

Participant Handouts



Building Effective Worksite Leadership Systems

UniServ Directors are responsible for supporting the growth and development of strong local affiliates. Strong affiliates have a high ratio of engaged leaders to rank and file members and structures that allow for rapid response, relationship development and collective action. This NEA Center for Organizing training is designed to build participants' skills around leadership identification and development. They will learn how to establish differentiated and innovative structures that can increase member engagement and union presence within and across worksites.

Director

Tom Israel

tisrael@nea.org

Academy Coordinator

Ellen Holmes

eholmes@nea.org

Academy Logistics

Ashley Spencer

aspencer@nea.org



EXERCISE: IDENTIFYING LEADERS

Background:

You are a the Uniserv Director for Walking Path High School, and are trying to restart the school site leadership committee. This committee works closely with the building administration on solving work site problems around schedules, curriculum, and contract maintenance. The committee used to have 10 members, but hasn't been meeting for a while. You would like to recruit some new leaders to the committee.

Instructions:

Read the profiles of the contacts you make and the information they share with you. You have no more than 15 minutes to determine who you think you want to recruit as a leader. Develop consensus in your group about who are the best prospects to recruit. Rate the three best prospects (1 = the best).

1. _____
2. _____
3. _____
4. _____

Who is the worst possible choice to build the union?

Contact 1

Brenda Hammond

3Time at school: 15 years

Issues: After 14 years teaching 12th grade, the principal moved her to 9th grade with no explanation. She is worried she's being pushed out.

I don't know who people look up to. It's not me. Nobody cares how I feel. I just organize the showers and birthday parties.

Sure, I have a list of everyone's numbers. I don't mind sharing it with you.

I'm just waiting for a better opportunity to come along, then I'm leaving. I can't afford to make it look like I'm making trouble.



You should talk to Francis Powers. She's a real leader, although she has some screwy ideas.

Sally Rivera is a real fighter, but sometimes she just fights for herself. Sally is one of the younger teachers. She likes to party a lot. I really respect Paula Harris.



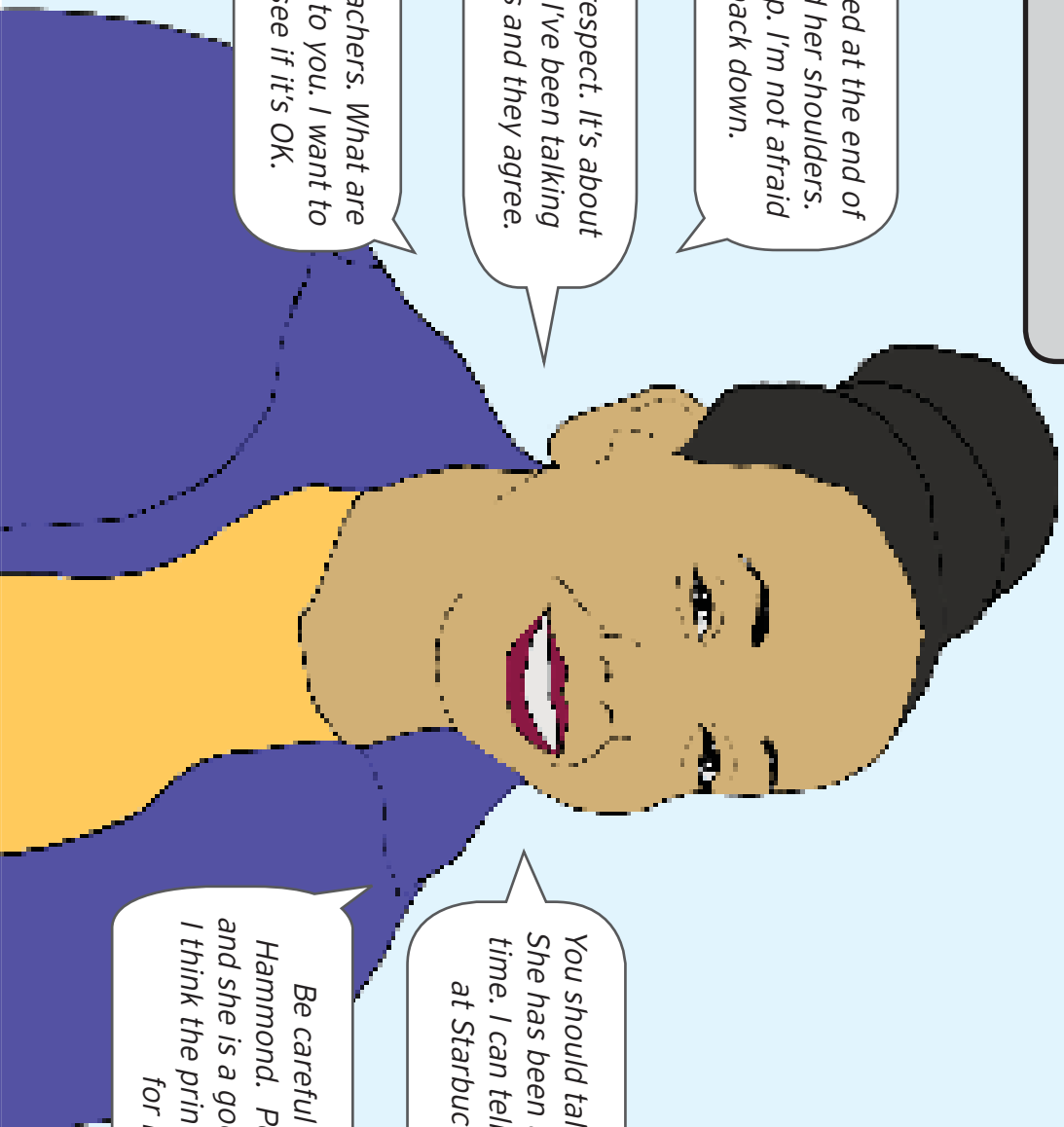
Contact 2
Sally Rivera

Time at school: 4 years
Issues: Not enough prep time and teachers have no voice.

