



TRAINING — FOR — CHANGE

Coaching as a Leadership Practice

Campaign Lab



*"How do I enable others to find purpose
in the face of challenge?"*



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Coaching as Resistance

For over a century, there has been a quiet war over how we learn. In the late 1890s, industrial elites realized that if workers learned to think for themselves, the factory system would crumble. They championed the 'Banking Method' of education: teachers 'deposit' facts into students, who are expected to remain passive 'receiving objects.' This method wasn't just for children; it became the default for how we run meetings and 'train' new union members today.

But a different tradition grew in the South. At the Highlander Folk School, Myles Horton taught that the coach's job is to 'bring forth' the wisdom already in the room. Septima Clark proved this by teaching sharecroppers to read using the laws being used to oppress them. Ella Baker, the 'Fund' (craftsperson), coached the young students of the civil rights movement not by giving speeches, but by asking the right questions. When we coach today, we are reclaiming that power

Why is coaching an important leadership practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching enables others. Organizing campaigns are rich with challenges and learning opportunities, but sometimes we are fish in our own water and we cannot see the challenges we are swimming in. Coaching in organizing helps to alleviate this problem. Coaching helps individuals to overcome motivational, strategic, and informational challenges that might otherwise hinder the progress of the individual, and/or the team, and thus the campaign or training.

What is coaching in organizing?

Coaching is a direct intervention in an individual or team's work process to help them improve their effectiveness.

Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns and trainings. Some examples of when coaching skills are necessary:

- Helping an organizer overcome motivational challenges with their volunteers
- Assisting a leadership team in creating strategy for their organizing campaign

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

Elements of coaching

Coaching requires learning to identify a person's or team's strengths and weaknesses to help them draw upon their strengths to overcome their weaknesses. People often know what they "should" do. But fresh eyes can help diagnose specific challenges they face while identifying ways to deal with them.

- **Motivational coaching (heart)** is intended to enhance effort.
- **Educational coaching (hands)** is intended to help acquire information or skills
- **Strategic coaching (head)** is intended to help evaluate how to use resources to achieve outcomes.

Coaching Approaches

Corrective

Some coaching is aimed at helping improve poor performance (i.e., the coachee is overall not doing the leadership practice well and needs help getting up to a basic level).

Developmental

Some coaching is aimed at helping the individual achieve mastery (i.e., the coachee does the leadership practice well and is ready to become an expert). Basic elements of coaching are the same (i.e., motivational, strategic, and informational), but coaching strategies may differ (e.g., consult by asking reflective questions to develop mastery vs. consult by providing expert feedback to illustrate errors in how they are thinking about the task).

Be aware this is not coaching...

Giving advice

Since good coaching should take a coachee beyond the limitations of the, coach, leader or mentor's knowledge it makes sense that your advice shouldn't be the golden tip. The golden tip is the one that the coachee will realize on their own that is even better than any solution that you could come up with. It is essential to avoid giving advice as a coach.

Leading questions

Leading questions is basically hiding your advice in a question format. If good coaching is all about asking the right question, that doesn't mean that ending with a question mark can make you get a way with an embedded advice in the question.

Examples:

- Have you tried to do xxxxxx?
- Will xxxx work in your situation?

Essential Qualities of an Effective Campaign Coach

We believe the most effective coaches don't just switch between styles, we also strike a balance between several qualities that support our coachees to get the most out of this as a learning relationship.

	Ineffective	Effective ("The Sweet Spot")	Ineffective
Elicitive	Only offering advice	Leaning largely on asking questions, and sometimes providing suggestions	Only asking questions
Directive	"I set the agenda"	Staying flexible in providing guidance on how to focus your time together, collaborating to set and change agendas	"I only respond to what comes up naturally"
Transparency	Always leading with my observations & opinions	Providing enough detail about your assessments so coachees have a sense of "what I'm thinking"	Never sharing my observations & opinions
Experience	"I'm the expert"	Offering stories about your experiences when appropriate, and what you've learned from them	"I know nothing"
Vulnerability	Always staying surface level	Balancing handling challenges identified by coachees with curiosity about "what else might be going on"	Always inviting coachees to reflect on deeper patterns
Taskiness	Meetings are "all business"	Balancing authentically connecting with coachees with the need to "get to work"	Meetings are "all small talk"

We encourage coaches to use this list to do an inventory, asking questions like:

- How much am I using open-ended questions and modeling curiosity in our coach time?
- How much "scaffolding" am I providing to coachees for our sessions in the form of an agenda or other structure, based on my assessment of their campaign's current status?
- How transparent am I being about "my take" on their work – do they think they have to 'read my mind'?
- How am I balancing providing insight into my experiences of campaigning while discovering the answers to their current challenges alongside them?
- How often do I invite coachees to "drop below the surface", and also reveal some of "what I'm wrestling with" as a person or a campaigner?
- How am I balancing building trust and inviting "small talk" or personal connection with "staying on task"?

