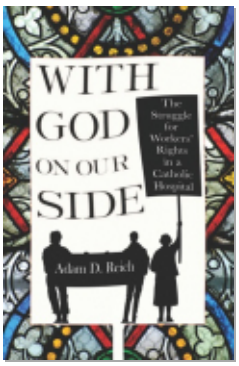
4. Winning the Heart Way: Organizing and Cultural Struggle



4

Winning the Heart Way

Organizing and Cultural Struggle

When SEIU hired Eileen Purcell and Fred Ross Jr. to develop its Catholic strategy, the union gained tremendous credibility within the Catholic community. Ross and Purcell were widely recognized for their social justice work, and they had relationships with Catholic leaders across the state and country. Because of their prior work, Ross and Purcell knew and had worked alongside several of the Sisters of St. Joseph of Orange. Several Sisters of St. Joseph had been in contact with Ross during the farmworker movement in the 1970s; with Purcell during her tenure at the SHARE Foundation in the 1980s; and with both in support of citizenship and immigrant rights in the 1990s. Ross and Purcell not only brought understandings of multiple worlds to the union, but they brought new relationships to the union as well. And at the same time they pushed the Sisters of St. Joseph of Orange to change their perspectives on unions, they pushed the union to broaden its relationship with sisters. As a part of her work on Catholic healthcare, for example, Purcell began to attend a coalition of sisters working against human trafficking. Not only could Purcell deepen

her relationships with the sisters through this work, but she could also demonstrate the common values the sisters and union shared regarding human rights and economic justice.

As the campaign shifted more fully into the religious arena, the union strategy was to encourage religious leaders—those seen as having moral legitimacy—to support the union's interpretation of Catholic social teaching, creating a crisis within the Catholic community that would propel the campaign toward settlement. This was no simple task. Religious leaders had good reasons not to want to get involved in a labor conflict, particularly one involving a religious institution. Many Catholic leaders had long-standing relationships with Sister Katherine Gray and other nuns in the Sisters of St. Joseph of Orange. Other prominent Catholic institutions relied on the Sisters for financial support. Moreover, religious leaders recognized the flexibility of theological argument and were skeptical of jumping into the fray of contentious politics. As one Santa Rosa monsignor told me, "Even the devil reads scripture," explaining that "scripture can be used for bad ends as well as good." Another priest whom I was trying to get involved in the campaign was even more direct: "You say one thing, the hospital says another thing. How do we know whom to believe?"

In my first meetings with religious leaders, I had little to go on beyond my limited powers of persuasion. I am not an especially religious person, but had the naïve vision of these leaders jumping at the chance to right a wrong within the faith community. After all, I thought, these religious leaders were insulated from business concerns and so would be able to see the Sisters' interpretation of Catholic teaching on labor as a cynical, market-driven morality. I quickly was disabused of these notions on a visit to Reverend Tom, a pastor and the president of the local Ministers' Prayer Fellowship Breakfast. After I finished describing the hospital's antiunion campaign, Reverend Tom expressed dismay that the Sisters were not doing God's will, were letting the market dictate the treatment of hospital workers. I felt as if he might jump at the chance to become involved.

But then Tom pointed to three pictures on his wall—one with Jesus leading sheep, one with Jesus comforting the sheep, and one with Jesus fighting wolves to protect the sheep. He discussed how an employer was responsible for leading employees, for comforting them, and for protecting them. He said his responsibility was to encourage employers to treat their workers

well. As an example, he told a story about the workers doing construction in the back of his church. Several weeks before, Tom had gone to check on the work when he found the boss, a man Tom ministered to as part of a "business prayer fellowship," shouting at his employees. Tom took the employees aside and told them, "This guy, he was praying for you this morning. He really does care about you, but he's a young Christian so be patient with him." For Tom, a commitment to justice meant a commitment to encouraging beneficent employers, yet the employees were passive sheep needing to be led. After telling me that he would encourage his ministers' group to pray for a just resolution, our meeting was over. I had no luck deepening his engagement with the campaign.

Reverend Tom's paternalistic theological orientation, in hindsight, seemed almost impossible to reconcile with the argument the union sought to make. But his interpretation of Christian teaching seemed at least in part a product of his ongoing relationships with business owners in Santa Rosa, which implicitly framed the way he thought about workers' rights. Religious leaders were nested within existing social networks that influenced their openness to hearing about workers' desires for unionization. On my first visit to a Presbyterian minister, the minister's secretary flinched when I told her I was with SEIU. The minister would tell me later that the secretary's husband was a technical worker at the hospital who opposed the union. He said several congregants were doctors and managers at the hospital, and he expressed worry about the recent decline in the number of people who attended his congregation. So despite the rapport that I felt we developed over the course of a ninety-minute conversation, and despite his espoused desire to bring "issues of justice" to his congregation, I was not surprised when he stopped returning my phone calls.

When I visited a progressive Reform synagogue accompanied by the head of its social action committee, I was taken aback when the rabbi—having supported the Memorial organizing effort in the past—seemed to have cooled to the idea. He told me he could understand worker justice when it came to the farmworkers and other low-wage employees, but he said he did not understand why relatively well-paid hospital workers would need a union. I found out later that an administrator from another local hospital was on the board of the synagogue, and had chided the rabbi for his support of the Memorial campaign. A Lutheran minister's story was similar. At first his resistance to supporting the union seemed a theological

one: he wanted to use social justice issues to unify his congregation rather than divide it, and he was worried that a union drive would deepen existing divisions among his flock. It was only toward the end of the conversation that he revealed he was close with someone at the hospital who had told him the union would disrupt the relationships between workers and management. Perhaps unsurprisingly, religious leaders were in some ways followers, their interpretations of doctrine influenced by those with whom they came into contact every day.

