

## Article

# Strategic Electoral Dilemmas and the Politics of Teachers' Unions in Ontario

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## Abstract

This article seeks to explain both convergence and divergence in Ontario teacher union electoral strategy. After coalescing around a strategy of anti-Progressive Conservative (PC) strategic voting beginning with the 1999 provincial election, Ontario's major teachers' unions developed an electoral alliance with the McGuinty Liberals designed to advance teacher union priorities and mitigate the possibility of a return to power for the PCs. The authors use campaign finance and interview data to demonstrate that this ad hoc partnership was strengthened over the course of several election campaigns before the Liberal government's decision to legislate restrictions on teacher union collective bargaining rights in 2012 led to unprecedented tension in the union-party partnership. The authors adapt the concept of union-party loyalty dilemmas to explain why individual teachers' unions responded differently to the Liberal government's efforts to impose austerity measures in the education sector.

## Résumé

Cet article vise à expliquer les convergences et divergences au sein des stratégies électorales des syndicats enseignants en Ontario. Après s'être ralliés à une approche de vote stratégique contre le Parti progressiste-conservateur (PPC) à partir des élections provinciales de 1999, les principaux syndicats enseignants de l'Ontario ont par la suite développé une alliance électorale avec les Libéraux de McGuinty afin de faire avancer leurs revendications et éviter un retour au pouvoir du PPC. Les auteurs s'appuient sur des données de financement des campagnes électorales ainsi que des entrevues afin de démontrer que ce partenariat ponctuel a été renforcé au cours de plusieurs campagnes électorales jusqu'à la décision du gouvernement libéral de faire adopter, en 2012, des restrictions aux droits de négociation collective des syndicats enseignants, conduisant ainsi à des tensions inédites au sein de cette alliance syndicats-parti. Les auteurs adaptent le concept de dilemmes de loyauté syndicat-parti afin d'expliquer pourquoi des syndicats enseignants ont répondu différemment aux efforts du gouvernement libéral d'imposer des mesures d'austérité dans le domaine de l'éducation.

**Keywords:** unions; education; elections; Ontario; strategic voting

**Mot-clés :** syndicats; éducation; élections; Ontario; vote stratégique

## Introduction

Teachers' unions<sup>1</sup> have emerged as one of the most potent political forces in Ontario politics. While these unions have used a variety of strategies and tactics to exert political influence, anti-conservative strategic voting has proven central to the electoral focus of teachers' unions dating back to the 1999 provincial election. From 1999-2014, this particular strategy necessitated the establishment of an ad hoc alliance with the Ontario Liberal Party as the electoral vehicle best positioned to block or defeat Progressive Conservative (PC) candidates. Teachers' unions credit this strategy with helping to elect Liberal governments in 2003, 2007, 2011, and 2014. The electoral alliance between teachers' unions and the governing Liberals, however, developed cracks in 2012. The

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government's decision to pursue austerity measures was viewed very unfavourably by education workers. When the government forced the issue through legislation, its union partners were forced into a loyalty dilemma.

The province's three major teachers' unions responded to the loyalty dilemma in different ways. The Ontario English Catholic Teachers' Association (OECTA) quickly made a deal with the government to avoid imposed terms and remained more or less loyal to the Liberals in electoral terms. The Ontario Secondary School Teachers' Federation (OSSTF) was more vocally opposed to the government and came closer to breaking ties with the party, but ultimately maintained the alliance through continued support for strategic voting. Only the Elementary Teachers' Federation of Ontario (ETFO) severed ties, but only temporarily. Once the Liberals emerged as the only viable electoral alternative to the Hudak Conservatives in the subsequent 2014 provincial election campaign, weaker ties were re-established. However, ETFO jettisoned the relationship altogether once the Liberal Party's electoral fortunes soured in the run up to the 2018 provincial election.

In this article, we apply Katrina Burgess' (1999) concept of party-union loyalty dilemmas to explain why individual teachers' unions responded differently to the provincial government's efforts to impose austerity measures in the education sector.

### **Theoretical Approach**

Various theoretical approaches have been applied to the study of union-party relations with a great deal of emphasis on social democratic parties given organized labour's longstanding links to such parties around the globe. The scholarly literature yields four theoretical strands. The first is rooted in a transactional understanding of politics wherein unions and parties operate with a view towards utility maximization (Archer, 1990; Quinn, 2002). In short, this approach treats unions and parties as rational actors engaged in a mutually beneficial exchange. Unions are expected to use their resources and mobilize their members to elect pro-labour parties and, in exchange, pro-union governments are expected to deliver on labour's public policy priorities. The second offers "ideological affinity" as the explanatory glue that holds together union-party alliances (Jansen and Young, 2009). In their study of NDP-union relations, Jansen and Young (2009) argue that despite the adoption of campaign finance reforms banning union donations to federal political parties, the party maintained its cooperative links to the labour movement because of a joint ideological commitment to social democracy. In a response to Jansen and Young, Pilon et al. (2010) challenge many of the assumptions associated with their "ideological affinity" approach, and instead offer up critical historical institutionalism as the lens through which to understand both stability and change in union-party relationships. The critical institutionalist approach, which also takes on comparative dimensions (Callaghan, 2002; Moschonas, 2002), draws on strands of political economy and historical institutional theory to focus on the dialectical interplay between institutional structures and social dynamics over time. According to Pilon (2015: 6), it is critical institutionalism's "focus on relations – and the power inequities they embody – that allows us to explore why things are happening, why critical junctures are emerging when they do, or why paths remain dependent for various actors." The fourth body of literature is rooted in economic determinism with a focus on how macroeconomic shifts influence and alter union-party relations. Piazza (2001), for example, argues that centre-left parties have jettisoned their

close ties to organized labour because increased global capital mobility has hollowed out the membership of trade unions and severely diluted the importance of workers' organizations as an electoral base.

Burgess' (1999) concept of party-union loyalty dilemmas combines insights from these various theories of union-party relations. Specifically, she relies on macro-economic shifts and economic determinism arguments to contextualize her case studies, underscores the importance of utility maximization as the central goal of party-union alliances, and draws on critical historical institutionalism and ideological affinities to demonstrate how party-union relationships are heavily mediated and coloured by a range of factors including historical legacies. Her concept of loyalty dilemmas, which reinterprets Albert Hirschman's (1970) model in *Exit, Voice, and Loyalty*, posits that unions are faced with having to choose between norm-based voice, norm-breaking voice, or exit strategies when their loyalty is tested through hostile policy decisions by nominally pro-labour governments. For the purposes of this article, we adapt Katrina Burgess' framework for understanding party-union relations in Venezuela, Mexico, and Spain and apply it vertically (cross-level) and horizontally (cross-context) to party-teacher union relationships in Ontario.

On one end of Burgess' continuum, *exit* refers to the abandonment of a strategic electoral alliance. On the other end, *norm-based voice* attempts to preserve the alliance through reliance on a set of strategies and tactics that "conform to the norms that have emerged to govern the management of negotiation and conflict in the alliance" (Burgess, 1999: 113). These could include, for example, ad hoc arrangements to mitigate the negative effects of policy divergence. In between these extremes lies the option of *norm-breaking voice*. This involves a breach of the norms and understandings that underpin electoral alliances without resorting to a full dissolution of the party-union relationship. Burgess (1999: 113) explains that *norm-breaking voice* does not "dispense entirely with the regularized patterns of interaction that have historically served these leaders so well. It is only when this kind of voice falls on deaf ears that labor leaders are likely to resort to exit."