I told the principal I'm exhausted at the end of the day and she just shrugged her shoulders. I'll tell you one thing, I'm fed up. I'm not afraid to speak up and I won't back down.

We need power and we need respect. It's about time someone listened to us. I've been talking to some of the other teachers and they agree.

I mainly talk to the younger teachers. What are their names? Let me get back to you. I want to check with them first and see if it's OK.



You should talk to Evie Winters. She has been around for a long time. I can tell her to meet you at Starbucks after work.

Be careful of Brenda Hammond. People like her and she is a good teacher, but I think the principal has plans for her.



Contact 3
Eve Winters

Time at school: 12 years

Issues: The workload is too high.

They promised me an assistant principal position. I'm not getting involved until I know if I am going to get my promotion.

I'm not saying anything or doing anything until then. If it goes to one of their pets, I'll be mad as hell.

Brenda Hammond is a great teacher, but a little shy. Powers is a great gal. A little nutty, but people follow her.



The younger women seem to stick together. They party a lot and Sally Rivera is their ringleader.

Everyone respects Paula Harris. She was teacher of the year last year. You should see Helen Rockwell. She speaks her mind.



Contact 4 Francis Powers

Time at school: 8 years
Issues: Pace of work

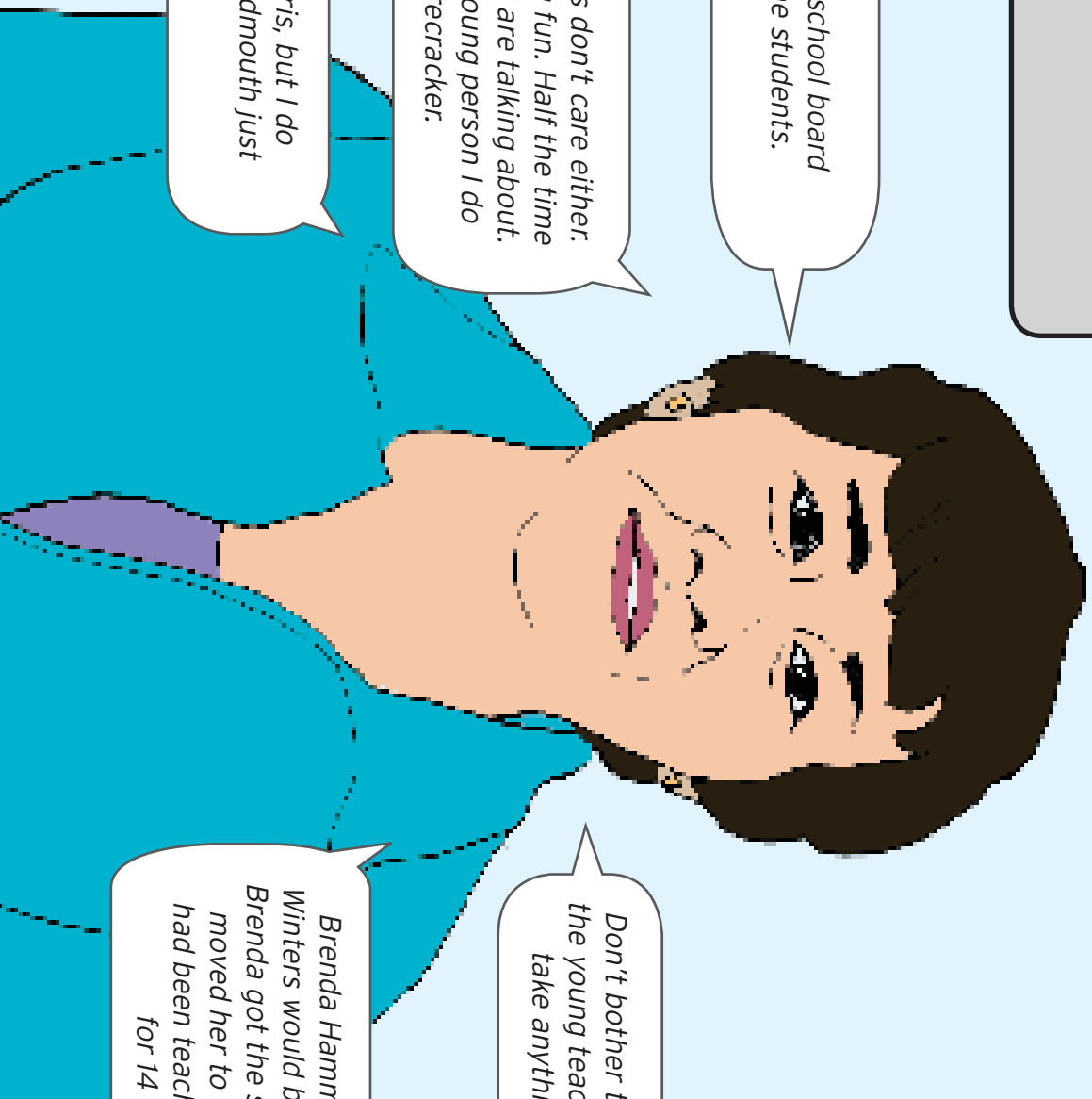
We're just victims here. The school board doesn't care about us or the students.