These preexisting relationships sometimes worked in the union's favor as well. An Episcopal priest knew a woman who had been a charge nurse at Memorial and had left her job because Memorial was "the most un-Christian place she had ever worked." He was also friends with an Episcopal chaplain who, according to the priest, had been fired from the hospital after giving last rites to a Roman Catholic when a Catholic priest was not available. A United Church of Christ minister had attended a mothers' group with a Latina hospital worker. And a couple of Latino workers on the organizing committee regularly attended local Catholic churches. José and his family were friends with the two priests at his local church. These relationships opened doors for the union that might otherwise have been closed.

Building Strategic Relationships

On the morning of Sunday, June 15, 2008, Monsignor John Brenkle of St. Helena Catholic Church celebrated the fiftieth anniversary of his ordination, and friends joined him from far and wide. Ross and Purcell were among these friends. Monsignor Brenkle traced his own political awakening to Bobby Kennedy. With a group of fellow seminarians, Brenkle had visited the Department of Justice in the midst of the civil rights movement. Kennedy, then the attorney general (and a Catholic), had addressed the group and challenged the Catholic Church to do more on behalf of the movement. It was with that in mind that Ross presented Brenkle with a framed collage that traced a social justice lineage from Kennedy, through Cesar Chavez and Dolores Huerta, to Brenkle himself, below the quote from Kennedy:

> Each time a person stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope, and

> crossing each other from a million different centers of energy and daring, these ripples build a current that can sweep down the mightiest walls of oppression and resistance.

Ross and Purcell had been introduced to Monsignor Brenkle in 2001 by Reverend Ray Decker, a lifelong friend, mentor, and colleague of Purcell's. Monsignor Brenkle was and remains one of the most highly respected religious leaders in Napa County, which is part of the Diocese of Santa Rosa that also includes Sonoma County. He is a trained canon lawyer and an ardent supporter of farmworker rights. He also has close relationships with growers, some of whom are members of his parish in St. Helena. He is a trusted adviser of the local bishop and once sat on a community outreach board at Queen of the Valley Hospital, a Napa hospital owned by St. Joseph Health System.

Brenkle had long had the respect of other priests in the diocese, and he became even more indispensable when several priests there were charged and convicted of sex-abuse crimes in the 1990s. The bishop at the time was charged with both abuse and embezzlement, having funneled diocesan contributions into payments to abuse victims and legal fees. By 2000 the diocese was in disgrace, and almost bankrupt. Brenkle not only served as financial officer for the diocese in the aftermath, but also chaired a review board to help rebuild congregants' faith in the church. A 2000 article in *Salon.com* reported on the process Brenkle helped lead:

> In the Diocese of Santa Rosa, leaders agreed to hold a series of town meetings, chaired by Brenkle, to let Catholic laymen as well as women, nuns and priests air their fear and anger. I attended one last month, and witnessed both the pain and the surprising healing power the scandals have unleashed within one corner of the church.[1]

By listening to the pain of abuse victims, Brenkle began a healing process that likely saved the diocese from bankruptcy. In the process he earned the eternal gratitude of the remaining diocesan leadership, and learned a thing or two about the Church's own moral failings.

Brenkle was also close to Sister Katherine Gray and others within the Sisters of St. Joseph of Orange. Sister Katherine had been a teacher at a Catholic school where Monsignor Brenkle had been principal, and Brenkle

remembered her as "a talented woman," someone who "could come in to a meeting where there'd be all kinds of dissenting ideas and she would be able to synthesize and get people to focus on the central point." Another Sister was one of Brenkle's close friends, and had sewn a tapestry that hung on Brenkle's office wall.

Ross and Purcell started visiting St. Helena as early as 2001, anticipating that Brenkle might become an important ally, but he did not want to get involved. According to Brenkle, he "did not want to incur other people's anger or wrath." Purcell remembered, "He did not want to get involved initially because he had close ties with these Sisters." Brenkle was not alone. Those who had close ties with the Sisters were those least likely to get involved, but they also were the ones to whom the Sisters were most likely to listen. The costs to involvement were sometimes high. One former Sister of St. Joseph of Orange had stayed in touch with one of her mentors in the order, visiting her every week for many years. Yet when this former sister began to support the unionization effort, her mentor terminated all contact. One union leader discussed the situation with another sister whom she had known for decades: "She's shaking her head and you can tell she doesn't want to do anything about it. Because the St. Joseph Sisters have her come out there once a year to give a workshop, she doesn't want to sacrifice the relationship by holding them accountable." In the Catholic Healthcare West campaign, sisters throughout the country "closed ranks and were fiercely loyal to the Sisters' position." Some Sisters had even faced discipline or risked expulsion when they challenged system leaders.

Throughout the unionization effort at Santa Rosa Memorial Hospital, Purcell and Ross kept Brenkle informed about the campaign's ebb and flow, regularly driving the ninety minutes from Oakland to St. Helena. Monsignor Brenkle also became increasingly aware of St. Joseph Health System's antiunion stance during his involvement with Queen of the Valley Hospital. On one occasion in 2006, an SJHS ethicist appeared as a guest speaker at the hospital and began to attack the unionization drive. But it was Brenkle's ongoing relationships with Ross and Purcell that helped him have a change of heart.