According to Burgess (1999: 107-110), how unions respond to pro-labour government actions viewed as contrary to union interests is largely dependent on the reserves of loyalty built up between the governing party and its union allies. Such reserves can be accumulated through a variety of means, including strong personal relationships among party and union leaders, utility maximization or future expectations of mutually beneficial exchange, shared ideological affinities, or longstanding adherence to relationship norms and principles designed to build trust.

With regard to loyal behavior, alliance principles and norms create "claims" on the loyalty of each alliance participant. If disaffected labor leaders limit their resistance to norm-based voice, they are respecting the loyalty claims of the party. Once they move into norm-breaking voice, they begin violating these claims and thereby behave disloyally toward the party. Crossing the threshold into exit constitutes the ultimate act of disloyalty because it brings about the collapse of the alliance (Burgess 1999: 117).

There is no question that teacher union electoral strategy in Ontario has been primarily externally driven. The province does not have a strong history or tradition of tripartite social dialogue with organized labour. Neoliberal government restructuring and attacks on

teacher union rights and entitlements in the 1990s politicized education workers in an unprecedented way and propelled them into the forefront of Ontario politics (Hanson, 2013; Sweeney, 2013). This general observation, however, obscures important variations between teachers' unions and local nuances related to union leaders' understandings of the broader strategic and historic context. The case of teachers' unions in Ontario is unique insofar as these unions have never maintained official institutional relationships with political parties, social democratic or otherwise. While the New Democratic Party (NDP) has historically been regarded as labour's party in the Canadian context, this label is certainly contested. In the case of Ontario, unions have been deeply divided over strategy and political allegiances, with a significant segment of the labour movement actively backing Liberals over New Democrats as part of multi-partisan anti-Conservative strategic voting campaigns between 1999 and 2014. Teachers' unions and building and construction trades unions, in particular, have been key labour allies of the Ontario Liberals (Walchuk, 2010). And because teachers' unions punch well above their weight in the realm of financing political action, their influence has been magnified relative to their size (Savage and Ruhloff-Queiruga, 2017: 266).

Thus, teacher union commitments to "loyalty" in this context are very much shaped by utility maximization in terms of policy and election outcomes rather than any sense of solidarity or social democratic ideological affinity. As a result, the dynamic of these party-union relationships is slightly different than the case studies examined by Burgess, which featured longstanding and institutionalized links between governing left parties and unions in Mexico, Spain, and Venezuela, respectively. Nevertheless, Burgess' framework is flexible enough that it can be applied to a wide range of comparative party-union relationships, and in this case, different unions within the same sub-national jurisdiction.

## Method

The novelty of our approach lies in the integration of campaign finance and qualitative interview data into the analysis. Relying on third party spending data from Elections Ontario and the union campaign contribution data set produced by Savage and Ruhloff-Queiruga (2017) for their study of unions and strategic voting, we uncover how teachers' unions, both individually and collectively, have intervened in election campaigns.<sup>2</sup> We also rely on qualitative data from 21 semi-structured interviews with former and current leaders and staff from every major teacher union in the province. Interviewees, who are listed in Appendix A, opted to be identified as part of the research, save for one.

The combination of interview and campaign finance data allows us to carefully consider how changing political circumstances altered the strategies and outlooks of teachers' unions. Moreover, integrating these elements allows us to better engage with the specificities of local circumstances and uncover a more nuanced picture of the health of the party-union alliance, revealing both inter and intra-union perspectives as well as different cultures and competing interests among individual teachers' unions.

We begin our quantitative analysis with the 1995 provincial election, which saw the PCs form a majority government. This was a watershed election for both teachers' unions and the broader labour movement because significant anti-union education and labour law reforms enacted by the Harris government set the stage for anti-Conservative strategic voting to emerge as the dominant electoral tactic employed by teachers' unions in

successive election campaigns. Our analysis focuses on the province's three major teachers' unions. While a fourth teacher union, l'association des enseignants franco ontariens (AEFO), is included in Table 1 in order to give a full picture of teacher unionism in Ontario, both its relative size and low level of electoral activity render it marginal as an object of analysis (see Table 1).

Table 1 Teachers' unions in Ontario

| Union | Scope   | Membership total | Founded |
|-------|---|------------------|---------|
| OECTA | English Catholic system elementary and secondary  | 45,000           | 1944    |
| OSSTF | Elementary, secondary and postsecondary education | 60,000           | 1919    |
| ETFO  | Elementary public schools                         | 83,000           | 1998    |
| AEFO  | French elementary and secondary schools           | 11,958           | 1939    |

Sources: OTF, 2020; OSSTF/FEESO n.d.; AEFO n.d.

### History and Context

Against the backdrop of what labour historian Craig Heron (1998) calls the “Workers’ Revolt,” teachers, like other groups of workers across Canada, began to organize for better terms and conditions of work in the wake of the First World War. Women elementary teachers formed the first provincial teacher federation, the Federation of Women Teachers of Ontario (FWTAO), in 1918 (Graham, 1974: 195; Hanson, 2009: 120). Secondary teachers organized a year later, forming the Ontario Secondary School Teachers’ Federation (OSSTF) in 1919 (Robinson, 1971: 1; Hanson 2009: 120). Men elementary teachers founded the Ontario Public School Men’s Teachers’ Federation (OPSMTF) in 1920 which eventually became the Ontario Public School Teachers’ Federation (OPSTF) and merged with FWTAO to create the Elementary Teachers’ Federation of Ontario in 1998 (Spagnuolo and Glassford, 2008). In 1935, FWTAO, OSSTF and OPSMTF formed the Ontario Teachers’ Council and sought mandatory federation membership for teachers across Ontario (Robinson, 1971: 292-301). Francophone elementary and secondary teachers organized decades later, founding L’association des enseignants franco ontariens (AEFO) in 1939, and Catholic elementary and secondary teachers formed the Ontario Catholic English Teachers’ Association (OECTA) in 1944 (Hanson, 2009: 120). With the passage of *The Teaching*

*Profession Act* in 1944, every teacher in Ontario became a member of the Ontario Teachers' Federation (OTF), with members divided between the existing five federations that came together under the OTF umbrella. The Act enshrined mandatory federation membership, allowed teachers to regulate themselves, and formally declared that federations could represent teachers in contract negotiations. However, the Act stopped short of giving teachers legal bargaining rights or the right to strike (Smaller, 1995: 343).

Teachers finally achieved legal bargaining rights in 1975, following a historic province-wide walkout by the majority of Ontario's 105,000 teachers on December 18, 1973 (Laxer, 1976: 217-25). In July 1975, a few months before that year's provincial election, the Davis PC government adopted Bill 100, a teacher-specific bargaining regime that resulted in few labour disputes and significant salary increases for teachers (Rose, 2002). Under Bill 100, legal rights for bargaining were assigned to teacher federation locals and their local school boards. Backed by the support and coordination of their provincial organizations, the federations deployed a whipsaw approach to bargaining, using key local settlements to set benchmarks for the sector (Gidney, 1999: 121).