Some of these younger folks don't care either. They only care about having fun. Half the time I don't even know what they are talking about. Cindy Thomas is the one young person I do like. She is a real firecracker.

I really don't like Paula Harris, but I do respect her. Rockwell is a loudmouth just like Mary Smith.

Don't bother talking to any of the young teachers. They don't take anything seriously.

Brenda Hammond and Evie Winters would be good leaders. Brenda got the shaft when they moved her to 1st grade. She had been teaching 5th grade for 14 years!



Contact 5
Cindy Thomas

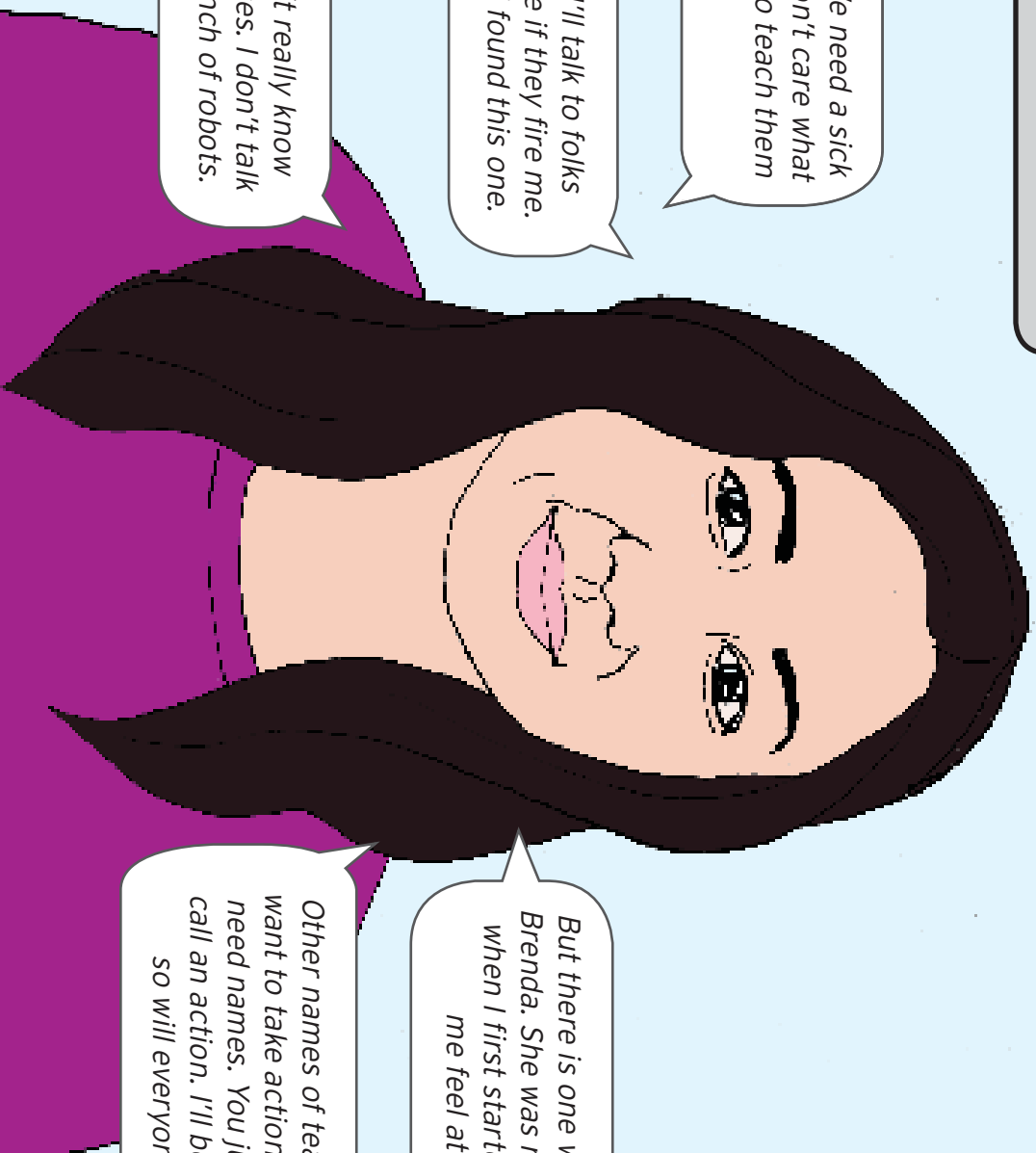
Time at school: 3 months

Issues: Disrespect from the principal.

We need to shake things up. We need a sick out or some sort of action. I don't care what the principal thinks. We need to teach them him a lesson.

Just give me the word and I'll talk to folks about walking out. I don't care if they fire me. I was looking for a job when I found this one.

Who would I talk to? Well, I don't really know their names, I just know their faces. I don't talk to them much. They are all a bunch of robots.



But there is one woman named Brenda. She was real nice to me when I first started. She made me feel at home.