Sociologists have shown the extent to which social networks can serve as resources for individuals, businesses, and social movement organizations.[2] Typically, however, networks are regarded as relatively static webs of relationships that precede and help to explain subsequent outcomes.

Community organizers in the union did not make use of existing social ties only, although these were certainly important. They also actively sought to establish and deepen relationships with key religious leaders who could provide symbolic legitimacy to the struggle. Relationships were discussed as things to be used strategically, "moral resources" that would increase rather than decrease if deployed, and might atrophy if underutilized.[3] At one point during the campaign, when I expressed a desire to return to my graduate studies, a leader of the campaign instructed me to begin to "decentralize my relationships," introducing others on the campaign to those with whom I was closest so that these allies could still be put to use by the union effort. Religious leaders got involved in the struggle not only because they believed it was the "right thing to do" but also because they were embedded within networks of relationships that the union fostered deliberately.

This is not to say that the relationships organizers developed on the campaign were fake or purely instrumental. Ross, Purcell, and other leaders on the campaign distanced themselves from organizers and organizations that treated religious leaders as interchangeable—"renting-a-collar" in organizing parlance. Ross and Purcell both emphasized the importance of ongoing relationships to the organizing effort. They each had long-standing relationships with faith leaders in California, and mined these relationships for connections to key actors who might have some influence with the Sisters of St. Joseph of Orange. In her summary of the St. Joseph Health System campaign, Purcell wrote:

> Strategic allies persevered and accompanied SJHS workers in part because of the long term relationships we established. Some engaged the fight because of long standing ties to Eileen and Fred. Others were recruited and cultivated with systematic outreach and follow-up. Our approach was relational, not transactional. The relationships were based on trust, shared vision, and honest, ongoing communication which earned credibility. They were dynamic and grew over time.[4]

Ross and Purcell were masters at developing relationships that were "not transactional" but at the same time helped build power on behalf of the union. According to Ross, both he and Eileen had "nurtured and developed lifelong relationships with people like Brenkle. So from the start, this

is not going to end the day after the vote." Purcell recognized that "one of the great critiques of union organizers in the religious community is [that] we parachute in, we rent-a-collar, they come to the action, and that's it. That's not how we organize." For Purcell and Ross these relationships were long-term, reciprocal, and expansive—based on shared values more than narrow interests.

Nevertheless, despite this approach to relationships, there remained some tension in the union between the instrumental purposes for which relationships were established in the first place and the kind of emotional work necessary to sustain and develop these relationships. Said differently, if the instrumental nature of relationships was too obvious, the relationship was no longer useful. There is an element of exploration or of growth within relationships that cannot be reduced to exchange.

The tension between the instrumental and authentic was highlighted for me when I went to visit a Catholic priest with a Latina woman who worked at the hospital and attended the priest's church. Early on in our conversation the priest asked her, "Why should I give you my support?" The worker answered, "Because you baptized my children." Laughing, the priest responded, "That's not a good reason." Of course this connection *was* the reason union leaders thought the worker would be a good person to speak with the priest, but the extent to which the interaction was an exchange had to be couched in different terms. The priest demonstrated the implicit rules governing the exchange later in the same visit when the worker's friend—who was babysitting the worker's child outside while she spoke with the priest—asked the priest to bless her new house up in Santa Rosa and then asked how much the blessing cost. The priest responded, "Cost? It doesn't cost anything. You make a donation." The blessing was done for "free," with the donation a gift in return.

One priest whom I came to know through the campaign was supportive of workers' rights but skeptical about the union's strategy, criticizing it as being too instrumental. He said that he had a problem with all community organizers (failing to mention that I was having a conversation with him as a community organizer myself) because they were too "agentic," meaning their relationships were used for ends other than the relationship itself. He admitted that when he had been involved with community organizations in the past he "didn't have friendships that were just friendships." Rather, these friendships "had some other agenda attached—how they could help

me with my projects." The priest seemed implicitly to be probing the extent to which *our* relationship was authentic or merely a result of my desire for his support. Organizers with the union overlooked these noninstrumental dimensions to relationships at their own peril.

A Unitarian minister admitted that our relationship was the reason he had gotten involved in the Memorial campaign. There are all sorts of injustices in the world to which he could usefully contribute his time, he told me. He admitted he had become involved in the Santa Rosa Memorial Hospital campaign because I was one of the people who showed up at the door to his church most consistently.

The union's relationships with religious leaders also put it in some tension with other faith-based community organizations in the area. The Industrial Areas Foundation (IAF)—an organization founded by Saul Alinsky that remains one of the most well-known progressive community organizing models in the country—had a fledgling chapter in the county and was in some ways a natural partner for the union. IAF organizers had relationships with important Catholic religious leaders in the area and were beginning to work more intensively with laity within these congregations as well. The union had staff members and financial resources that could help the IAF build its organization in the county and an interest in deepening its own involvement in the religious community.

In practice, however, an alliance was more difficult to strike on the ground.[5] The IAF model begins by having congregants deepen their relationships with one another through an extensive process of "one-on-ones" and "house meetings." One-on-ones are meetings between individuals in which people intentionally establish relationships with one another. House meetings are meetings organized by a leader in his or her own home, in which he or she invites a group of people to discuss some issue or deepen their relationships with one another. Through these different strategies of relationship building, IAF organizers help congregants identify common interests around which they can organize.[6] With the support of the IAF, one local Catholic church had recently spent over a year organizing the church's centennial celebration. The IAF organizer's theory was that organizing this celebration would give the congregation confidence to tackle an issue of broader public concern.

