitions fell away. More recently coalition work has rekindled, but not yet to the magnitude, depth or policy success that was achieved during the Vinson Inquiry.

3.3 Canadian Union of Public Employees (CUPE) and the Ontario Health Coalition (OHC)

The Canadian Union of Public Employees is the largest union in Canada. Its members are the general staff of the public sector, including non-clinical hospital workers. It is one of seven unions in health care.[2]

Similar to the NSWTF, CUPE's internal decentralized structure and union identity created opportunities for coalition unionism. CUPE has two central Ontario-wide leadership units: a central office led by President Sid Ryan and the Ontario Council of Hospitals (OCHU), a bargaining unit for hospitals led by President Michael Hurley. Underneath are CUPE's locals; which are separate union branches, often based around workplaces or regional areas (interview, CUPE Official 3, 2006). CUPE's identity also predisposes it to coalition unionism. As its President described, it is a 'left, nationalist, social union,' regularly campaigning beyond wages and conditions in alliance with the labor party (the New Democratic Party) and social movements (interview, Ryan: CUPE, 2006).

[2] Other unions in health care include traditional health care unions such as the Ontario Nurses Association, Ontario Public Sector Employees Union and the Service Employees International Union, as well as less traditional private sector unions such as the Canadian Auto Workers, who have come to represent health care workers in a context of union competition.

Despite these pre-existing features, it was not until the Ontario Health Coalition reformed in response to expanding attacks on public health care that CUPE engaged in long-term health care coalition work. The Ontario Health Coalition was first formed in the early 1980s, and rekindled in December 1995 by the Ontario Federation of Labor to respond to pressures for privatization and hospital closures (Tetley 1995). At first, CUPE's participation in the coalition was relatively limited. CUPE registered as a member, sent a research officer to OHC Administrative Committee meetings, made financial donations and was an ad hoc participant at campaign events (interview, CUPE Official 4, 2005).

In 2002, CUPE's coalition engagement deepened in response to a major political crisis that created a campaign opportunity for the OHC. In early 2002, a public campaign for privatization of health care intensified, with conservative government pronouncements that Medicare was unsustainable (Mackie 2000; Fraser 2001; Kirby and Le Breton 2002). Then, an opportunity arose when the Liberal Federal Government announced a Royal Commission into Health Care, charged with investigating the viability of universal health care in Canada.

In April 2002 the OHC, led by CUPE, embraced a radical strategy to support public Medicare by 'canvassing the Province', taking a petition about health care from door to door (Mehra 2005). The idea came from Ross Sutherland, a member of the Kingston Health Coalition and a CUPE activist. As a bridge builder between this local community group and the union, he took his idea to Sid Ryan, the leader of CUPE. Ryan's supported the idea because Sutherland was a trusted and influential union activist, and because the

idea was consistent with Ryan's beliefs about social union strategy (interview, Ryan: CUPE, 2006). Following this, the mass canvas proposal supported internally by CUPE's health care council, and then taken by CUPE to the Administrative Committee of the OHC where it received broad support (interview, Harris: OFL, 2006).

CUPE participated in the canvas which was a dramatic OHC success, courtesy of local health coalition volunteers and union institutional support. Through over 55 local coalitions, the OHC collected over 300 000 signatures on petitions (Mehra 2005). Yet the campaign was driven by local coalition volunteers, with union participation remaining centralized. CUPE organized for a dozen union stewards to be paid off work to work with the coalition, who helped prepare the canvas, and provided financial support; but the union did not engage many members in the campaign (interviews, local coalition participants 1, 2, 6, 7, 2005). One local group recalled trying to get a CUPE volunteer to call around CUPE members, but was unable to access a list of union members from the local union leadership (interview, local coalition participant 2, 3, 2005). Where there was significant union participation, it occurred in places with a history of union campaigning where the volunteer activist base was rooted in the unions, where trust had been cultivated between the health group and the union (interview, local coalition participant 4, 5, 2005 and 2006). This trust tended to be a product of bridge builders, where local union activists were active participants in the local health groups and able to broker requests between the two groups (interview, local coalition participant 3, 6, 2005).