Coaching Styles

Campaign coaching is similar to athletic team coaching in several ways – most obviously, the “players” (your coachees) are learning campaigning skills “during the regular season” (while planning and running a live campaign). But even more than a team head coach, we campaign coaches have to switch coaching styles to match what our teams need – some days, we might be more “cheerleader” than co-strategists, or might spend more time commiserating about how difficult it can be to be a full-time educator also trying to change local policy. Coaches often have more success when we’re thoughtful about the coaching styles available to us.

- **Curious Co-Conspirator** – Campaign coaches spend most of our time discovering “the right answers for right now” alongside the organizers we’re coaching
- **Expert Campaigner** – And campaigning is a complex skill to learn, and we draw on our experiences to craft questions, make observations and help them see more options for handling a challenge
- **Cheerleader** – We’re in charge of “noticing what’s going right here” and helping them access the motivation needed to keep going to the next mile marker past challenges that emerge
- **Head Coach** – We keep them moving from “scrimmages” (planning) to “the regular season” (launching a campaign) and towards “the playoffs” (campaign escalation)
- **Supportive Peer** – We’ve experienced how hard it can be, and can help organizers feel less alone during tough times (and help them feel proud of every small success)

Effective Campaign Coaching Is	Effective Campaign Coaching Is Not
-Showing up and being present to another person's experience and listening, with both your head and heart	- Being so prepared that you figure out all the answers for the coaches before you even hear or observe their challenges
- Helping the coaches explore and make sense of their challenges and successes and what they learned from it all	- False praising of the coaches or only focusing on their strengths because you do not want to hurt their feelings
- Helping the coaches to find solutions to challenges	- Solely criticizing the coaches for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coaches what to do

Coaching Pitfalls to Avoid

Some of the most common challenges of coaching aren't unique to campaign coaching, we've adapted some of these from *The Coaching Habit*.

- **Being Too “Hands-Off” with Campaign Planning** – Campaign coaches, especially when coaching via Zoom, have a tricky challenge: We want to earn the trust of our coachees, and follow them into the organizing terrain that seems most urgent and relevant, but in many cases we have more knowledge about the essential ingredients needed to launch and sustain a strong campaign. We encourage coaches not to “hold back” if our assessment is that the “cake isn't ready to bake yet”
- **Answering the Wrong Question** – Sometimes the campaign teams we coach want to focus on a surface-level challenge that may not be the most important to explore. Asking “And what else?” or “Which of these is the most important for our campaign right now?” can help identify additional layers or help a group prioritize
- **The Small Talk Tango** – We might spend too much time catching up or “circling the problem”. You can always draw attention to this dynamic: *“I feel like all of us here have more energy for ‘small talk’ today than usual, and I’m worried about impolitely rushing us into ‘getting down to work’... What do you think might be going on today?”*
- **The Default Diagnosis** – We might have a bias as coaches or coachees towards one way of approaching a challenge, like looking for the people who might be at fault, or being too focused on the problem itself as opposed to a behavioral pattern getting in our way.
- **The Ossified Agenda** – We sometimes get stuck using the same structure for coaching sessions over and over in a way that discourages learning. We recommend “mixing up” your approach to time with coachees if it seems like they aren't developing as many insights or taking as many risks
- **Using “Advice with a Question Mark Attached”** - Questions like “Have you thought about...?”, “What about...?”, “Did you consider...?” aren't effective for inviting reflection and learning – they are suggestions followed by a question mark.

Campaign Coaching Tools

Coaches have plenty of tools for helping strategists-in-training develop insights, identify more options “under the bright lights” of an active campaign and develop strong organizing teams. And we think five tools are most useful for helping develop organizers as campaign strategists:

- **Questions** – What’s the insight you want to *tell* someone? You can almost always reverse engineer a *question* that might lead them to discover it for themselves.
- **Observations** – Sometimes drawing attention and inviting curiosity to a key dynamic you’re noticing is enough to generate learning.
- **Stories** – “We don’t know what we don’t know,” and your stories about having traveled similar paths will help your coachees sidestep common stumbles, identify options available to them, and your stories of unexpected victory will inspire their confidence and motivate them to keep moving forward
- **Feedback** – Sometimes your honest assessments, paired with an empathetic suggestion, are what will most help your coachees move forward: *“I’m really worried this is going to come off wrong, but I see you getting in your own way, by constantly focusing on what’s not working here. I’ve been there! We’re often surrounded by negativity in our school buildings. But unless you find a way to focus on what’s going right, I don’t think a lot more coworkers are going to say ‘yes’ to taking action...”*
- **Suggestions/Advice** – Advice is the least likely to develop our coachees into strategists, capable of making the many assessment-driven decisions needed in the “heat” of any campaign. But there are moments when our suggestions are what’s needed, particularly when “coaching for performance” rather than “coaching for learning.”