Although the union also believed in using one-on-ones and house meetings to deepen relationships, the union's issue—namely, workers' desire

to form a union at Santa Rosa Memorial Hospital—was not up for negotiation. Although most union organizers shared an understanding of the importance of relationships to their work, the union had its own agenda and its own timeline. Moreover, union organizers tended to think that a clear goal enhanced the possibility of deepening relationships by providing a sense of urgency to people's work. The IAF criticized the union's desire to turn out religious leaders for public legitimacy without deep ties to the congregations of which the leaders were a part. The union tended to see the IAF as unfocused and unreliable, since IAF organizers refused to commit to particular "turnout" numbers for union events or to deliver specific, measurable results for the union.

At one point in the Memorial campaign, the union attempted to organize meetings within congregations, with the idea that these would build toward a large religious vigil several months later. The union thought that these meetings would inspire people to commit to turning out for the larger vigil. Those religious activists with IAF experience, however, thought this was disingenuous. One lay leader said that it "felt false," since house meetings—according to the IAF—were "only supposed to expand relationships, not get people to turn out to anything." At our "kickoff" meeting for the house meeting drive attended by fifteen or so religious leaders, a minister with the IAF facilitated. Beforehand, we had agreed that he would work to motivate the other leaders to have their own congregation meetings. In the middle of the meeting, however, he shifted course and allowed the meeting to end without anyone having committed to meetings within their congregations. In the end, union organizers and IAF organizers worked separately more often than they did together and occasionally—in moments that highlighted the absurdity of their failure to work together—would pass one another in church hallways for consecutive meetings with religious leaders.

Story Training and Workers' Symbolic Role

As the campaign shifted from the workplace to the community at large, workers came to play a more symbolic role. This is not to say that workers' cultural practices were insignificant as they recruited other workers to take part in the union effort initially, but rather that workers' capacities to

represent themselves symbolically took on even more importance as the campaign moved to the religious arena.

Ross discussed the different philosophies within the union about how to run "fair election" campaigns. Some argued that since workers would not be voting until after an agreement was reached, organizing workers should not be a priority. He strongly disagreed. In order for the community campaign to be "authentic," he argued, the worker voice needed to be strong. The community at least needed to feel as though workers were leading the way. As Purcell wrote, "Workers' participation granted the campaign moral authority in the face of 'corporate campaign' charges and St. Joseph Health System management and sponsors' claims that workers did not want or need a union."[7]

This lesson was highlighted for Ross as he encouraged Monsignor Brenkle to become more involved in the campaign. Brenkle had been reluctant to get involved in the campaign because, according to Fred, he "had been friends for thirty-five years with some of the leaders inside St. Joseph's and he didn't want to risk that friendship." Yet in early 2006, as the union began to campaign for election ground rules, the CEO of St. Joseph Health System, Deborah Proctor, asked to set up a meeting with Brenkle, the diocese's bishop, Santa Rosa Memorial's CEO George Perez, and the system's theologian. The bishop, still reeling from the diocese's recent sex scandal, told the three SJHS executives, "What I don't need is another controversy. I want to see this settled quietly and out of the public." Brenkle remembered Perez responding, "Well, bishop, it's not a problem because I can't think of more than twenty people who would even care about a union." Unbeknownst to the executives, however, Ross had armed Brenkle with a petition recently signed by eighty-seven union supporters (which the union had also sent to Perez). Brenkle asked Perez, "Do these eighty-seven people work for you?" and left the meeting thinking the hospital leaders "[didn't] know [their] people."

In this meeting with St. Joseph Health System leadership, Brenkle was also led to believe that the system would negotiate election ground rules if a new majority of workers at Memorial expressed interest in organizing. Although Ross was skeptical, he knew that "Brenkle [was] ready to go to the mat on this, and he [could] bring the bishop along." As worker leaders began collecting their co-workers' signatures again, according to Ross, Brenkle became more invested in the campaign, "would want to get updated on a

weekly basis," and "began to get creative." Brenkle became a powerful ally because the union demonstrated workers' support: "We'd have no credibility if the workers had not gone out and gotten a new majority."

I learned about the importance of worker stories the hard way during my first religious "support committee" meeting. I had assumed that workers needed to focus on their workplace, and so I made little effort to ensure a good worker presence at the meeting. By the time the meeting started, there were fifteen religious leaders and no workers. José, a young Latino immigrant and kitchen worker at the hospital, arrived late and froze when invited to speak, having never spoken before a large group before, let alone a gathering of religious leaders. Nevertheless, I thought the meeting had gone well, and was surprised to get a call a few days later from a Catholic priest who "hadn't cared for it." When I probed, he continued, "Well, it's just a bunch of liberal progressive people who are trying to strategize for the workers, so I'm going to withdraw my hat until I feel like this is something that workers want."

Workers' stories and experiences were critical for generating support within the broader community. Although several scholars of social movements have highlighted the importance of storytelling or narrative to movement success, few have examined the ways that social movement actors learn to tell their stories—through an educative process.[8] Organizers spent a great deal of time coaching workers about how to tell these stories persuasively, and institutionalizing worker stories in order to pass them on to allies. As I was preparing to bring a worker to meet with a religious leader, an organizer instructed me to make sure the worker told a particular story—one in which a supervisor told her that the union "wanted to sink their fangs" into the hospital. The organizer was worried that the priest might not understand the worker's Spanish accent, however, and so wanted me to "make sure [the priest] hears the 'fang' part." During another event, the union's videographer stood directly in front of a speaker while she began crying as she recounted the intimidation she felt from managers. An organizer told me that she thought the event lost its "authenticity" when it seemed like a "photo opportunity" for the videographer—that the drama on camera came at the expense of people's experiences at the event.