Even after the adoption of Bill 100, teacher unions' political action was very much confined to non-partisan lobbying and the presentation of policy position briefs to government (Interviews A5, C5). The OSSTF was the most advanced in this regard, having hired its first lobbyist and legislative researcher in 1972 (Interview C5). OECTA, for its part, was apolitical except on the issue of extending full public funding to Roman Catholic separate schools (Interview B3). But even then, all teacher union affiliates approached political action in a similar non-partisan fashion, at least until the mid-1980s when the Davis government's decision to provide full funding for the separate school system prompted the OSSTF to back a half dozen independent candidates in the 1985 provincial election running in opposition to the all-party consensus on the issue (Interviews C4, C5, C8). That experiment proved a failure, however. In advance of the 1990 provincial election the OSSTF took a different tack, committing the union to working towards a minority government as a way of increasing its political influence, but declining to endorse a preferred party to form that government in deference to the still-strong non-partisan culture of the organization (Interview C9; Winter, 2019: 152).

The OSSTF's intervention in the 1990 campaign was driven by the Peterson Liberal government's decision to pursue an unpopular teacher pension reform in the previous year (Interview C4, C5). Under the voter-friendly slogan "spending too little on public schools is child neglect," the union proved a thorn in the side of the Liberal campaign. It reportedly budgeted \$250,000 for its campaign, with \$150,000 earmarked for contributions to candidates best positioned to engineer a minority government outcome (Gagnon and Rath, 1991: 217-218). While this approach was widely perceived as primarily benefitting the Official Opposition NDP, the union also tacitly (and in retrospect ironically) endorsed PC candidates like future Premier Mike Harris in Nipissing and education critic Cam Jackson in Burlington (Interview C9; Gagnon and Rath, 1991: 219).

When the NDP unexpectedly swept to power with a majority, the OSSTF was elated (Martell, 1995: 14). Teachers' unions were thrilled to see the Rae government resolve the thorny pension issue in their favour, but it did not take long for the new government, in the depths of a global recession, to alienate education workers. With the province's debt and deficit at record high levels in 1993, the Rae government succumbed to pressure from the business community and announced the introduction of its *Social Contract Act* – a fiscal

austerity program that rolled back wages through unpaid days off (dubbed Rae days by critics) and suspended collective bargaining rights in the broader public sector. The Social Contract was met with fierce opposition by all teachers' unions and other public sector unions who came together to form a common front opposition to the government (Ryan, 2019: 119-154; Walkom, 1994: 130-146). The showdown had repercussions for the NDP's relationship to organized labour across the country (Panitch and Swartz, 2003: 172-181; Hargrove, 2009: 120). OSSTF President Liz Barkley (quoted in Martell, 1995: 79) called on the government "not to abandon its social democratic principles in favour of a destructive neo-conservative agenda," but as the government moved to impose settlements in the absence of negotiated deals, New Democrats lost any goodwill they had built up with teachers' unions (Interviews B3, C4). Given the shallow reserves of loyalty that existed between the party and the OSSTF, and the union's transactional view of its relationship to the NDP government, walking away was relatively easy.

Having severely alienated its union and working-class base, the NDP slumped into the 1995 provincial election trailing badly in third place in public opinion polls. Many unions, including teachers' unions, decided to sit on the sidelines rather than intervene in the election directly (Interview C6; Martell, 1995, iv). Former OSSTF President Earl Manners (Interview C8) described it as a "laissez-faire" response. The only money that flowed from a teacher union to a party came in the form of a \$500 donation to a single Liberal candidate (see Figure 3). This level of disengagement likely reflected the longstanding non-partisan culture of teachers' unions combined with an acknowledgement that, while the NDP's Social Contract was unforgiveable, what the opposition parties had on offer was likely worse (Interview B4). In the end, the Mike Harris Conservatives swept to power thanks to a populist right-wing campaign that effectively painted the other parties as fiscally irresponsible and beholden to special interests (Weinroth, 1997). Almost immediately, union leaders regretted they had not done more to alter the outcome of the election as the Harris PCs embarked on a neoliberal policy agenda targeting organized labour and public services (Interview C6).

### **Strategic Electoral Convergence**

The Harris government's "Common Sense Revolution" unquestionably consolidated union opposition to the PCs and forced teachers' unions to confront the reality that their non-partisan approach to electoral politics appeared increasingly ineffective. After sitting out the 1995 campaign, teachers' unions were collectively convinced by the Harris government's deep cuts and radical restructuring of the province's education system that they could no longer afford to sit on the electoral sidelines (Interviews A6, B1, B2, B3, C5, C8). "If we were going to have an impact, we had to become political," explained Marshall Jarvis, who served as OECTA's president during the Harris government's first term (Interview B3).

While the government's neoliberal agenda negatively affected the province's labour movement in myriad ways, the most significant form of restructuring affecting teachers' unions came in the form of Bill 160. The proposed legislation, among other things, removed the taxing powers of local school boards, increased the number of instructional days for students, placed teacher union bargaining under the *Labour Relations Act*, and removed principals and vice-principals from teacher union bargaining units (MacLellan, 2009: 62).

The introduction of the bill, which represented a significant threat to working conditions, set off a firestorm of protest ultimately culminating in a two-week province-wide walkout in October 1997 described as a political protest by teachers' unions (Interviews A6, B3, C4, C8).

Despite public support, the action ended amidst internal tensions among teacher union affiliates after the government made only small amendments to the legislation (A5; A6; B3; C8). As teachers returned to work, OSSTF President Earl Manners (as quoted in Girard et al., 1997) warned, "the political protest will continue far into the future, although the form it may take will obviously have to change." His comment foreshadowed the emergence of teachers' unions as a formidable partisan force in Ontario politics. The unprecedented political protest staged in opposition to Bill 160 had politicized thousands of education workers across all teachers' unions and convinced the unions to step outside their comfort zones and embrace anti-Conservative strategic voting in order to defeat Harris in the 1999 provincial election (Interviews A6, B1, B2, B3, C5, C8, C9). In the words of OECTA provincial executive officer René Jansen in de Wal (Interview B2), "Mike Harris made education political. He sparked a whole new level of activism."

As demonstrated by TABLE 1, collectively, the province's major teachers' unions became big players in Ontario election campaigns beginning in 1999. Union donations to parties, third-party advertising, and internal communications revolved around the theme of anti-Conservative strategic voting (Interviews A6, B4, C1, C3, C7, C9). Blais, Nadeau, Gidengil, and Nevitte (2001: 343) define a strategic vote as "a vote for a party (candidate) that is not the preferred one, motivated by the intention to affect the outcome of the election" and explain that "this definition drives home the idea that a strategic vote is based on a combination of preferences and of expectations about the outcome of the election and on the belief that one's vote may be decisive." In the case of Ontario's teachers' unions, strategic voting was designed to prevent vote splitting among non-Conservative parties. While strictly speaking the strategy was multi-partisan, there is no doubt it overwhelmingly favoured the election of Liberal candidates given that party's electoral viability relative to the NDP. Thus, the strategy has often been misunderstood as a "vote Liberal" approach to elections (Reshef and Rastin, 2003: 175; Interview citation A1, A2, A8, B2, B3).