Tell stories & ask questions to...

- Help them imagine “getting to the playoffs”
- Help them remember their “stake”
- Cheerlead to “the finish line”
- Gain awareness of their strengths and how they’re overcoming challenges
- Reflect on what they’re learning

Offer observations to

- Help them notice “what’s going *right* here”
- Boost their confidence
- Notice what’s going on with other “teams”
- Acknowledge challenges, effort, persistence

Selecting Stories & Anecdotes

We encourage campaign coaches to periodically review stories we can bring to coaching sessions that might inspire new insights or sharpen our coachees' strategic thinking. **Here are some “cues” for searching through the stories you know:**

- The political geography of this particular place
- The composition of this group (identity, roles, (un)willingness to take risks)
- The target selection challenge they're currently facing
 - Go after the “villain”, our opponent
 - Focus on a target who is currently “neutral”
- Hesitation to engage in conflict with a target
- The unexpected alliances that formed in the “heat” of a campaign
- The relative strength or weakness of the targets themselves
- The need to recruit a new constituency in order to build the power to win
- The campaigning “posture” or tone (playful, confrontational, “cheering on” targets, determined, etc.)

Craft of Campaigns Podcast

Stories and lessons from issue-based action campaigns, beyond one-off mobilizations and single election cycles. In each episode, we interview organizers about how a campaign unfolded, strategy decisions, and lessons for our current moment. Each episode includes a transcript and writeup of key take-aways.



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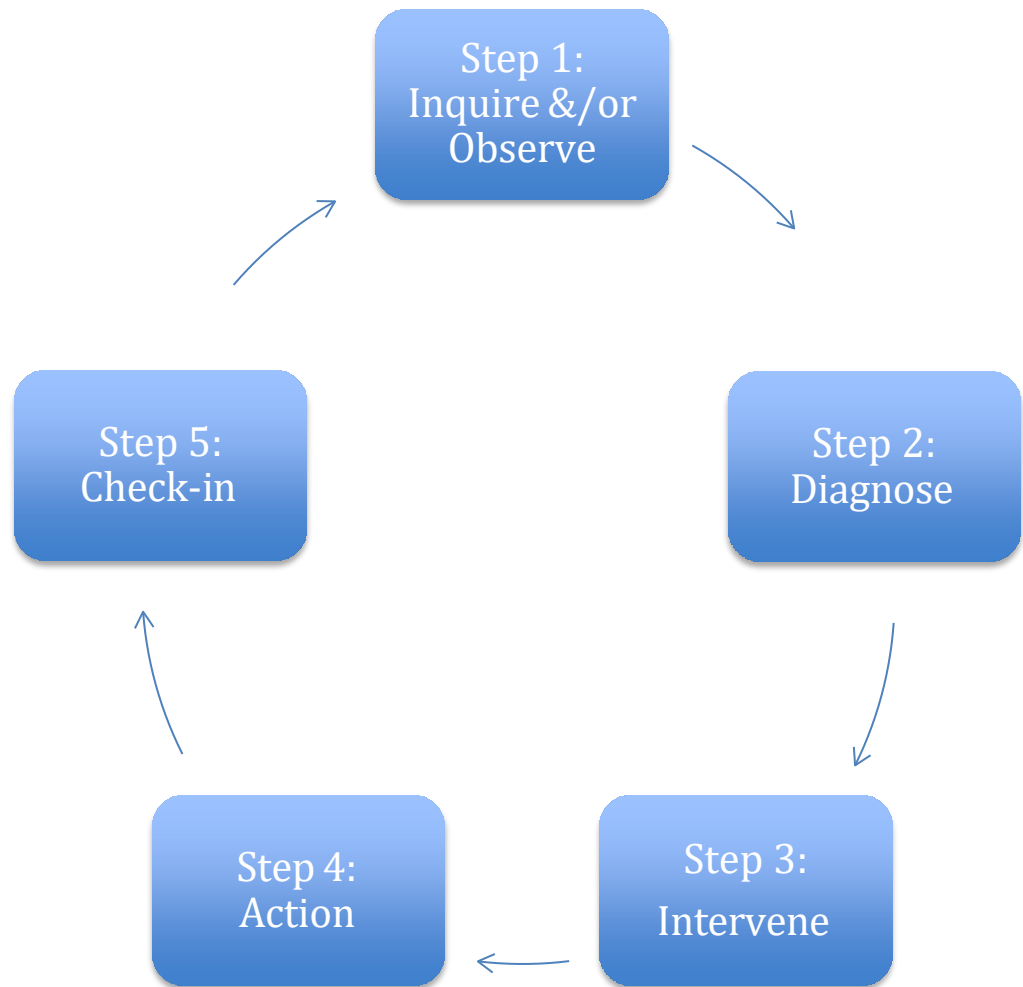
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Following this simple, 5 step coaching process can help you dive in and begin your coaching practice:

5 Step Coaching Process



1. Inquire &/or Observe - What do I see and hear?

When you are observing a person's actions in the field or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. As a coach, you need to take time to dig deeper. Are you seeing all the angles here? What information is missing? Think about the "who, what, why, how, where, when" questions.