Other names of teachers who want to take action? You don't need names. You just need to call an action. I'll be there and so will everyone else.



neaToday Seattle Educators Score Major Victory for Students

BY CINDY LONG



When members of the [Seattle Education Association \(SEA\)](#) ratified a new contract with the school district on September 20 ending a six-day strike, it was a victory not only for educators, but also a major win for students, public schools, and the communities they serve. The contract — approved by 83 percent of teachers, 87 percent of paraprofessionals and 96 percent of office professionals — gives educators a raise, but also guarantees more recess time for elementary students, an educator voice in the standardized testing regime, and new policies to ensure equity at the city's public schools.

"This is a hard-fought victory for the kids of Seattle, and I am proud of SEA members and our incredible bargaining team," said Jonathan Knapp, SEA president. "This agreement signals a new era in bargaining in public education. We've negotiated a pro-student, pro-parent, pro-educator agreement. We really appreciate the strong support from parents and students."

When the union, representing 5,000 educators in the Seattle district, voted to go on strike, parents scrambled to find daycare, but they also demonstrated support for their children's educators by writing op-eds, [signing a Change.org petition](#), rallying in front of the school district's administrative offices, or by joining the educators picketing at their children's schools.

Elizabeth Gay, her 10 year old daughter, and 13 year old son, showed up at their elementary school every morning to march with their teachers.

"We wanted them to know we appreciated them, supported them, and recognized that they were asking for things that enhanced our children's lives — not just their own," she said. "Learning does not only happen in a classroom and our teachers showed my children that it is critical to organize and stand up for what is important."

The family made signs, brought coffee (very important in Seattle), and created an online sign-up so that there were always at least ten families joining the educators to help keep their energy up as they clocked in ten to fifteen miles of marching each day.

"We fully supported our educators and their contract demands, even though it wasn't convenient for our family to have school start later due to the strike," Gay said. "But our personal convenience was not as important as the things our teachers wanted. We agreed that it was important for kids to have more recess, reasonable testing, equitable discipline, professionals who don't have impossible case loads, and teachers who are paid well. It's unacceptable to me that we lose great Seattle teachers to districts north of here because they pay better and their cost of living is lower."

Naomi Wilson, who has a first-grader and fourth-grader in the district, picketed in front of her children's school. She told The Huffington Post that educators deserved a raise after going without for six years in one of the country's most expensive cities, but "things like recess and reasonable testing and workloads and special education and equity — that's them fighting for you," she said. "Those are the issues we raised. So we come out strong and support [educators'] ability to bargain and fight not just for us, but for the education system. These are our kids. These are my kids."

Members of SEA were also supported by the [Seattle City Council](#), which voted unanimously to designate the week educators went on strike as “[Seattle Educators Week](#)” and to ask the district to continue negotiating in good faith with the union to bring the strike to an end. They also directed the city-run community centers to open their doors to care for elementary-age students at no additional costs to parents.

“A victory for the union is also a victory for education across the country. It shows that if we organize and remain united, we can resist attacks on public education,” said Councilwoman Kshama Sawant.

Often when educators strike, the public perception is that it’s all about money. But SEA members showed their dedication to students with a list of goals that included a guaranteed daily recess of 30 minutes for elementary school children. At some schools, kids were getting as few as 15 minutes for lunch and recess, forcing a choice between food and play.

They also demanded that the district create committees at 30 schools to examine issues of race and equity, including disciplinary measures that disproportionately affect minorities. Studies have shown that [black students are far more likely to face harsh disciplinary measures like suspensions](#) and expulsions. After the end of the strike, the Seattle School Board voted for a one-year ban on out-of-school suspensions of elementary students who commit specific nonviolent offenses, and called for a plan that could eliminate all elementary school suspensions.

SEA also won an end to the use of student standardized test scores to evaluate teachers, and educators will now be included in decisions on the amount of standardized testing required of students.

Special education teachers will have fewer students to work with at a time. In addition, there will be caseload limits for other specialists, including psychologists and occupational therapists.

“These issues are about our kids,” said Phyllis Campano, SEA vice president and chair of the SEA Bargaining Team. “It’s about giving our children what they need.”