It was not until the OHC's next campaign – against the privatization of hospitals – that CUPE's leadership within the coalition translated into local union support. In December 2002, Ontario's Conservative Government announced that it would build two hospitals as public-private-partnerships (P3s) (OHC 2003a). P3 hospitals are privately built, privately administered hospitals where non-clinical services are contracted out. P3s were a central concern for CUPE because they directly threatened the employment standards of CUPE hospital workers (interview, Allen CUPE, 2005). The issue of privatization was actively opposed by the union leaders, particularly the President of the hospital division Michael Hurley. According to a CUPE researcher, leadership commitment to the issue of privatization was the key ingredient in intensifying union commitment to the coalition and its campaign (interview, Allen CUPE 2005).

Moreover, the direct engagement of the leadership in the campaign was harnessed to generate local union engagement. This occurred in two ways – through the role of coalition tactics, and through direct union leadership intervention into the campaign. Firstly, tactical events held by the OHC created opportunities for CUPE's provincial leadership to encourage its local union branches participate. For instance, in the town of Brampton in 2002 a large 3000 person rally was predominately a rally of union members. Secondly, Hurley's direct engagement had a ripple affect on union participation. In 2003-4, the OHC organized a series of province-wide tours to educate coalition supporters about P3s (interview, Mehra: OHC, 2005). Hurley believed CUPE's relatively large union member participation 'was partly a function of the union structure' (interview, Hurley, 2006). In contrast to other unions 'which have one provincial local

and centralized resources we have a local structure where locals retain half the money', which allowed CUPE to bring a local tour to local unions, and directly engage local participation at the same scale (interview, Hurley, 2006).

Yet CUPE's local union engagement across the province was uneven. Hurley and CUPE organizers explained this as varying according to a mix of structural factors, geographical context and the level of interest by local union activists. Structurally, participation was higher when the local had paid officials, it relied on those officials being supportive of the coalition work and how well organized the local was (whether they had a strong steward network or had been through training) (interview, local coalition participant 6, Ryan, Hurley: CUPE, 2006). Geographically, union and coalition engagement was easier and deeper in smaller cities, cities with large hospitals or cities with a history of union campaigning (interview, Hurley, Ryan: CUPE, 2006). Union actors also played a role, because where there were union presidents with an ideological commitment or union stewards who were participants and bridge builders in the coalition, union participation in coalition events was stronger (interview, Hurley: CUPE, 2006).

This pattern of union participation changed during 2005, where the OHC developed an intense local plebiscite campaign that further deepened union participation. Community run referendums were hosted in cities where P3 hospitals were planned (interview, Mehra, OHC, 2005). Between May 2005 and May 2006, six plebiscites were held with over 80 000 people voting against closures (OHC 2005f). The locally-scaled nature of the plebiscite campaign shifted coalition resources to a local scale and directly engaged

union members as volunteers. Union engagement varied, with union participation greatest in smaller cities, and where union locals faced a direct crisis prompting participation. For instance, the first plebiscite in St Catherines occurred just after a jurisdictional battle involving CUPE. This context propelled CUPE 'to be visible' and created 'a motivation for part of the local union' in that area' (interview, union 3, 2006). The St Catherine success was also enhanced because the main local health coalition coordinator was a unionist, and could bridge between union conflicts and the coalitions (interview, local coalition participant, 8, 2005).

3.3 Evaluation

This case studies of coalition unionism formation gives new meaning to the term coalition formation, highlights the relevance and dynamic interaction between the opportunity and choice factors, suggests the primary importance of coalition agents and union identity in union formation, and notes the effect that coalition formation has on member engagement in coalition unionism.

Differences between the studies provide a guide to understanding the concept of 'coalition formation.' Firstly, the passage of coalition formation is a rich dialectic of internal circumstance and external environment. While the NSWTF case study was an example of a union forming a coalition in light of an external political crisis combined with union actors who strategized and won majority support for a coalition response; CUPE's passage of coalition formation was a product of both a crisis and the opportunity

of the Ontario Health Coalition – a coalition structure through which CUPE could respond to its internal crisis.