- **Motivational (heart):** Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she's embarrassed? Is he quitting too soon because of frustration or fear?
- **Strategic (head):** Is the individual struggling because the goals are not achievable? Or because they're not thinking creatively enough about how to use the resources they have to meet goals? Or because the overall strategy doesn't make sense and needs to be clarified or adapted to their situation?
- **Skills-based (hands):** Is the individual struggling because of not being able to muster the behavioral skill to execute effectively? Does he not have the skill in his repertoire? Is he getting interference from other habits and behaviors (like someone well-versed in marketing speak may think that skill set is a substitute for authentic story-telling skills)? Is there something you could model, or that this person that just needs more help practicing and debriefing?

2. Diagnose & 3. Intervene: Which form of coaching does this require? How will I intervene?

		
If your diagnosis is that the individual needs to put in more intense effort, choose a <i>motivational</i> intervention, – for example:	If your diagnosis is that the individual is not <i>understanding</i> the focal practice adequately, or thinking about it appropriately, choose a <i>strategic</i> intervention – for example:	If your diagnosis is that the individual lacks <i>execution skill</i>, choose an <i>educational</i> intervention – for example:
○ Encouragement and enthusiasm—you can do it! ○ Helping the individual understand and confront fear, embarrassment, or other emotions that get in the way of the willingness to try harder or persist in the face of setback ○ Incentivizing, rewarding and praising courage ○ Modeling courage and emotional maturity in your own behavior, confessing fear and explaining how you move toward it rather than away ○ Kick in the pants (offered with love) ○ What else?	○ Asking good questions about how the individual is thinking about the key leadership practice – “Why did you choose to do this and not that?” – Based on where you are now what resources could you draw on to take this story/team/strategy to the next level? ○ Offering your assertions about what you are observing and how you think the individual might fruitfully think about the practice differently – “When you stop at that angry point in the story, I think you may be forgetting that your listeners need a reason to hope in order to be called to action.” ○ Offering the opportunity for silent reflection and self-diagnosis – “Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”	○ Model the behavior and invite the coaches to imitate you or work side by side with you to get the “feel” of the activity ○ Break it down into smaller parts and invite the individual to try one at a time ○ Practice, feedback, repeat ○ Offer three or four different practice exercises and observe which ones “take” for that person ○ Repetition, repetition, repetition ○ What else?

3. Intervene – What do I do?

Once you think you've figured out what the problem is don't just tell the coachee what you think they should do! Find out what they think they should do? Ask questions that enable the coachee to see the problem, and for you to see how the coachee sees the problem, and discern a way to solve it. Get the coachee's views out on the table. The appropriate intervention depends on the diagnosis.

If the challenge is **motivational**, you can:

- Encourage and exhort—you can do it!
- Offer a kick in the pants (with love)
- Help the person confront his or her fear, embarrassment, or other emotion that may get in the way of their ability to risk acting, persevering, trying new things. Communicate with empathy, hope, and affirmation of the coachee's self-worth. Reward and praise courage
- Model courage and emotional maturity in your own behavior confess fear and explain how you move toward it rather than away from it.

If the challenge is **strategic**, you can:

- Work through a specific example with the person, asking questions to guide the strategic process. Then reflect on the process itself, asking them to describe how it worked?
- Ask questions about how the individual is thinking about the practice ("Why did you choose that tactic?")
- Offer your observations, asking how the person might think about it differently ("At that point, were there other options? What might they have been? Why did you choose the one you did?")
- Offer feedback on what you are hearing, asking if that describes the situation, at the same time, offering possible reframing of it.

Use silent reflection and self-diagnosis ("Why don't you take a moment to think through what you believe is working and not working and let's talk about that?").

If the challenge is **educational**, you can:

- Model the behavior and invite the coachee to imitate you to get the "feel" of the activity
- Break it down into small parts and invite the individual to try one at a time
- Offer three or four different practice exercises and observe which ones "take" for that person.
- Suggest others with whom the person can practice.
- Suggest ways to figure out where to find the missing information.

4. Action: How can I allow the coaches to develop their leadership skills? What action will they take that would allow them to move forward?

- Avoid the urge to do it for them.
- Allow the coaches to try the intervention.
- Observe them in action and note observations for your debrief.