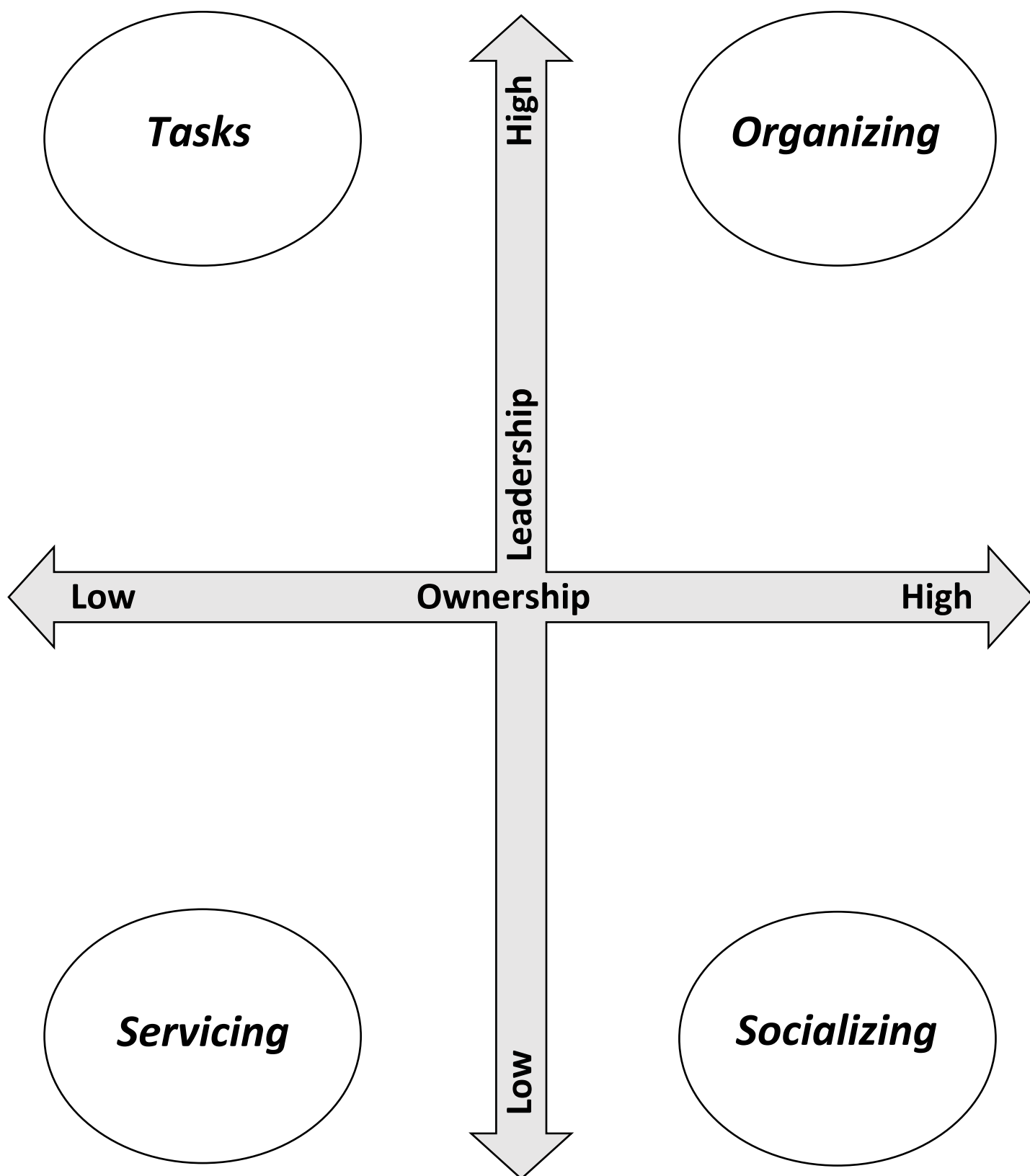
Negotiations on the agreement that centers on student success had been ongoing since May; this was the first contract-related strike of Seattle educators since 1985.

“There is no stronger voice or advocate for Seattle students than Seattle educators,” said NEA President Lily Eskelsen García. “They worked diligently for an agreement with the Seattle School Board that centers on student success, addressing issues such as ensuring opportunity for every student, regardless of ZIP code; providing the one-on-one attention that students need; and creating more time for students to learn with less focus on harmful standardized tests. As educators, student success is at the center of everything we do, and I’m proud that Seattle educators are standing up for the schools students deserve.”

<http://neatoday.org/2015/09/29/seattle-educators-score-major-victory-for-students/>

Engagement Grid

John Donaghy, Executive Director, Seattle Education Association



Gather PAC Donations

Design Professional Development for Colleagues

Representative Assembly

Member Leads Grievance Process for Another Member

Hold a Ten Minute Meeting

Attend Staff Led Bargaining Training

Attend an Early Career Education Networking Event

Attend NEA Led Events

Provide Testimony to Board of Education or Legislature

Find five People Who Want to Plan an Action and Coordinate that Plan

Participate in a Phone Bank

Determine What the Script for a Phone Bank Should Be

Working with Members to Craft Bargaining Language

Lead a Team to Participate in a Phone Bank

Recruiting and Coaching Potential Leaders

Planning and Leading a Community Forum

Recruit Other Members to Design a Professional Development for Colleagues

Plan and find Other Members to Deliver Important 10 Minute Meeting Updates

Participate in a Survey

Design a Survey

Identify a Team who will Design, Distribute, Collect and Analyze a Survey

Read an Important Bulletin

Distribute and Important Bulletin

Find a Team to Design, Distribute and Follow up About an Important Bulletin

Find and Invite Early Career Educators to a Networking Event

Identify a Team of Early Career Educators to Determine What they Need

Donate to PAC

Coordinate a Team to Determine Goals and implement a Plan for PAC Donations

Attend a Rally

Endorse Candidates

Find a Team who Sets Candidate Endorsement Criteria and Plans the Process

Participate in a One on One

Develop a plan for doing one on ones across a worksite

Leading a team doing one on ones, debriefing them and identifying issues

One on One Observations

What is the member's "agenda" or "why" ?

What is the organizer's "agenda" or "why" ?

When did it become clear to you if this person would be a leader or not aligned with the agenda presented by the organizer?

Did the organizer get a commitment?

What were some good questions that the organizer used?

Building Relationships

Key Concepts

- The **1:1 meeting** is a key tool for establishing and maintaining relationships; there are three types of 1:1s – recruitment, maintenance, and escalation.
- A **“hard ask”** is an effective way to ask for a commitment to establish a relationship.
- **Recruitment and retention best practices** can significantly increase the rate at which new people join and stay on your team.

Why Build Relationships?