While the Harris government was ultimately re-elected in 1999, the unions backing the strategic voting effort were quick to defend the tactic and offered some silver linings to justify its use in future campaigns.<sup>3</sup> For example, while the PCs saw a small increase in their share of the popular vote from 44.8 to 45.1%, the party's seat share actually decreased from 63.1 to 57.3%. This was offered as evidence by teachers' unions that efforts to strategically focus resources and endorsements had an impact. In particular, the defeat of PC Education Minister Dave Johnson by Liberal David Caplan in Don Valley East was held up as a shining example of what strategic voting could accomplish (Glassford, 2007: 31).

For the NDP, strategic voting was a disaster. The party lost official status at Queen's Park when it failed to capture a minimum threshold of seats and its share of the popular vote fell by 8 points to 12.6%. When party leader Howard Hampton lashed out at proponents of strategic voting for the party's dismal showing, it only drove the relevant unions closer to the Liberals actively wooing labour support (Interview B4). That is not to suggest that teachers' unions abandoned relations with the NDP altogether. On the contrary, the perceived betrayal of the Rae government in the 1990s had taught teachers' unions that

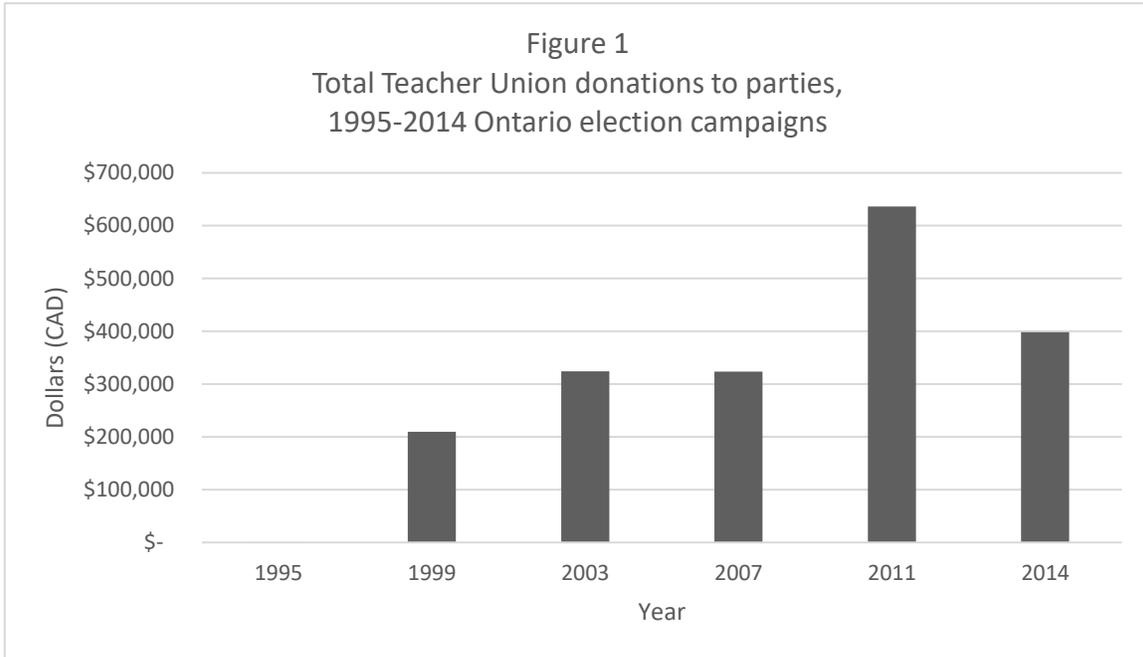
placing all your electoral eggs in one basket could leave you flat-footed in the event of a crumbling strategic partnership. As a result, all of the major teachers' unions funnelled money and resources to the NDP – heavily concentrated towards incumbents and select ridings where the race was likely to be closely contested by NDP and PC candidates (See Figure 3; Interviews B2, B3, C6, C7).<sup>4</sup> Unfortunately for the NDP, very few such ridings existed. Thus, teacher union money and resources flowed overwhelmingly to the Liberals who, in turn, worked to forge stronger electoral ties to their newfound labour allies (Interviews B4, C3, C6, C9).

In the run-up to the 2003 provincial election, the teachers' unions resolved to refine and expand their strategic approach to defeating the PC government. That meant doubling down on the tactic of strategic voting in a more systematic and targeted way and pouring even greater resources into mobilizing members. The unions developed their own education policy platforms for distribution to opposition party candidates and education workers, much of which made it into the parties' own platforms (Interviews C1, C8). They organized workshops to train members to become involved in local Liberal and NDP campaigns. The unions also conducted polling to identify key issues and electoral districts to target, and they provided campaign contributions both provincially and locally to endorsed candidates (OSSTF, 2002; Interviews A6, B1, B3, C3, C7, C9).

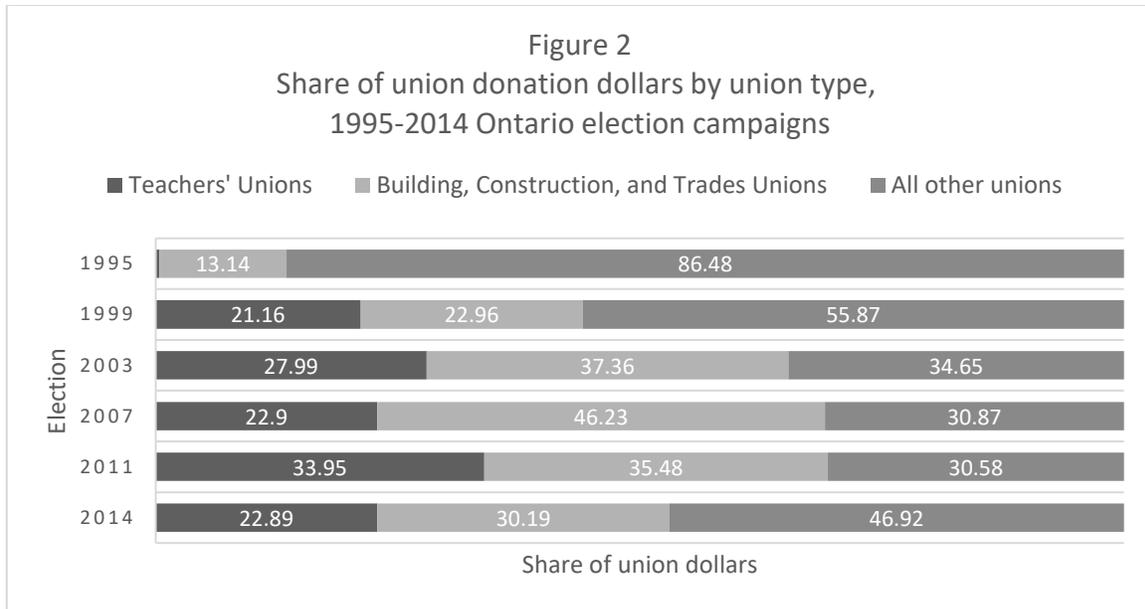
OSSTF and OECTA also joined with a number of other unions to fund the Working Families Coalition, a third party organization designed to pool union resources as part of an anti-PC advertising offensive.<sup>5</sup> Widely considered a union-sponsored Ontario Liberal Party front group, the Working Families Coalition was initially funded by these two teachers' unions, a number of building and construction trades unions, and the Canadian Autoworkers union (Walchuk, 2010; Savage, 2017: 310). Its major third-party advertising blitz supplemented direct union donations to the Liberals and allowed the party to take the high road while the coalition focused on negative attack ads (Walchuk, 2010: 38; Interview B3). The coalition reportedly spent \$500,000 on its anti-PC advertising campaign (Boyle, 2003). The strategy appeared to pay off when the governing PCs were replaced by a Liberal majority government led by Dalton McGuinty.