From one perspective, it is easy to see the process of story training as manipulative. But, as a union leader pointed out, most people "get paralyzed when you deal with power." Even more generally, most people do

not have experience telling their personal stories in a public way. Only a year or so after José had frozen at my religious support committee meeting, he had become a powerful voice on behalf of the union as a result of working with union organizers—testifying at a congressional roundtable on the need for labor law reform, speaking in front of hundreds at rallies, and defending himself and co-workers in meetings with supervisors. On several occasions, before workers met with system leaders, union leaders would role-play the meetings so that workers could practice "claiming [their] story." Like anything else, articulating one's experiences and communicating one's emotions take practice.

Workers' stories served both affective and cognitive purposes. Emotionally, the stories "humanized the conflict and its impact on workers and their families," as Purcell put it. Yet the stories were also carefully documented and organized as evidence to prove the union's "case" to the public. Although the hospital argued on multiple occasions that the antiunion conduct was the work of isolated "bad apple" managers, the union's compilation of stories revealed an indisputable pattern of antiunion behavior. A website run by the union contained an updated chronology of the system's antiunion conduct, including "specific references to NLRB ULP [unfair labor practice] findings, anti-union power points, and worker and allies' testimony."[9]

If the deliberate production and documentation of stories made them slightly less spontaneous, the institutionalization of stories was essential to workers' new role in the campaign. Workers' capacity to motivate religious leaders to action rested as much on their capacities for storytelling as on their aggregate numbers. And while the most powerful stories were told in the context of relationships, the union could reach a national audience through the collection and dispersal of the hospital's most egregious behaviors. In the fall of 2005 and again in the fall of 2007, the union produced reports that featured individual workers' stories—their reasons for wanting a union, and the hospital's concerted attempts to stop them. In the second report the union enclosed a DVD compilation of workers' stories and allies' arguments.

Enactment: Putting Union Theology into Practice

The union also explicitly framed its events as part of a coherent narrative, choosing dates for events that would help tie the struggle to historical

victories. After the Orange County blitz in February 2007, for example, the union held its founding organizing committee meeting in Orange on Cesar Chavez's birthday, March 31. In her summary of the campaign, Eileen Purcell discussed how the union "consciously reinforced our message by careful choice of symbols."[10] The symbol of a peace dove, used on posters and cards in preparation for one "procession" in the fall of 2007, was "an explicit effort to lift up hope for reconciliation."[11] The slogan, "Our Values, Our Voice, Our Choice," was intended "to emphasize workers' pride in SJHS as an institution and their commitment to the shared values of 'dignity, excellence, service, and justice.'"[12] The climax of the campaign—a weeklong vigil outside the Sisters' motherhouse in July 2008—coincided with the thirty-fifth anniversary of the United Farm Workers' strike in Fresno, California, during which several Sisters of St. Joseph of Orange went to jail with striking farmworkers.

The union's rhetorical and symbolic strategies were debated and discussed intensely among union leadership, but they could not be carried out without the consent of lower-level organizers and worker leaders. At one point two veterans of the United Farm Workers, Reverend Chris Hartmire and Jerry Cohen, took center stage. Chris Hartmire was a Presbyterian minister who had spent more than twenty-five years leading the National Farm Worker Ministry in support of the UFW. In 1999, Hartmire had also led the Sacramento Fair Election Committee during the CHW elections. Jerry Cohen had been chief counsel for the UFW and later for Neighbor-2-Neighbor. Both were close friends of Fred Ross. Together, Hartmire and Cohen fleshed out an idea that workers participate in a fast to win a fair election agreement from the Sisters. Over the course of a weekend retreat, they described the historical roots of the fast and distinguished a "fast" from a "hunger strike."[13] During their presentation, they argued that a fast was expressive—a moral act—whereas a "hunger strike" was instrumental, intended merely to accomplish an objective. Yet the distinction seemed lost on the younger staff, who continued to question the "authenticity" of a fast given that we *did*, in fact, want to convince St. Joseph Health System to change its practices. Workers had doubts about the fast as well. Brandon recalled that workers "thought it was a terrible idea. . . . Most people were like, 'That's crazy, we're not going to do that.'" A weeklong vigil took the place of the fast.

What to call the campaign's *goal* was up for debate as well. Organizers in Santa Rosa had expressed concern that the term "fair election

agreement" sounded as if it referred only to the *day* of the election, whereas the union was most concerned about the period leading up to the election. During one meeting at union headquarters, several members of the union's communications staff helped brainstorm a new phrase. "Fair election campaign" had been the phrase of choice among several organizers, but it was rejected by the organizing director who felt that use of the word "campaign" might legitimize the hospital running an *anti*union campaign. "We don't really want them to be able to campaign," he said. A member of the communications staff wondered aloud whether any polling had been done on the phrase that resonated most with workers. And while "free and fair election" had polled best in Ohio, it was unclear whether the same would be true for workers at Santa Rosa Memorial Hospital. Unable to come to a conclusion during that meeting, we continued to use "fair election agreement" in most of our literature.