Again, we define organizing as leadership that enables people to turn the resources they have into the power they need to make the change they want. Power comes from our **commitment** to work together to achieve common purpose, and commitment is developed through relationships.

“Organizing is a fancy word for relationship-building.”

– Mary Beth Rogers

Building Intentional Relationships

Relationships are rooted in shared values. We can identify values that we share by learning each other’s stories, especially “choice points” in our life journeys. The key is asking each other “why?”

Relationships are long term. Organizing relationships are not simply transactional. We’re not simply looking for someone to meet our ask at the end of a 1:1 meeting (read on for what this means) or house meeting. We’re looking for people to join with us in sustained, long-term growth and action.

Relationships are created by mutual commitment. An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time. Because we can all grow and change, the purposes that led us to form the relationship may change as well, offering possibilities for deeper relationships or more enriched exchange. The relationship itself becomes a valued resource.

Relationships involve consistent attention and work. When nurtured over time, relationships sustain motivation and inspiration and become an important source of continual learning and development for the individuals and communities that make up your organizing campaigns.

The 1:1 Meeting

The 1:1 meeting is a tool to establish, maintain, and grow relationships in organizing. Each 1:1 meeting has four key pieces:

Purpose – Be up front in establishing why you are meeting in order to make sure you are both on the same page. If you plan to ask the person you're meeting with to make a commitment at the end of your 1:1, it is appropriate to let them know when you set up the meeting and remind them at the beginning of your meeting, so that they aren't caught off guard.

Exploration – Most of the 1:1 is devoted to exploration by asking probing questions. If you are meeting a person for the first time, ask questions that help you understand their story, values, and resources that may be relevant to your shared purpose (e.g. knowledge or skills they may have). If you already have a relationship, ask questions that help you understand what's going on in their life, or the challenges or success they are experiencing in their organizing.

Exchange – We exchange resources in the meeting such as information, support, and insight; you may connect your stories or provide coaching on a challenge. This creates the foundation for future exchanges.

Commitment – A successful 1:1 meeting ends with a commitment to start working together or continue working together.

Three Types of 1:1 Meetings

There are three types of 1:1s that you will use or engage in in your organizing relationships.

1. Recruitment 1:1

These meetings happen at the start of a relationship to connect you and a new organizer and establish a connection based on shared goals and values. The goals of the recruitment 1:1 are to make a personal connection, use your personal story to identify and gauge potential and interests, probe for a shared experience and connect on values, and lastly, pivot to engagement – that is, move the volunteer to action based on what you've discussed. Think about the volunteer's aptitude, skills, and connections when considering how to best engage them.

See page 18 later in this section for a sample recruitment 1:1 meeting agenda.

2. Maintenance 1:1

These meetings should occur regularly between you and each of your organizers (assuming that you are in a leadership role in your team or snowflake). This is an opportunity to catch up on a personal level, debrief recent actions taken by the organizer and their team, and offer coaching. Maintenance 1:1s should be scheduled regularly and proactively: do not wait for a problem to occur to schedule one. A good guideline is to schedule a maintenance 1:1 every two weeks.

3. Escalation 1:1

These meetings are for organizers who are ready to take the next step on the "ladder of engagement" in assuming more responsibility and taking on ownership of goals (see the Structuring Teams section for more information on the "ladder of engagement"). First, recognize the accomplishments the organizer has already made, then propose the idea of taking on this new leadership role. If all goes as planned and the organizer accepts, take the time to clearly lay out the responsibilities and expectations for this new role.

Because every organizer has a limited amount of time, and maintenance 1:1s need to happen regularly, each organizer has a limit to how many relationships they can maintain. See the Structuring Teams section for information on "sustainable relationship ratios."

Maintenance 1:1s are the primary opportunity to coach an organizer. See the Coaching section for more information on how to approach coaching.

Hard Asks

When you ask someone to make a commitment – for instance, attend an event or take on a new role – it's important to make an effective ask, or what we call a "hard ask." A hard ask is an ask that results in a commitment to a specific action. Here are some best practices for a hard ask:

- Ask in **concise, plain, and specific language**.
 - » Example of an effective hard ask:
"Can you come to our team meeting next Wednesday at 6pm at Alisha's house?"
 - » Example of an ineffective ask:
"Would you be interested in coming to a meeting at some point to meet the team and talk about how you might want to get involved?"
- Never apologize for asking: organizing is an opportunity, not a favour. Sometimes we feel badly for asking someone to take action because we feel it is an inconvenience, when really, we're providing the person we're asking with an **opportunity** to take action.
- Don't ask them to commit to something general; instead, **have a specific event or role in mind**. If it's an event (e.g. a canvassing event or house meeting), include the date, time, and location in your ask.
- **Convey urgency**: Describe an urgent problem and how the person you are asking is the solution to the problem.

Three Types of No

When securing commitment, it's inevitable that our hard asks will sometimes be met with "no." In organizing, there are **three types of "nos"** that you will encounter – "**not now**," "**not that**," and "**not ever**" – and being attuned to the difference will dictate how you proceed with the person you're asking.

If someone says "no" they might mean "not that time," so try offering another time or date. For example:

"Can you come to our next team meeting on Monday at 5PM?"

"No, I have to work then."

"No problem, we have another meeting next Sunday at 1PM, can you come to that?"

If someone says "No, I don't want to do that," it probably means "not that." Try asking them to commit to something else. For example:

"Can you come door-to-door canvassing with us on Tuesday at 5PM?"