Teachers' unions played no small part in helping to defeat the PCs and elect the Liberals. The election result ushered in a new era of teacher union relations with the Ontario's Liberal government and an electoral alliance that would help sustain successive Ontario Liberal governments for the next decade (Interview C3). The alliance was neither formal nor ideologically based. Interviewees emphasized the greatest difference between dealing with the McGuinty government and the previous PC government was the open lines of communication and degree of access and consultation afforded to teachers' unions by the Liberals (Interviews A4, B3, C1, C2). Thus, these became key norms of the party-union relationship and adherence to them helped build reserves of loyalty over time. Several interviewees made the point that the relationship was transactional rather than ideological (Interviews A5, B3, C6). According to former ETFO local leader Andy Hanson, alliances were not built around "left loyalties" (Interview A5). Rather, "in my experience, teachers voted for better wages, better working conditions, a better deal for their kids." Doug Joliffe, former president of OSSTF's Toronto Teachers' Bargaining Unit, drew a similar distinction between the "pragmatic" advocates of strategic voting and the "emotional" partisans who championed support for the NDP in ideological terms (Interview C6). Both Hanson and Joliffe claimed personal political orientations that were much closer to the NDP, or left of

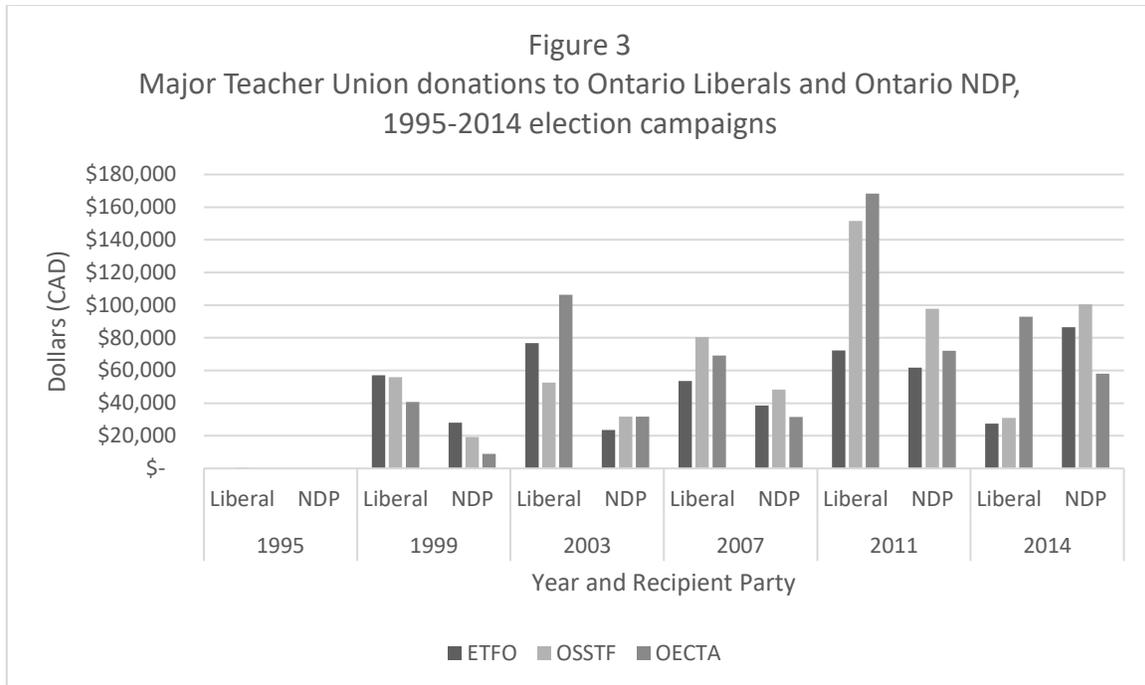
the NDP, than to the Liberals. However, both emphasized that strategic voting was more about blocking the PCs than it was about aligning with a particular party.



With each successive election, teachers' unions set out to further refine their approach to strategic voting. While historical election patterns and public opinion polls largely guided the process of selecting targeted candidates and electoral districts, the unions also started meeting with the Liberals and New Democrats to ask which electoral districts the parties would like to see targeted (Interviews A6, C3). The dominant electoral position of the Liberals, combined with the overall weakness of the NDP, created a scenario in which disputes between teachers' unions and within unions over which candidates to back became increasingly uncommon, with widespread buy-in from activists for the overall strategic approach that overwhelmingly benefitted the Liberals (Interviews A5, B2, C6, C9). The parties were not always in agreement with the strategic targets adopted by the unions, but could not risk alienating them either (Interviews B4, C2). As Figure 2 demonstrates, the two types of unions most heavily invested in strategic voting – teachers' unions and building and construction trades unions – came to dominate union contributions to parties in each election between 2003 and 2014, with the bulk of their money targeted towards Liberals (see Figure 2; Savage and Ruhloff-Queiruga, 2017: 266).



The built up reserves of loyalty between teachers' unions and the Liberals worked both ways. The McGuinty government's pursuit of centralized bargaining underscores this point. When the Harris PCs centralized education funding in 1997 and repealed Bill 100, placing teacher collective bargaining under the *Labour Relations Act*, legal bargaining rights were shifted to each union's provincial body and set in motion the emergence of a system of informal centralized bargaining (Shilton, 2013: 224). The Liberals embraced and continued to develop this centralized model upon taking office in 2003 (MacNeil, 2014: 125). While teachers' unions had concerns about centralized bargaining, they also knew the Liberals were not the PCs and that the new government shared many of their priorities. This policy alignment mitigated teacher union concerns about the effects of centralized bargaining (Interviews C1, C3). As it turned out, the central bargaining tables initially produced decent results for the unions. Salary levels increased, preparation time and student supports were extended, and the government invested millions in the province's education system, including the introduction of full-day kindergarten (Esselment, 2017: 233-34; Interviews A2, A4, B3, C3). Vivian McCaffrey, former ETFO coordinator of Communications & Political Action, also credits Liberal Minister of Education Gerard Kennedy for having done "a lot of work to undo some of the more egregious policies, the anti-education, anti-teacher, policies that the Harris government had implemented" (Interview A6). These changes included a repeal of the previous government's teacher testing legislation and the restoration of relative labour peace to the sector. Dalton McGuinty, the self-styled "Education Premier," worked hard through his Ministers of Education, particularly Kennedy and later Kathleen Wynne, to cultivate positive relationships with union leaders. These investments helped the Liberals to build further reserves of loyalty by locking down increasing levels of teacher union support through campaign contributions between 2003 and 2011 (Canadian Press, 2011; Interviews A6, C6; see Figure 3). In the words of Elementary Teachers of Toronto (ETT) president Jennifer Brown, "there was a love fest with the Liberals" during this period (Interview A2).