Finally, the union struggled with how to refer to the Sisters' failure to abide by Catholic social teaching. It was Monsignor Brenkle who came up with the term on which the union would settle: "disconnect." As a union leader explained to me, "I thought it was just one of the most brilliant things I've ever learned about how to call somebody out as being a hypocrite without using the term 'hypocrite.' The 'disconnect' means you can connect it … and that's why it's so brilliant. I guess it takes seventy-five years to learn certain things." Another organizer explained in slightly different terms how calling on the Sisters to live up to their values would make it easier for the union to achieve its goals:

> In a campaign like this where you're trying to force an institution to do something they don't want to do, if they claim to have values and you can put what you want them to do in terms of their values, it's an out for them. They can be like, "We're going to follow our values and do the right thing." Rather than, "We're just going to capitulate to this organization that's been trashing us for the last couple of years."

The union would be disciplined about how it spoke about the campaign, framing it in such a way as to make reconciliation possible. Not only would this give hospital leaders a face-saving way of conceding to the union, but it would also leave open the possibility of a working partnership in the future.

Turning Texts into Tools

One union leader described the campaign within the religious community as a process of "information organizing," or making the union's own interpretation of Catholic social teaching increasingly legitimate within the religious community as a whole. The significance of this teaching to labor organizing in Catholic healthcare was exemplified by the formation, in 1998, of a "subcommittee on Catholic Healthcare" within the United States Conference of Catholic Bishops (USCCB) that included national labor leaders, hospital administrators, and bishops. The committee's purpose was to make recommendations for Catholic hospital systems facing unionization drives. The committee's formation had been requested by Sister Mary Roch Rocklage, president and CEO of the Sisters of Mercy Health System in St. Louis, in the midst of the contentious Catholic Healthcare West campaign.[14] Over the course of the next year, the committee would hold a series of meetings. The result, issued in May 1999, was a "working paper" entitled *A Fair and Just Workplace: Principles and Practices for Catholic Healthcare*. The document clearly stated the value of unions as reflected in Catholic social teaching and recommended the adoption of ground rules at the front end of organizing drives like those the union was advocating.

The working paper quickly became a focus of attention among Catholic health systems and labor unions. It was debated in formal hearings sponsored by Catholic dioceses, and received national media attention.[15] Labor unions tended to consider the working paper a victory, despite their recognition that it was a "compromise document," and did not include language supportive of employer "neutrality," or of "card check" elections—a process by which workers are able to unionize without a vote if a majority sign cards. Healthcare administrators and sisters involved in Catholic hospitals, however, repudiated the document, alleging that the working paper misinterpreted Catholic social teaching and that it failed to outline mechanisms that would hold labor unions accountable for their actions. Nevertheless, in April 2001 the working paper became a model for the election process agreed to by SEIU and Catholic Healthcare West. It seemed to many in organized labor that a new model might be on the horizon.[16]

But despite the "partnership" between SEIU and CHW, and despite ongoing work by the USCCB subcommittee, the working paper remained a source of contention in the St. Joseph Health System campaign. In 2005,

at the suggestion of Monsignor Brenkle, the union had "published" the working paper as an official-looking pamphlet, which it distributed widely to Catholic leaders and community supporters in an effort to put pressure on St. Joseph Health System. The system responded by working to undermine the document's importance. In 2006, Sister Katherine Gray and CEO Deborah Proctor traveled to Spokane, Washington, to meet with Bishop William Skylstad, the national chair of the Conference of Catholic Bishops at the time the working paper was written. Upon return, they reported that the guidelines were not official policy of the council, and that—in fact—not a single diocese in the country had ratified them.

In response, Ross and Purcell suggested to Monsignor Brenkle that Santa Rosa become the first diocese in the country to formalize the working paper as official diocesan policy. And so with Monsignor Brenkle's blessing, in January 2007 Ross and Purcell attended a meeting of the Santa Rosa Diocese's Priests' Council and presented the council with a proposal to adopt the working paper. Unfortunately, Monsignor Brenkle was unable to attend the meeting, which meant that the union's biggest advocate in the diocese was unable to speak on the union's behalf. Ross and Purcell were also caught by surprise when a priest whom they did not know spoke up in the meeting to say that the conflict was "not any of the diocese's business." It turned out that this priest had a biological sister who was a Sister of St. Joseph of Orange. The priest's intervention put the proposal on hold, as the Council decided to invite representatives from St. Joseph Health System to give their perspective. Still, after three representatives from SJHS came to speak at the next month's council, the diocese voted 11–1 to adopt the working paper. In an op-ed by Brenkle published on May 11, 2007, he announced, "The Santa Rosa Diocesan Priests' Council voted in favor of [the working paper's] adoption in March, and Bishop Walsh confirmed that recommendation. The diocese is committed to using these guidelines, and we encourage St. Joseph Health System to follow suit."[17] Within the next few months the diocese would begin discussions with union organizers and thirteen of its cemetery workers about ground rules for a union election; educators in the diocese's Catholic schools were also promised the same. St. Joseph Health System did not follow suit, however.

Between 2004 and 2005, as the St. Joseph Health System campaign began, Catholic hospital organizing campaigns were intensifying in Ohio, Illinois, Oregon, and New York. As tensions mounted and the conflicts

between Catholic hospital employers and unions continued, a meeting was set for the bishops' subcommittee in June 2006. In the meantime, the CHA's newly appointed president, Daughter of Charity sister Carol Keehan, agreed to allow SEIU to attend the annual CHA convention in Orlando, Florida, which was meeting the week before the scheduled subcommittee. Workers from St. Joseph Health System and other systems joined several union leaders at the convention. During this convention, for the first time, Sister Katherine and Deborah Proctor met with workers from Santa Rosa Memorial Hospital. But despite this small breakthrough, the CHA meeting also revealed the depth of the mistrust between labor and the Catholic healthcare industry. One of the Memorial workers was threatened with arrest for passing out a written appeal for dialogue to bridge the divide and join together in a common cause, after CHA staff reported that SEIU was irreverently leafleting the plenary. As a result, Sister Keehan broke off all contact with SEIU and the USCCB subcommittee. The subcommittee meeting was postponed.