"I don't know if I feel comfortable going door-to-door, I've tried it before and found it really intimidating."

"That's okay! We are also planning an event to recruit new volunteers for the end of the month. Will you come to the planning meeting for that on Sunday at 1PM?"

If someone says definitively “No, I’m not interested in doing more” or “No, I don’t want to join the team,” then don’t worry about it! Thank them and move on. For example:

“Can you come door-to-door canvassing with us on Tuesday at 5pm?”

“No, I am too busy right now to take on anything else, I’m sorry!”

“That’s okay, thanks for taking some time to talk with me. Have a great day!”

Sample Recruitment 1:1 Agenda

The following is a sample recruitment 1:1 meeting agenda. Reminder here that this is a framework you can follow, not an exact formula for what you must do in a 1:1.

Purpose (2 minutes) – Be up front about your purpose for the meeting (e.g. “Our team needs a new canvass lead.”), but that first, you’d like to take a few moments to get acquainted.

Exploration, Connection, and Exchange (20 minutes) – Most of the 1:1 is devoted to exploration by asking probing questions to learn about the other person’s values and interests, as well as resources they might hold. In response, it’s up to you to share enough about your own values, interests, and resources so that it can be a reciprocal exchange. Start by asking questions like:

“Why is this issue important enough for you to act?”

“Can you remember the first time you stood up for something you believed in?”

“Did you always feel strongly about this issue? Why / why not and what changed that?”

Once you have an understanding of their story and motivations, share yours. Wherever you find similarities between their story and yours, make a connection.

Commitment: A Hard Ask (10 minutes) – A successful 1:1 meeting ends with a commitment to work together. This commitment is best secured through a hard ask:

- Stress the urgency of the commitment you are asking for:
“We need another canvass lead to enable our team to meet our target.”
- Emphasize the values you have in common:
“To achieve the change we want we need to meet our targets.”
- Frame it so that it seems the person you’re asking is the solution to the problem:
“Will you take on the role of canvass lead?”
- Be specific, make sure they understand what it is you are asking them. Provide time and space for them to ask questions until they’re clear.
- End the meeting with an understanding of next steps – that is, they should leave knowing the next time you will meet or how and when they will hear from you.

In this portion of the 1:1, you are trying to get them to share their Story of Self with you, and then to share your story to build a Story of Us. See the Telling Stories section for what this means.

Best Practices for a 1:1

Do	Don't
Schedule a time to have this conversation (usually 30-60 minutes)	Be unclear about purpose and length of conversation
Plan to listen and ask questions	Try to persuade rather than listen and ask questions
Have a plan for your meeting – give context or purpose, connect with one another, and secure commitment	Chit chat about your interests
Share experiences and motivations	Skip stories to 'get to the point'
Illustrate a vision that articulates a shared set of interests for change	Miss the opportunity to share ideas about how things can change
Be clear about your next steps together	End the conversation without a clear plan for next steps
Split the bill if you meet in a coffee shop or restaurant	Pay for the whole bill (note: it can make the relationship feel transactional and can get expensive in the long run!)
Meet in public unless you know them well (e.g. a coffee shop or public park)	

Recruitment & Retention Best Practices

Employing best practices can significantly increase the rate at which new people join and stay on your team. Here are some key best practices to keep in mind when building and maintaining relationships:

- Don't be apologetic: organizing is an opportunity, not a favour. When asking for commitment, be enthusiastic.
- Always Follow-Up: When someone offers to get more involved, ask for their contact information and give them yours. Follow up with them as soon as possible, ideally within 48 hours.
- Always schedule for the next time: don't let anyone leave without asking when they'll be coming back.
- Confirm commitment: use a hard ask and make sure your people understand that you are counting on them.
- Plan for no-shows: assume that half of your people will turn up. For example, if you need four people for a successful event, plan on scheduling eight.
- Design actions that are empowering to participate in.

Designing actions so that they are inherently motivational is a key way to keep people engaged. See the Acting: Targets & Timelines section for information on "motivational engagement."

In organizing, it's up to us to create welcoming, organized spaces and engage volunteers so that they keep coming back. The following is a list of top reasons why volunteers don't return:

- They don't feel it is worth their time
- Atmosphere is disorganized and they don't feel they're receiving attention or direction
- No one explained why the work they are doing is important
- They are uncomfortable doing what they have been asked to do
- They feel overwhelmed by tasks and goals
- The volunteer environment is unwelcoming
- No one recognizes their contribution
- No one asked them

To summarize, building strong, resilient relationships is critical for effective community organizing. Our power stems from our commitment to one another and to taking action together, and the hard ask, the 1:1 meeting, and best practices for recruitment and retention are key ways we can secure commitment in our work.

Leaders and Structures that Have Achieved Change

You were assigned an article to read and know well. You will use that article for this discussion activity.

Title of your article: _____

During Round 1 – you will be meeting with the others who were assigned this same article – your goal in the time allotted is to have thoughtful conversations and answers to the following three questions.

What were the ways that leaders were identified and grown?

What were the structures were developed, expanded and tested?

What do you think was the role of the staff in these examples?

During Round 2: You will be reorganized into quads – with one person from each assigned reading as part of the group. You will use this time to share across the articles. Your task during this round is to develop answers for the following three debrief questions.

What was similar across all the examples?

What was something surprising or new to you?