In the 2007 and 2011 provincial elections, teachers' unions doubled down on the anti-Conservative strategic voting and third party advertising campaigns that appeared to work so well in 2003. The unions became increasingly invested in the Working Families Coalition, whose messaging perfectly complemented Liberal campaign themes (Walchuk, 2010: 38). Moreover, teacher unions' direct election campaign contributions continued to the overwhelming benefit of the governing Liberals, thus reinforcing the utility maximization dimension of the party-union relationship (see Figure 3). Increased teacher union investment in electoral politics was reflective of the degree to which labour leaders believed their strategies were successful at both blocking Conservatives and preserving union influence over education policy (Interviews A6, C6).

### Strategic Dilemmas: Voice or Exit

The ad hoc political alliance between teachers' unions and Ontario's Liberal government experienced its first significant signs of stress in the wake of 2012 Drummond Report, which recommended significant cuts to public services, including education (Interviews A3, A4, A6, B4, C1). Authored by economist Don Drummond, the Report was commissioned by the government to provide guidance for how the province could best address ballooning debt concerns in the aftermath of the 2008 global financial crisis. The Report's clear call for austerity was followed by a March 2012 provincial budget that included proposed wage freezes for education workers (MacNeil, 2014: 135; Mancini, 2020: 5).

Despite having built a positive relationship with the province's teachers' unions, McGuinty's now minority government was unable to convince them to accept concessionary contracts.<sup>6</sup> After months of negotiations, including outright threats to legislate wage freezes, talks broke off and only OECTA remained in discussions with the government. By July 2012, OECTA and the government signed a central agreement that included a two-year wage freeze, significant changes to sick leave, and three mandatory

unpaid days for all teachers, equivalent to a 1.5 percent wage cut (MacNeil, 2014; Mancini, 2020). AEFO followed suit in early August, but OSSTF and ETFO continued to resist. Former OSSTF President Harvey Bischof (Interview C2) argues the government was motivated by a “completely unwarranted fiscal panic.” Former ETFO President Sam Hammond (Interview A4) explains that his union was “completely blindsided and shocked” by the government’s ultimate decision to legislate rather than find a negotiated solution. After all, he argued, up until that point relations between the government and ETFO had been “more positive than negative.” In September 2012, with the support of the PCs, the Liberals passed Bill 115, the *Putting Students First Act*, giving the remaining unions until December 31 to negotiate contracts that were “substantively identical” to the OECTA agreement (Mancini, 2020: 5). The legislation did not propose restructuring the wider education system, but specifically targeted the wages, benefits, and bargaining rights of education workers – items likely to generate very little public sympathy for teachers’ unions given the broader negative economic climate for working-class people at the time (Mancini, 2020: 11). The ETT’s Jennifer Brown characterized the legislation as a game-changer for the union-party relationship and described its passing as the most “disgusting display of power, control, and abuse” (Interview A2). In the face of such apparent betrayal, OSSTF and ETFO found themselves having to navigate not only a bargaining crisis, but a fractured political relationship that appeared to no longer serve their interests. Neither union met the December 31 deadline, and in January 2013, the Liberals imposed the OECTA deal on OSSTF and ETFO and removed their right to strike (MacNeil, 2014: 138; Mancini, 2020: 7).

As illustrated in Table 2, the province’s major teachers’ unions shifted positions along a voice/exit continuum during a fifteen-year period of Liberal rule, but those shifts were most pronounced around the introduction and imposition of Bill 115. Thus, Bill 115 was a significant disruptor of the ad hoc political alliance between teachers’ unions and the Liberals. Individual teachers’ unions, however, responded to the loyalty dilemma in different ways.

Table 2 Union positions along the voice/exit continuum

| <i>Union</i> | <i>Norm-based vo</i> | <i>Norm-breaking vo</i> | <i>Exit</i> |
|--------------|----------------------|-------------------------|-------------|
| OECTA        | 2003-2018            |                         |             |
| OSSTF        | 2003-2012            | 2012-2018               | 2018        |
| ETFO         | 2003-2012            | 2012-2014               | 2014-2018   |

OECTA’s provincial leadership shared the closest ties to the government and was the least resistant to the government’s labour relations priorities (Interviews A2, B1, B4). That OECTA made a deal with the Liberals ahead of Bill 115’s passing greatly disappointed ETFO and OSSTF, but OECTA leaders defended it as a deal that could be supported given the context and on the basis that Catholic teachers faced slightly different issues than members of other unions (Interviews B1, B2, B3). Nevertheless, a significant number of OECTA

members were upset with their union's approach. Much of the internal opposition was based on the perception that the deal skirted the democratic process because members were not asked to ratify its content. Moreover, while some units saw sick leave benefit improvements, the overall impact of the deal meant that other Catholic teachers would lose retirement gratuities that had been accrued over several rounds of bargaining (Interviews B1, B2, B4). Former OECTA local executive officer David Chiarelli (Interview B1) went so far as to characterize the union's deal with the government as a "deep and profound betrayal" and the product of "Vichy mentality."

Marshall Jarvis rejects the view that the deal struck with the government constituted a betrayal, arguing "You can take a short term view of the world which is 'I hate you for the rest of my life because of what you just did to me,' or you look at how do we make sure this never happens again ... It's not just the teachers who have long-term memories. There's a lot of politicians out there with long-term memories too" (Interview B3). The union's leadership clearly preferred a norm-based voice approach to dealing with its political ally and was willing to help quell internal dissent to achieve it. Thus, despite a significant level of internal union resistance, the ad hoc electoral alliance between the Liberals and OECTA was largely preserved. The union did, however, significantly reduce its campaign contributions to the Liberals in the 2014 election (see Figure 3).<sup>7</sup> The lasting strength of the OECTA-Liberal Party alliance is likely explained by a combination of factors including a shared interest in defending publicly funded Catholic education,<sup>8</sup> traditional Liberal support among Catholic voters, the personal political allegiances of key union actors, McGuinty's status as only the second Catholic Premier in the province's history, and a pragmatic recognition that conditions would likely be much worse under an unapologetically anti-union PC government (Interviews B1, B4, C1, C7, C8).

OSSTF's alliance with the Liberal government proved more tenuous. Its history of quiet backroom diplomacy with the McGuinty Liberals was interrupted by the government's sudden announcement in 2012 that it would legislate rather than negotiate with teachers' unions. The introduction of Bill 115 drove OSSTF to openly criticize the government and mobilize its members to participate in a series of demonstrations designed to pressure the Liberals to change course (Interview C2; Hewitt-White, 2015). A mass demonstration by education workers and their allies outside the Ontario Liberal Leadership convention in January 2013 revealed just how badly the party-union relationship had been damaged (Interview A3).