Secondly, the concept of coalition 'formation' needs to be understood as a dynamic process that changes over time. While a union may at a particular conjuncture 'choose' to engage in a coalition, the nature of its engagement is constantly affected by organizational and common interest factors. CUPE's engagement in the coalition qualitatively shifted over time due to the mutually reinforcing circumstance of the issue of privatization which led to leadership engagement, which further committed the union to engage its membership in the coalition and the public-private-partnership campaign. Similarly, the NSWTF's shifted away from coalition unionism when it turned to use a court-like structure for contract negotiation and its available community ally moved away from the union. If the concept of formation is understood only as a static concept, then the shifting commitment and coalition engagement of CUPE or the NSWTF is lost.

More broadly, the case studies suggest that coalition engagement involves a robust interaction between opportunity and choice within each of the community factors. In terms of place, the NSWTF's salary crisis generally, and the specific effects of that crisis in the south west of Sydney, generated support amongst a class of union actors who pushed to for a coalition strategy. In terms of organisation, the opportunities of the NSWTF's size and its public education fund, and CUPE's available community ally in the OHC created the basis for a potential coalition on issues of mutual self-interest (such as privatization or public education). Finally that both CUPE and the NSWTF had broad

union identities and decentralized union structures provided a framework for enabling these coalition campaigns to take root amongst the membership.

The case studies also provide some suggestions as to what factors may be primary in leading to coalition engagement. These include the opportunities of crisis and union identity, the role of coalition agents and the importance of common interest.

Firstly, political and economic crisis was important in each study. The crises were severe and threatened to affect the membership and the ability of the union to go on as before. The crisis of the NSWTF 1999 salaries campaign generated pressure for organizational change, as did the threats of privatization for CUPE.

Secondly, the cases suggest that coalition formation may be more likely when there is a broad union identity. Both the NSWTF and CUPE had an established commitment to campaigning beyond wages and conditions. While this does not imply that a wide union identity is a pre-requisite for coalition practice, it does suggest that it may make coalition formation a readier strategy.

Thirdly, the presence of individuals committed to coalition formation is vital, but that they need not be located inside the union. In the case of the NSWTF, the coalition was union-initiated and resourced by individual union leaders, organizers and officials. Yet for CUPE, it was the coalition itself that was the primary agent for engaging the union, and then deepening the union's engagement. The OHC had significantly more

independent resources than in the public education alliance, with a separate coalition office, a larger number of contributing unions and a paid independent coordinator. It also had a growing number of locally based health coalitions which were resourced with local volunteers. These independent resources attracted union participation, and then when an issue arose that was in the mutual self-interest of CUPE, the union engagement intensified. Later, it was the local organisations of the coalition and OHC's local plebiscite campaign that further deepened union participation by taking campaigning to a scale closer to the membership.

Fourthly, the cases suggest that mutual interest connection between the union and the coalition is a significant factor in coalition formation. Coalition formation, and union member engagement was affected by the common interest connection between the coalition, union and union members. For the NSWTF, the issue of quality public education, and in particular reducing class sizes, was directly in the interests of teachers. For CUPE, the connection to health care was important; however it was privatization that enhanced union participation, where there was a direct connection between the coalition and employment standards.

Finally, the case studies demonstrated that the process of coalition formation shapes the type of coalition unionism that develops by affecting the degree to which members are engaged in the coalition. Decentralized steward structures were necessary but not sufficient for developing member-engaged, deeper forms of coalition unionism. While both the NSWTF's teacher associations and CUPE's locals provided opportunities for

member participation in the coalition unionism, steward participation only occurred when these structures were also activated by willing union activists. In the NSWTF, the coalition unionism developed first as a movement inside the union which became institutionalized through leadership support, resulting in a deep and 'whole of union' commitment to coalition unionism. In contrast, for CUPE, the union was brought into the OHC by its leadership. Leadership support intensified over time, particularly as the issue agenda of the coalition – privatization – aligned with the union's own strategic interests. Eventually, a deeper form of union engagement developed as the OHC shifted its strategy to a local scale – engaging in plebiscites of local towns. At this local scale CUPE's union locals intensified their commitment beyond individual events, committing to the strategic development of the local plebiscite campaign.

Comparing the studies demonstrates that while leadership is necessary for coalition unionism, it is not sufficient to create deep union engagement. This finding significantly contrasts with the common wisdom in the 'shift to organizing' literature, which often argues that leadership change is the most important factor for creating change. In each case leadership combined with either pre-existing member agency or an independently resourced, multi-scalar coalition that created the capacity for deep union engagement.