5. Check-in and Debrief: What do I ask the coaches to help them reflect on their experience?

- What went well?
- What are you challenged by?
- What are some possible solutions?
- What are your goals/next steps?
- Schedule periodic check-ins to support your coaches in integrating this new or revised solution into their regular practice.
- Find out from the coaches how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

The Craft of Coaching

The Craft of Coaching Includes the following:

- Questions vs statements
- Guideposting
- Emotional presence
- Holding authority
- Soccer vs ping pong.
- Strategy is also a fundamental element of the craft -- that is, choosing which content area you will dive in on.

Questions vs. Statements

- *Why are questions important?* – They allow the person to consider their own situation. They are engaging in reflection and the cognitive challenge of seeking solutions.
- *What do questions do for the coachee that statements can't?* – Statements are from the “other person’s” perspective. They are directive and from a position of expertise. Questions allow the person to use their agency to commit to act in the process of problem solving.
- *How might you as a coach strategically use questions to your advantage?* – Coaches use questions to discover the other person’s context, to help them see their role in the change they want to take, to help the person discover the resources they need. Questions keep the focus of developing power on the person and prevents the coach from becoming an actor in the change.

Guideposting

- Let’s the coachee know where they are going before they get there
- Be explicit about what you are intervening on

An example of this is saying directly, “I don’t see any assessment of how you are planning to center equity within your leadership team.” Then begin asking about their process and thinking around this “guidepost.”

Emotional Presence

- This is the practice of the Coach modeling vulnerability in their own campaign work
- The coach holds tensions in a productive way so that learning can happen

This might look like the coach leaning in, and pausing after an emotional response. It can sound like a coach saying simply, “I feel that with you.”

Holding Authority

- Tight leadership and focus - Keep the coachee on topic and answering the question you asked them to answer.
- Your role is to challenge AND support – Be direct. You are not coaching with love if you can not be precise, succinct, and direct in your questions and assessment.
- Keep time and Interrupt Productively – Time is a matter of equity. Hold coachee and yourself to the time set for the meeting. Don't be afraid to interrupt when the coachee is wandering away from your questions or the tasks of the meeting.
- Hold coachee accountable – Leaders are accountable for their commitments.

Soccer Vs. Ping Pong

- Soccer = Group Facilitation: Engage the whole group to reflect, resonate, and coach one another.
- Ping Pong = One-on-One Deep Dive: Use focused back-and-forth to explore vulnerability or key insights with the coachee.
- Be Intentional: Use clear, purposeful questions to guide group (soccer) time effectively.
- › **Balance Both:** Strategically alternate between soccer and ping pong to maximize group learning and individual growth.

Coaching Techniques

Coaching technique: Active listening

What is it?

- Pro-actively look and listen for what someone else is trying to communicate, while trying not to project our own thoughts and expectations onto them.
- Normally our understanding of a conversation is coloured by our own interpretations, experience and point of view. Our subjective view of what we've just heard might differ significantly from what the speaker wanted us to hear.
- We can come to understand how the speaker feels about a subject or situation.
- We hear through their words and tune into their underlying emotions, concerns and tensions.
- We can help the speaker formulate their thoughts and reassure them they are being listened to.
- Shows the speaker that we respect and value them and what they have to say.
- Allows us to focus on the core issues of a person's message and to understand them better as a result.

How to actively listen?

- Create a safe atmosphere for the speaker
 - Find a suitable space and deal with any distractions (turn off mobile phones, televisions, computers etc).
- Make any limits to your listening clear from the start
 - if you've only got a certain amount of time, say so.
- Show that you're listening
 - Signs of listening are
 - leaning toward the speaker
 - an interested facial expression
 - maintaining good eye contact
 - Facial gestures and small movements such as nodding our heads can show interest and support.

- Avoid signs of impatience such as looking at your watch.
- Make the mental space
 - Don't think about what you want to say but focus on your speaker.
- Use verbal cues
 - (questioning techniques) to draw out your speaker's thoughts
- Summarise and restate what's been said.
- needs constant practice

Coaching technique: Mirroring- reflecting back

Mirroring is the technique of reflecting back the EXACT WORDS that the coachee has just said and then leaving a room for silence. Hearing someone's words in another person's voice is a good way to hear yourself and build your thoughts further. It's a very powerful coaching technique that can let the other person reach a clearer place without having to do much effort as a coach.