However, behind the scenes, money was flowing from the OSSTF's powerful Toronto-based District 12 to a handful of Liberal leadership candidates vying to replace outgoing Premier Dalton McGuinty as leader (Hewitt-White, 2015: 185). Consistent with the idea of using norm-breaking voice, this political manoeuvring was designed to salvage and repair the damage caused by Bill 115 without having to completely sever an electoral alliance with the governing Liberals (Interview C6). Months later, the Liberals, now led by former Education Minister Kathleen Wynne, announced that OSSTF's president, Ken Coran, would be the government's standard bearer in a by-election for a London-area seat the Liberals had held comfortably since 2003. The move, clearly designed to bring OSSTF fully back into the Liberal fold, backfired when local union leaders and activists, including members of OSSTF, rallied around the anti-Bill 115 NDP candidate who won the contest in an upset (Interviews A4, C2, C6). "It was a painful period for the union ... it definitely opened a

wound in the Federation,” argues former OSSTF Associate General Secretary Domenic Bellissimo (Interview C1). Coran finished a distant third.

Coran’s rebuke, however, did not lead to the disintegration of strategic voting as the union’s preferred electoral strategy in general elections. Harvey Bischof (Interview C2) explains that Wynne’s government “made a significant effort to mend fences” and that his union always maintained good relations with a number of individual Liberal MPPs. Thus, when PC leader Tim Hudak emerged as the primary threat to the Wynne government’s re-election in 2014, OSSTF resorted to backing Liberals as part of a multi-partisan anti-Conservative strategic voting effort, although for the first time since 1990 a greater share of its donations flowed to the NDP rather than to Liberal campaigns (see Figure 3). It is also noteworthy that the three major teachers’ unions each contributed \$250,000 to the anti-PC Working Families Coalition for the 2014 campaign – an investment that indirectly helped the Liberal re-election effort (Elections Ontario, 2014).

Facing mounting criticism over the province’s *laissez-faire* approach to regulating campaign finance, the Wynne Liberals, re-elected with a majority, introduced reforms in 2016 banning corporate and union donations and placing limits on third-party advertising (Benzie, 2016). The reforms undercut teacher unions’ two main strategies for influencing election outcomes, but did not stop them from investing in third-party ads or maintaining a strategic voting mindset in the subsequent 2018 election campaign (Interviews C1, C2). A series of Liberal-produced anti-union attack ads aimed at the surging NDP, however, convinced OSSTF to withdraw its strategic endorsement of individual Liberal candidates shortly before election day (Interviews C1, C2, C6).

ETFO was least willing to forgive the Liberals for Bill 115. The union had staged rotating one-day strikes across the province in December 2012 and was the main driver behind teacher union demonstrations against the Liberals (Interviews A3, A4, A7). ETFO even endorsed the NDP candidate running against former OSSTF president turned Liberal candidate Ken Coran in the 2013 by-election (Boles, 2013). For many of the union’s younger members, Bill 115 was their generation’s Bill 160 (Interviews A3, A7). In fact, ETFO member Jennifer French credits the legislation and its clawbacks for her political awakening. The union’s political fight-back against Bill 115 convinced her to join the NDP and run in the 2014 provincial election where she defeated a long-serving PC incumbent in Oshawa (Interview A3).

Still fuming over Bill 115, ETFO cut off any and all financial support for the Liberals in the run-up to the 2014 provincial election (Interview A6), and only restored small and targeted amounts of funding during the campaign once it became clear that the Liberals were the only party capable of fending off a PC victory (Interviews A4, A6; Figure 3). Still, for the first time in its history, ETFO donated more to the NDP than to the Liberals during the campaign period, signalling a significant crack in the longstanding electoral alliance between teachers’ unions and the governing Liberals (Figure 3). Once the election was over, ETFO forged even stronger ties to the NDP, no doubt assisted by a 2016 Ontario Superior Court of Justice ruling that found the Liberal government had violated the unions’ right to meaningful collective bargaining with the imposition of Bill 115 (Morrow and Alphonso, 2016). Several interviewees credited ETFO President Sam Hammond’s leadership for skilfully steering his union decisively towards the NDP and vice versa – a task that became easier once Liberal fortunes soured a year ahead of the 2018 election (Interviews A1, A2, A5, A8, C1). ETFO made teacher union history by abandoning strategic

voting and endorsing the NDP outright at the outset of the campaign (Interviews A4, A5, A6, A7, A8). “All the pieces aligned,” explained Hammond (Interview A4). “We didn't want to be on a sinking ship,” he added in reference to dwindling Liberal fortunes. The NDP went on to lose the election to the PCs but did form the Official Opposition; the governing Liberals not only lost power, but also official party status. The result has made some within the union question the wisdom of abandoning strategic voting in favour of a wholesale NDP endorsement (Interview A2).

The strategic electoral divergence described above raises two important questions about the relationship between parties and teachers’ unions in Ontario. First, why did individual teachers’ unions initially respond through strategic convergence around a policy of multi-partisan anti-Conservative strategic voting? Second, what led to the breakdown of that strategic consensus? We argue that teachers’ unions were initially drawn towards strategic voting as a preferred electoral tactic in order to address the perceived existential threat of PC victory. That strategic route overwhelmingly benefitted the Liberals as the most electorally viable alternative to the PCs, and was reinforced through productive relations based on utility maximization. However, this political consensus faded over time because individual teachers’ unions faced different opportunity costs to maintaining an electoral alliance with the Liberals, especially after the government pursued austerity measures viewed unfavourably by education workers.

## **Conclusion**

The strategic electoral dilemmas faced by Ontario teachers’ unions in relation to the provincial Liberal government are best understood through the theoretical lens of Burgess’ modified exit, voice, and loyalty framework. Specifically, the framework embeds the concept of loyalty into the operating principles and norms on which these electoral alliances are traditionally based. When a teacher union-backed provincial government, led by a self-described “Education Premier,” embraced an agenda viewed as hostile to the interests of education workers, it challenged the utility maximization foundation of the party-union relationship and created a loyalty dilemma for both teachers’ unions and Liberal government officials and operatives. Initially, the unions were drawn to the Liberals because the party was best positioned to defeat the ruling PCs and was aligned with the unions on several key policy issues. Once the Liberals took office after the 2003 election, loyalty was fostered and accumulated through a series of union-supported policy initiatives and budgetary investments between 2003 and 2012. While the relationship was not tension-free during this period, disagreements were successfully addressed through the use of norm-based voice and patterns of teacher union campaign contributions suggest that unions saw utility in maintaining and strengthening an electoral alliance. Only after the Liberal government ignored warnings by teachers’ unions to negotiate rather than legislate the terms of what would become Bill 115 did the relationship begin to crumble, albeit unevenly.