Moreover, the studies suggest that deep coalition practice is likely to develop through a rich interaction between opportunities and choice. Member engagement in each coalition required the pre-existing opportunity of decentralized union structures, yet it also required the activation of these structures by locally scaled union agents who connected

those structures to the coalition. For the NSWTF, it was the south western Sydney activists who launched the local public education meetings, for CUPE it was the bridge builders who connected the local health coalitions to the union or the ideologically committed activists who did the contact work to get other union members to participate in coalition events. Deep coalition engagement was build through a dynamic relationship between organisation and movement at a local scale (Flanders 1970).

4. Conclusion

This study explored coalition unionism with the purpose of identifying common factors that shape when coalitions are likely to form, and how the process of formation shapes the kinds of coalition unionism that result. It presented several factors to help scholars and unionists understand when coalitions are likely to develop, and then explored relationships between those factors. It suggested that the different interpretations of community provide a useful way for understanding the factors and structuring the dynamics opportunity and choice in coalition formation.

This approach to coalition unionism contributes to analysis of union renewal and social movement unionism, which often assumes that coalitions are likely to occur as part of union change rather than identifies when this is likely to happen. It seeks to expand union renewal analysis in a way that strengthens its ability to explain why certain unions are more likely to renew than others. This can enhance our understanding the patterns of union renewal we have seen and are likely to see in the future.

Understanding the patterns of coalition formation allows scholars and practitioners to identify the union structures and conditions that may make coalition practice more likely to occur. The role of decentralized union structures and committed local union activists in coalition formation (and in particular the practice of deep coalitions) suggests that union education and politicization are important prerequisites for coalition practice. It suggests that campaigns on issues that connect to the union's mutual self-interest will be much more likely to develop into coalitions than issues that do not attach to a common interest felt by the union's membership. While the study emphasized that political and economic crisis and leadership support are important, it emphasized that there are other important factors that lead to the development of coalition strategies, and most important is the rich dialectic across opportunities and choice that leads to coalition formation.

This article also suggests that union renewal is part of a broader political project. Rather than seeing renewal as simply a means for achieving union growth, the article puts forward that coalitions as a strategy can have positive effects on the union as a whole. The unions in these case studies used coalitions not simply as a means for growing union density, but to build a political agenda around issues in which they shared a common interest. Campaigns such as these suggest that the objectives of social movement unionism are broader than rejuvenating the organizational structures of unions, but are also designed to agitate for a political agenda that serves the broad common interests of union members and their community organization allies.

This article has argued that coalition unionism is not a random act, but a union strategy that is more likely to occur given the presence of certain pre-existing opportunities and internal union choices. The concept of community allows for the identification of six important factors that can lead to coalitions, and enhances our understanding of the dialectics between them. The study found that the combination of factors that cause coalition unionism to develop directly impact on the degree of member engagement in the coalition unionism that develops. The article emphasizes that coalition unionism formation must be understood as a dynamic process, where coalition unionism is not understood as an end in itself, but as a variable process of organizational and political change.

Figures

Figure 1: The threefold dimensions of community

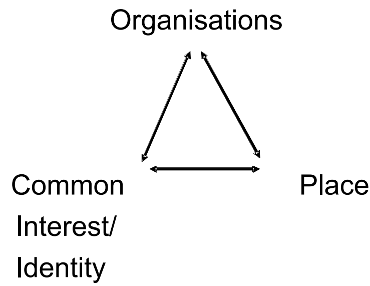

Figure 2: Factors that shape coalition formation (included at end)

	Opportunity Factors	**Choice**
Place	Political and economic context (eg.economic crisis; spatial fixes; regulation; ·Union-party; relationships)	Union actors (eg. Leadership, rank and file, bridge builders)
Organisation	Organisational relationships and features (eg. Union size, density, peak councils, available community organizations)	Union common interest (eg. issue selection and connection to members)

Common interest and identity	Union identities (eg. Broad union identity; non-work identities in membership; union education; history of coalitions)	Organisational scale (eg. how the union is connected to decision making structures)

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