Coaching technique: debriefing -Summarizing & Restating

- After listening to someone we can offer them a short summary of what we've heard.
- This is a way to show that we've listened
- This is a good way to check whether we've understood them.
 - How to:
 - Wait until the speaker has finished
 - Offer the summary tentatively
 - If we restate in bold terms such as: so you feel that... and we're wrong, not only do we show we haven't been listening, but we risk offending the speaker by misrepresenting them.
 - Better examples are:
 - You seem to feel that...
 - What I hear you saying is... is that right?
 - Would it be fair to say that you feel...
- Summarise succinctly
 - Boil things down into one or two short sentences.
 - This is essential if your summary is intended to clarify the situation and move a discussion on

Coaching for Performance or Learning Zones

Michael Bungay Stanier describes this tension as “coaching for performance vs. coaching for development”:

Coaching for performance is about addressing and fixing a specific problem or challenge. It's putting out the fire or building up the fire or banking the fire. It's everyday stuff, and it's important and necessary. Coaching for development is about turning the focus from the issue to the person dealing with the issue, the person who's managing the fire. This conversation is more rare and significantly more powerful. If I ask you to think back to a time when someone coached you in a way that stuck and made a difference, I'll bet that it was a coaching-for-development conversation. The focus was on calling you forward to learn, improve and grow, rather than on just getting something sorted out.

When you're coaching a “live” campaign, there may be times when it makes more sense to help a team or coachee quickly choose the best option, particularly in a high-stress moment. We think Bungay Stanier's invitations and questions can help us navigate coaching in the “learning zone” or the “performance zone”.

Questions for Choosing “Performance Zone” or “Learning Zone”

- Is this a moment for immediate action or reflection?
- What are the consequences of failure in this situation?
- Is there time and space for experimentation?

Coaching in the Learning Zone

- Suggestion: Use more open-ended questions to promote exploration and growth.
- Example: "What possibilities do you see that we haven't considered yet?"

Coaching in the Performance Zone

- Suggestion: Provide more direct guidance and feedback when necessary.
- Example: "Based on our current constraints, I think the second approach would be most effective."

Transitioning Between Zones

- Suggestion: Develop cues or rituals to signal zone shifts.
- Example: Use specific language like "Let's enter learning mode for a moment" to indicate a zone change.

The Art of Crafting Questions

Crafting great coaching questions can take practice. We suggest preparing in advance, especially when you want to have more options for yourself to support the group through more emotionally difficult challenges. No matter how much experience we have, it can be tough to avoid giving advice based on our “gut reaction”, and instead translate that into a question that might elicit learning.

Great questions...

- Are open-ended (not a ‘yes-no’ answer)
- Are answerable (not too complex or theoretical)
- Generate options, ideas, or insights
- Avoid being ‘advice with a question mark attached’ (“You should do this tactic next, don’t you think?”)

Example:

Coaching Challenge 	My “Gut Response” 	A Curiosity Underneath 	A Question I Could Ask 
<i>Team discouraged by a negative response to their ask from a secondary target they thought would be “an easy ‘yes’”</i>	<i>“Why is this such a big deal? Let’s move on!”</i>	<i>“Is there something I’m missing about what it means to them?”</i>	<i>“It seems like this was a big disappointment for you all. I want to know more about how it landed for you. What felt ‘big’ about it to you?”</i> <i>“And what would it take to feel like ‘we’re on the right track’ again?”</i>

Sample Questions for Campaign Coaching

Asking the right question can move mountains on a coaching call. Crafting great coaching questions takes practice, but it's a skill any coach can learn. It's often helpful to prepare questions in advance of a coaching session, especially when you anticipate emotional challenges or hard decisions coming up.

Effective questions are open-ended (not a 'yes-no' answer), answerable (not too complex or theoretical), and generate options, ideas, or insights of the organizer. And they avoid being 'advice with a question mark attached,' i.e. "You should do this tactic next, don't you think?"

Here are some example questions to use for your next coaching call. It's best to remix them for your particular context, and not to ask them all at once.

Open questions

- Longer reasoning or answers.
- TED:
 - Tell, Explain, Describe.
- Good for:
 - Open conversation
 - Detail.
 - Opinions, issues or experience

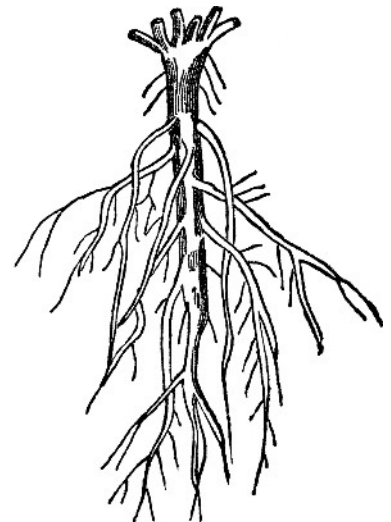
Closed questions

- Reduces options so as to receive a single word or very short, factual answer.
- Best avoided when a conversation is in full flow.
- Good for:
 - Check understanding.
 - Concluding i.e. a discussion.
 - Setting a frame i.e. introducing an issue.