The loyalty dilemmas produced by Bill 115 played out differently across teachers’ unions. The extent to which individual teacher unions shifted to norm-breaking voice in response to the legislation differed based on the specific impact of Bill 115 on members of that union, the relationships between union and party leaders, and the perceived opportunity cost of maintaining an electoral alliance with the Liberals in spite of the

legislation. OECTA and the governing Liberals used norm-based voice to achieve a negotiated agreement in advance of the legislation's adoption and maintained their relationship. After the government imposed new collective agreements via Bill 115, the Liberals moved quickly to repair their floundering relationships with OSSTF and ETFO by repealing the legislation and wooing OSSTF's former president to run as a Liberal candidate in a 2013 by-election. This strategy, however, exposed a significant gap between the provincial union leadership and the union membership, as local leaders and activists rallied around the NDP's by-election candidate and helped propel her to victory in a stunning upset. Only the existential threat of a PC victory in the 2014 general election – and the real threat of right-to work and other anti-union legislation – drove ETFO back towards targeted support for Liberals, albeit half-heartedly, as part of a broader campaign of coordinated anti-Conservative strategic voting. Both OECTA and OSSTF have demonstrated the strongest and most enduring support for this particular electoral strategy, as evidenced by patterns of endorsements and targeted campaign contributions. ETFO, however, opted for exit and abandoned strategic voting in advance of the 2018 provincial election in favour of a wholesale endorsement of the NDP. That party's improved position in the polls made it the primary beneficiary of strategic voting and the Liberal campaign's decision to blast the NDP for its union connections in the dying days of the 2018 campaign resulted in the OSSTF withdrawing its support for select Liberal candidates and exercising its exit option.

Teachers' unions inability to donate directly to parties in the 2018 election and a legislative curb on the use of third party advertising – which effectively short-circuited the ability of outside groups to run TV ad campaigns – appeared to have dampened the political impact of teachers' unions (Interviews A7, C3). Additional campaign finance reforms adopted by the Ford Conservatives in advance of the 2022 provincial election have further limited opportunities for third parties, like teachers' unions, from having an impact on election campaigns.<sup>9</sup>

Despite the end of fifteen years of Liberal rule in Ontario, teachers' unions have not abandoned the party altogether in favour of the NDP. Internal debates about electoral strategy are a hot topic in all teachers' unions and electoral viability looms large in such discussions. In the eyes of many teacher union leaders, the capacity of a party to defeat the PCs is just as important, if not more important, than a party's own commitment to teacher union public policy priorities. This perspective is clearly informed by a worldview of electoral and party politics as being a transactional rather than ideological terrain of struggle. How such relationships will continue to develop is still an open question – and the evolving campaign finance landscape will undoubtedly inform strategy – but utility maximization and a desire to block the election of conservatives will no doubt continue to shape such debates into the future.

### **Acknowledgements**

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## Notes

- <sup>1</sup> While we use the term ‘teachers’ unions’ in this article to refer to provincial teacher federations in Ontario, it is important to acknowledge that some of these unions no longer exclusively represent teachers. For example, over thirty percent of OSSTF’s membership is comprised of educational assistants, office administrative personnel, speech pathologists, university support staff, and others who work in education (OSSTF/FEESO, 2014).
- <sup>2</sup> The data set was parsed from a larger database assembled by Savage and Ruhloff-Queiruga (2017) using publicly available records from Elections Ontario. Savage and Ruhloff-Queiruga manually calculated campaign donation totals by combining data during election periods using three separate collections of financial statements for each election campaign dating back to 1995 (CR-1 Candidate Campaign; CR-3 Constituency Association; and CR-4 Political Party). After extracting relevant data from each individual constituency association and candidate campaign statement, they combined that data with the total direct union donations to political parties in order to uncover the clearest possible picture of union political financing activity during campaign periods. They also relied on TPAR-1 financial statements which document third party campaign registration and spending (available since the 2007 and 2014 election campaigns, respectively). For the purposes of this paper, we extracted records related to teachers’ unions specifically.
- <sup>3</sup> For a detailed summary of the difficulties unions encountered in convincing members and the public to vote strategically see Reshef and Rastin (2003) and Savage (2012).
- <sup>4</sup> OECTA showed little interest in endorsing candidates in electoral districts where the PCs were a non-factor, whereas OSSTF and ETFO showed more interest in backing NDP candidates in such races (Interviews B2, B3, B4).
- <sup>5</sup> ETFO would later join the Working Families Coalition in time for the 2007 election.
- <sup>6</sup> Retired OSSTF political staffer Larry French mused that the government’s uncharacteristically tough stance in bargaining was designed to help the Liberals win a key by-election in Kitchener-Waterloo – a long time PC electoral district that, if flipped, would secure McGuinty a majority government. As it turned out, the NDP unexpectedly triumphed in the September 2012 by-election, thanks in part to backlash against Bill 115 (Interview C5).
- <sup>7</sup> Despite a decline in campaign contributions to the Liberals, OECTA, unlike the other major teachers’ unions, continued to donate more money to the Liberals than to the NDP in the 2014 campaign (see Figure 3).
- <sup>8</sup> While all three major parties in Ontario are officially on record as supporting public funding for Catholic schools, the Liberals are likely seen as the system’s most reliable ally. The NDP, on the other hand, is likely viewed as least reliable given considerable support within the party for a single public secular system (Interviews C7, C9)
- <sup>9</sup> ETFO, OECTA, and OSSTF filed successful Charter challenges contesting the law’s constitutional validity, but the Ford government invoked the notwithstanding clause in June 2021 in order to preserve the legislation.

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## **Appendix A**

### **List of interviewees (alphabetically by teacher union)**

#### **ETFO**

- A1 Yolanda B'Dacy, Executive Officer, Elementary Teachers of Toronto.
- A2 Jennifer Brown, President, Elementary Teachers of Toronto
- A3 Jennifer French, ETFO activist and current Ontario NDP MPP for Oshawa
- A4 Sam Hammond, ETFO president 2009-2021
- A5 Andy Hanson, Executive Officer, ETFO Hastings-Prince Edward Local
- A6 Vivian McCaffrey, former ETFO coordinator of Communications & Political Action
- A7 Felipe Pareja, Executive Officer, ETFO Peel Local
- A8 Felicia Samuel, Executive Officer, Elementary Teachers of Toronto, former Ontario NDP candidate

#### **OECTA**

- B1 David Chiarelli, former Executive Officer, OECTA Toronto Elementary
- B2 René Jansen in de Wal, 2nd Vice-President, OECTA
- B3 Marshall Jarvis, OECTA President 1997-99, General Secretary 2005-2019
- B4 Confidential OECTA Interviewee

#### **OSSTF**

- C1 Domenic Bellissimo, former OSSTF Associate General Secretary
- C2 Harvey Bischof, OSSTF president 2017-2021
- C3 Craig Brockwell, former OSSTF Executive Assistant - Government Relations
- C4 Malcolm Buchanan, OSSTF President 1982-1985, General Secretary 1995-2002
- C5 Larry French, former OSSTF Director of the External Policy Department
- C6 Doug Joliffe, former president OSSTF Toronto Teachers' Bargaining Unit
- C7 Doug Little, former OSSTF Executive Assistant – Communications/Political Action
- C8 Earl Manners, former OSSTF President 1995-2003, former Ontario NDP candidate
- C9 David Moss, former OSSTF Director – Communications/Political Action

All interviews conducted between April 19 and May 28, 2021.