It was not until 2007 that the bishops' subcommittee reconvened, with several bishops, labor representatives, and sisters and hospital administrators from those systems (including SJHS) that were enmeshed in labor organizing struggles. Yet in the fall of 2007, the CEO of St. Joseph Health System, Deborah Proctor, withdrew from the national table, citing the union's "corporate campaign" against the system. Her withdrawal was in direct violation of a commitment among all parties to refrain from bringing local conflicts to the national table. Within the St. Joseph Health System campaign, hopes for a settlement at the national level waned.

Building legitimacy within the religious community also involved appeals to recognized Catholic scholars who might support the union's perspective. Joseph Fahey became one of the most important of these scholars. A professor of religious studies at Manhattan College, Fahey had recently helped organize Catholic support for workers seeing to unionize with AFSCME at Chicago's Resurrection Hospital System. In the aftermath of this effort, Fahey began working with other Catholic scholars to found a national group, Catholic Scholars for Worker Justice.

As Fahey launched this initiative, in January 2008, Purcell invited Fahey to meet with workers at St. Joseph Health System. During his visit to California he also met with SJHS ethicists Jack Glaser and Kevin Murphy. His visit coincided with a vigil outside Santa Rosa Memorial Hospital,

at which he spoke on the rights of workers to organize. The next day the *San Francisco Chronicle* printed an article on the vigil and a photo of Fahey above a caption that described him "fir[ing] up the crowd."[18] A testy back-and-forth ensued between Glaser and Fahey. Glaser wrote an e-mail to Fahey in which he admitted feeling betrayed, since Fahey had not disclosed that his trip was arranged in large part by the union. Fahey wrote back to say that he had no obligation to disclose his other activities during his visit. Each implicitly questioned the objectivity of the other, suggesting that the other's theological position was a result of their more secular interests. Fahey would return from California even more determined to build a coalition of like-minded scholars. Within a year he had organized a group of approximately two hundred scholars.

Going Public

As the prospects for establishing ground rules on the national level dimmed, the union sought to amplify the theological debate as widely as possible to maximize pressure on the Sisters. In February 2007, in Santa Rosa, the union organized a full-page ad supporting the union signed by local religious leaders and laypeople that was printed in the *Santa Rosa Press Democrat*. Sister Katherine Gray personally called each of the Catholic priests who had signed the advertisement to explain her position—which the union took to mean that it was doing something right.

The union's media strategy was made up of both "earned" and "paid" media coverage—"earned" meaning stories written about the union, and "paid" meaning advertisements bought by the union. Union leaders thought of their media strategy as a mini campaign. When the main local paper, the *Santa Rosa Press Democrat*, failed to cover a well-attended congressional hearing on the Memorial campaign that the union had organized in May 2007, for example, a union leader called the paper to seek recompense. The paper offered to publish an op-ed by Monsignor Brenkle in which he announced the diocese's adoption of the U.S. Conference of Catholic Bishops organizing guidelines. In Southern California, the union broke into the Spanish language media with stories of Latino worker leaders who had been threatened by managers as a result of their activism.

Over the course of the next two years, calls for election ground rules by prominent religious and community leaders mounted. In August 2007 the union produced an extensive report and DVD that exposed the system's antiunion activities in both Santa Rosa and Orange County, highlighted the Santa Rosa Diocese's adoption of the Council of Catholic Bishops guidelines, and suggested the need for "fair election" ground rules. The union sent the pamphlet to national Catholic, Protestant, and Jewish leaders. In response, St. Joseph Health System published full-page advertisements in eight California newspapers, and sent DVDs of their own to twenty-one thousand of their hospital workers that praised SJHS and congratulated workers for the system's recent Gallup Great Workplace Award.

On September 20, 2007, the National Coalition of American Nuns (NCAN), one of the more progressive coalitions of nuns in the country, issued a statement supportive of workers' organizing efforts. On October 19, the renowned theologian Rosemary Radford Ruether published a piece in the *National Catholic Reporter* reporting on both sides of the struggle within St. Joseph Health System.[19] Some union leaders seemed to think that Ruether's article was weak, leaving the reader with a feeling of "he said, she said," but the article had an impact nonetheless—the union would later learn that the Sisters and SJHS leadership were "devastated" by it.[20] Alongside these opinion pieces, Orange County media started paying attention to the campaign as well. In August 2007, coinciding with the release of the union's report, the *OC Weekly* (Orange County Weekly) began a series that would culminate in a front-page story about the campaign that November.[21] The more conservative *Orange County Register* began covering the campaign as well.[22]

The campaign reached a crescendo in July 2008 with a weeklong vigil in front of the Sisters' motherhouse during the Sisters' annual gathering. Encouraged by the union's media staff, reporters from the *New York Times*, the *Los Angeles Times*, and National Public Radio all covered the event. As Ross recalled, at the beginning of the vigil, workers had asked the Sisters for a meeting but were told that the Sisters were deep in prayer and reflection and so were unable to meet. But then a reporter from the *New York Times* came out for a day "and all of a sudden [Sister Kit] is able to come out of prayer and reflection and meet with him and the CEO and [the human relations director]." The *L.A. Times* was given the same access. For one union leader, the picture of the St. Joseph Health System leadership

in the *L.A. Times* was "worth the price of gold." For the first time, they seemed "stern and angry and before that they'd always had this phony façade." Much of the media coverage discussed the conflict from the perspective of both labor and management. But even more important than the content of the coverage, for many union leaders, was the fact that they had successfully broadened the scope of conflict, and made the campaign at St. Joseph Health System a national story.