Probing

Two step process:

1. Limiting scope
2. Asking an open question within that scope.



Funnelling

Refers to a sequence of specific questions that narrows down to a specific answer:

What, where, with whom, why, when (often with use of some closed questions). Refers to more of a sequence of questions



Appreciative inquiry

Ask questions based on people's own experience like:

- What have you experienced before that worked?
- What successes have you experienced ?
- Have you experienced a similar situation before? How was it?
- If you are to give yourself an advice, what would it be?
- From where do you get the courage and patience to continue?

Reality check

Coaching questions that help better evaluate the situation accurately and help see the positive side. Since often times few bad incidents can make us feel bad, and it's good to have a REAL sense of the problem. Also based on other historical experiences people can feel too affected or less affected about certain things.

Questions that can put numbers on challenges and measure quantitatively and not just qualitatively.

So we are talking about the challenge of X, how many incidents/ people are we talking about from how many total

Questions that can shed light on the half full of the cup to see the positive side not just the challenge to enable possibilities of solutions there:

- You are sharing the challenges when it come to X what do you consider a the success or strengths of X?

What if questions

What if questions open a light of possibility in the coachee's mind, for them to be able to see beyond the challenge. Examples:

- What if everything was possible what would you do
- What if you could make any decision, what would be your choice
- What if that xxx challenge was not there, how would things be different.

Support Questions

Questions for Sharpening Assessments

- How do you know that? What kinds of evidence do you have?
- When have you seen that happen?
- What would have to happen to change that?
- If you say "Yes" to this opportunity, what will you have to say "No" to, to pull it off?

Questions for Getting "Under the Surface"

- You mentioned a challenge your group is dealing with. Let's slow down a bit. What *else* might be going on here? What aspect might be harder to talk about, but is also there?
- Sounds like [this person] has been challenging. If there were a challenge *underneath* this one dynamic, that might be a bigger pattern or question for us, what would it be?
- We've covered the urgent challenges rising to the surface this week. But I want to make sure to check-in about 'the bigger picture.' In the grand scheme of this campaign, what other things are important for us to spend time on?

Questions for Prioritizing

- Which of these things feels most urgent for us to figure out today?
- Which of these do we need to figure out before we can move on to the next step for our campaign?
- Which item do you feel most stressed about? Excited to dig in around?

Coaching the Campaigning “Windows”

Organizing teams have success timing around the “windows” when their base and potential recruits will have the most energy for campaigning. For example, campaign plans are often set in the summer and early winter, to get ready to invite active support for public actions in the early fall, late winter or the spring, and often to take advantage of openings to set local policies (e.g., when municipal budgets are set, or in advance of local primary elections). These are rules of thumb, not hard-and-fast rules – plenty of successful campaigns have operated on a different rhythm. Campaign coaches play an important role in “cheerleading” campaign teams towards launch, and in helping them plan ambitious action sequences that activate the number of supporters needed to win. For that reason we encourage coaches to set an expectation that they’ll help their teams stay on schedule.

Campaign coaching can be simplified to three unique windows, with a central challenge unique to each.

- **Planning Phase** – Organizing teams struggle the most with launching on-time, to avoid missing their ideal campaign window
- **Launch Phase** – Teams have the most difficulty planning a sequence of at least three public actions, rather than one-at-a-time
- **(If Needed) Pivot Phase** – *Balancing the need to keep momentum while flexibly responding to new conditions*
- **Debrief Phase** – Timing the debrief to follow a period of rest but while the campaign is still “fresh”

Key Ingredients of Issue Campaigns

Like baking a cake, we believe there are a few key ingredients to make a campaign “rise” – ready to launch, and to absorb new active supporters into public actions.

- **An engaged leadership team** – Three to ten volunteer leaders who have drafted the campaign strategy and can convincingly recruit others to participate
- **A campaign theory of change** – Also sometimes called a plan to win, this is a few sentences that describe how the group’s actions will change the actions of a group of targets over a short period of time
- **One to three specific demands for one to three targets** – Nothing suppresses our campaigns as effective as too many demands for too many targets
- **A tactic sequence of at least three public actions** – Planning three actions is the surest way to ensure we build pressure, “bake-in” opportunities to recruit new supporters and develop new leaders, change the public story about our demands and create structure tests to ensure we’re building the people power needed to win

Common Challenges for New Campaign Teams

We've noticed four challenges that most teams new to campaigning have difficulty navigating, and that we encourage coaches to prioritize during coaching sessions.

- **Conducting a rigorous power analysis** – Looking at our target's Pillars of Support and our own Spectrum of Support to come up with an accurate guess about what demands we have leverage to win (i.e., if we activate [these people] to [take this action] we'll get [our target] to agree to [this demand])
- **Selecting demands that hit the "sweet spot"** – They feel urgent to our base and the people we want to recruit, and they can be achieved in the next 6-12 months.
- **Designing a tactic sequence** – The strongest campaign plans sequence multiple actions over a specific time period, rather than planning one-at-a-time.
- **Picking a *posture* that matches our level of support** – Are we "cheering on" our targets to agree to our demands, because it doesn't make sense to challenge them via public pressure? Are we encouraging potential champions to come out in favor of our demands, and then challenge our targets' reelection candidacies?