Throughout the campaign there had been signs that St. Joseph Health System was feeling the pressure. In late 2006, as the "fair election" campaign began to escalate, SJHS issued a unilateral "Code of Conduct for Third Party Representation Discussions." This document outlined the steps it would take to ensure a fair election, short of negotiating with the union. In the code of conduct the system committed itself to providing "factual" and "honest" information to employees, and promised it would not "hold mandatory meetings for the sole purpose of discussing our views on third-party representation."[23] As the campaign heated up in 2007 and 2008, the system went further, pledging not to use "union avoidance law firms," and promising not to use one-on-one meetings instigated by supervisors to discourage unionization. Nevertheless, the system consistently refused to negotiate such ground rules with the union; refused to outline steps it would take to provide union organizers and prounion worker leaders access to workers; would not discuss any process by which public materials might be reviewed by the other side; and—most important—refused any sort of outside or third-party enforcement of their commitments.

And then finally there was a breakthrough. On July 15, 2008, Catholic Scholars for Worker Justice issued a public statement to Sister Katherine Gray calling on St. Joseph Health System to negotiate election ground rules. In August, Sister Katherine responded to the scholars and for the first time expressed a willingness to negotiate ground rules once 30 percent of eligible workers had expressed interest in unionization—not only at Santa Rosa Memorial Hospital, but at any SJHS hospital. As union leaders and SJHS executives prepared to sit down at the negotiating table, the union kept the pressure on, paying for a series of four advertisements in the *National Catholic Reporter* in the summer and fall of 2008. For Labor Day, Sister Amata Miller, an economist and former board member of Catholic Health Initiatives, one of the largest Catholic health systems in the country, published an article in *America*, a weekly Jesuit magazine,

entitled "Organizing Principles: Why Unions Still Matter." It seemed that a settlement was within reach.

Getting the Message

For union leaders, the system's agreement to negotiate "fair election" ground rules was powerful evidence of the campaign's success. As recently as June 2008, when four California bishops had sent a letter to St. Joseph Health System leaders urging them to negotiate, the system had refused. But by August, after national press coverage and growing attention within the Catholic Church, the system had agreed.

Nevertheless, system leaders claimed their changing position was not a concession to union pressure but was part of an ongoing process of "discernment." One system executive explained, "I honestly believe the reason we got to the point was we had dialogue and we learned a whole lot more about each other." He suggested that because he and union leaders were able to talk "as people," instead of "shouting from buildings five miles apart," union leaders and system executives were able to find common ground. When I responded that the change in the system's position seemed to correspond with the crescendo of the union's campaign, he demurred: "We didn't respond to that because it's not in our tradition to do that. But we also had dialogue during that period of time. . . . Not that we were forced because of this campaign, because we were stalwart in that campaign, and we were going to continue with our values regardless." According to another executive, the Sisters' charism—which he termed the values "they hold themselves accountable" to—is "unity and reconciliation." Because of this orientation, the system "cannot live its charism without being in dialogue with people constantly about this, and trying to move us to places where we have some reconciliation, where we have some unity. And that's really been our goal all the way through this." One ethicist for the system suggested that "this pounding adversarial [relationship] really doesn't get us where we need to get to."

Perhaps it is not surprising that SJHS executives denied conceding to external pressure even if—in November 2008—they made the cessation of public advertisements and public actions a condition of negotiating ground rules. Nevertheless, it would be simplistic to argue that SJHS executives

were merely dishonest in their account of their internal process. Indeed, throughout the campaign they had been willing to dialogue with union leaders and other interested parties. Of course it would be equally simplistic to accept SJHS executives' account of their "discernment" as taking place within a neutral space of dialogue and self-reflection, a space free from power relations. It was no coincidence that their discernment led to negotiations with the union only *after* the union had brought the system's contradictory position on Catholic social teaching to national attention. Union leaders pointed out that the willingness of St. Joseph Health System to dialogue always seemed a result of pressure. At those moments in the campaign when the union was not putting pressure on the system, the system's willingness to dialogue seemed to evaporate.

St. Joseph Health System was not made economically or politically vulnerable by the union's campaign; the system did not concede based on a narrow conception of the corporation's interests. For the leaders of the system, however, who considered themselves the stewards of the legacy of the Sisters of St. Joseph of Orange, the contradiction between this legacy and their antiunion practices had become untenable.

But despite the union's success at winning negotiations, there were other more ominous messages lurking in its aftermath. When the *New York Times* covered the St. Joseph Health System campaign in July 2008 it was the first time in a decade that an SEIU healthcare organizing campaign had gotten such prominent coverage. But when Ross and Purcell sent a report about the press coverage to the international union, they did not get so much as a phone call in response. By the end of 2008, Ross and Purcell argued, the St. Joseph Health System campaign was the only existing religious healthcare campaign in the country that held any promise.[24] But aside from Ross and Purcell, who were still officially on the staff of the international union, the international remained uninterested in the breakthrough. In fact, behind the scenes, it appeared that the international was working to *prevent* the local's success. In the next chapter I explore the internal divisions within the labor movement that jeopardized workers' chances to win their union at Santa Rosa Memorial Hospital.