Campaign Strategy Questions

Assessing Targets

- What does your target care about? What are their motivations? What do they rely on to sustain the status quo?
- What public statements have they made on our issue? What past behavior or actions have been consistent or inconsistent with these statements?
- How are similar campaigns approaching this issue elsewhere? Who are they targeting; what are they demanding, and how successful are they?
- What do their financial records tell you? E.g., donor rolls, tax information, annual reports, etc.
- What private statements or insider knowledge do you know or could you find out?
- How has your target 'felt the heat' from your organizing so far? How do you know? (If helpful, ask about what data they have, i.e. number of people at actions, number of emails/calls the target received about their demand, etc.)

Pillars of Support (Power Analysis)

- Which decision-makers could actually grant your demand(s)?
- Which people or institutions does your target count on to maintain the status quo? Who's support, participation, or endorsement is required? What key action (or inaction) is required by them?
- Who can directly influence them, and what evidence do you have of that?
- What else do they rely on or need, that you could put in jeopardy if you mobilize enough people power?

Spectrum of Support

- Which specific institutions, organizations with a constituency, or influential individuals do you need in order to win? Why are they important?
- Who is already sympathetic to your goals? How do you know? What actions could they take as a next step?
- Who is opposed to your goals? How do you know? What opposition could you ‘expose,’ to draw a contrast between your people/goals and theirs?Tactic Escalation
- What are examples of public actions that have “broken through” with your targets or received the kind of attention you’re looking for?
- What else do we know about public actions that seem effective where you are?
- What actions have you seen in other places that might be ‘remixable’ for your context, to help pressure your target?
- What tactics have we seen that inspire you, that you would be excited to invite supporters to participate in?
- What are three tactics you can imagine sequencing together over 1-3 months, with the goal of demonstrating greater active support at each one over time to our targets, and greater willingness of supporters to take risks to participate?

Theory of Change

- What do you think it will take to win?
- Which specific constituencies, organizations, officials, individual “influencers” with followers do you think will have to publicly endorse your demands in order to win?
- How many people do you think you’ll need to recruit “off the fence” to participate in visible, active support roles for your targets to agree to your demands?
- When might your targets be most vulnerable to our public pressure?
- What might your active supporters have to be willing to do, in order to create enough pressure to move your target?

Critical Path Analysis

- If you think about your campaign as a series of dominoes lined up to fall in your direction, which dominoes would have to fall, in what order, before your targets agrees to your demand?
 - *These might be endorsements by key secondary targets, favorable coverage in the media, public polling data, a certain number of people recruited into active support roles, a certain number of people participating in an in-person mobilization, etc.*

Sample Coaching Session Agenda

We usually don't get much time with our groups. Here's a sample 60'-90' agenda.

5-10 min	Warming Up & Checking-In
5 min	Reviewing Our Agenda & Outcomes for Today
5-10 min	Reviewing Our "Dashboard" – Where we are in this phase of the campaign, and providing any needed updates
30-60 min	Key Questions or Challenges – Key questions to "land" by the end of the meeting
1-30 min	Secondary Topics or Challenges
5-10 min	Next Steps
2-5 min	Closing – We recommend closing with a ritual, evaluation or check-in about "how this is going / what was most helpful about today"

Sample Outcomes (we recommend having fewer than five)

- Get clarity on our theory of change
- Decide which secondary target to focus on
- Pick a second tactic in our three-act tactic sequence

Prepping for Coaching Sessions

To maximize your time together we suggest spending at least twenty minutes preparing for each session. Here are some guiding questions to guide your prep:

Session Prep

Overall Assessment

- One strength the group is demonstrating, that I'd like to make sure they also notice is...
- One thing I think they need is...
- One other wish I have for them is...
- Looking back at what they told me would make this relationship a success, I also want to remember, remind them of, or check-in about...

Campaign Timeline

- A way they are "on time" on the rough campaign timeline as I see it is...
- An opportunity I hope they'll seize, that they would need to make a plan for now is...

Learning Campaigning

- An insight or skill of campaigning I think they're demonstrating is...
- A key element of campaigning or campaign strategy we're heading into, that I'd like them to get more practice unpacking, is...
- An insight I'd like them to come to is...

Session Plan

Coaching Tools – Questions, Observations, Stories, Feedback, Suggestions

Our Session Goals & Agenda

- I think we should focus most of our time on landing these one to three outcomes...
- If there's time, we should also...

Questions, Observations & Stories

- A few questions I could ask to help them reach our goals are...
- A campaign story this moment or this group reminds me of is...
- Another observation that might be helpful to this group is ...