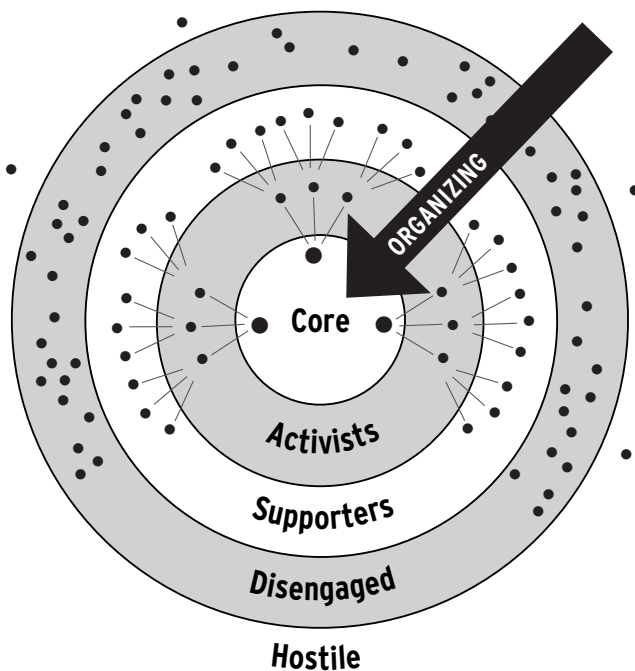
What are you still left wondering and want to talk about?



ORGANIZED PEOPLE HAVE POWER

- A. The other side of this page shows how the boss structures the workplace. Managers and supervisors are organized in a hierarchy, and this helps them wield power over a disorganized workforce.
- B. Steps 1, 2, and 3 show what you can do about it. A workplace organizer seeks out leaders who have their co-workers' respect, and recruits these leaders to form a committee that knits the whole workforce together.
- C. Fold along the dotted line to see the result. Together, organized workers have power—enough to challenge the organized power of management.

AIM FOR THE BULLSEYE



Another way to visualize your progress is to picture your co-workers distributed on a dartboard. In the center is the **core group**, people who are always thinking about how to get others involved.

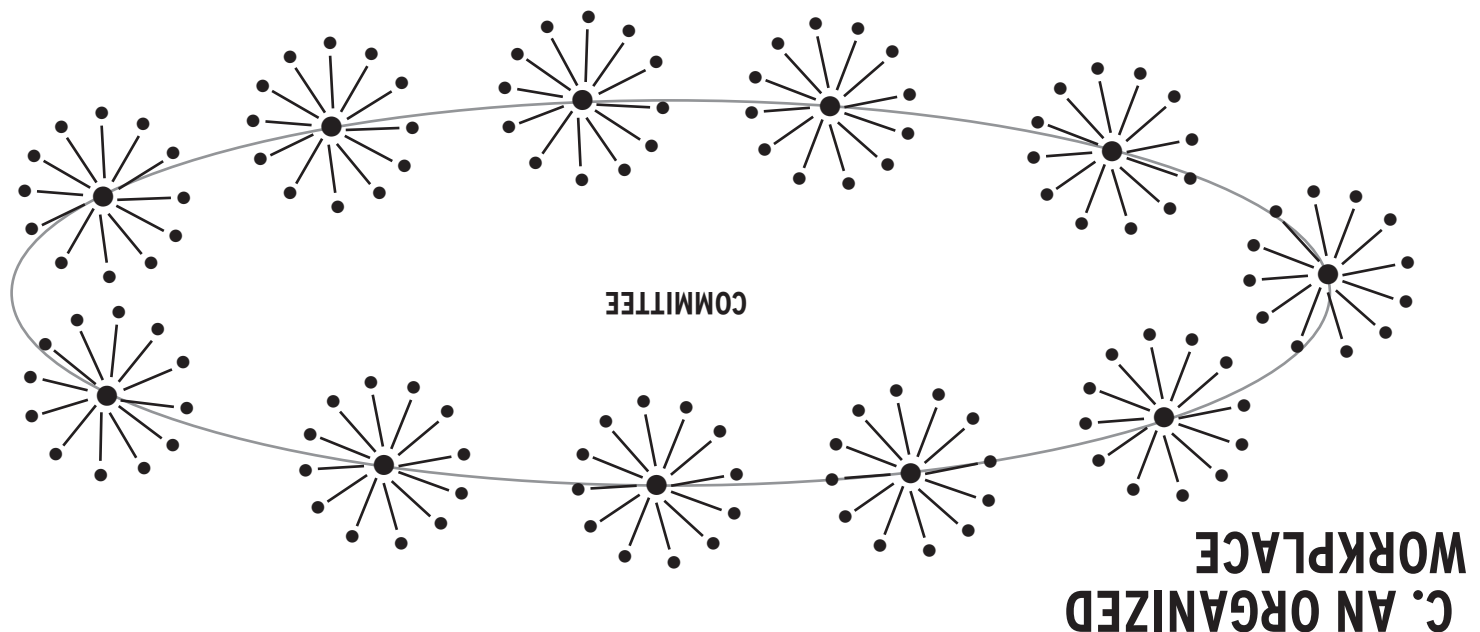
In the first ring are **activists**. When an issue heats up they will take responsibility to get the word out and ask other people to take action, too.

In the next ring are **supporters**, who will wear a button or sign a petition. The **disengaged** don't participate at all.

Once you get enough leaders working together in the core and activist circles, your network can reach everyone. As an organizer, you're always looking for ways to move people closer to the center, one step at a time.

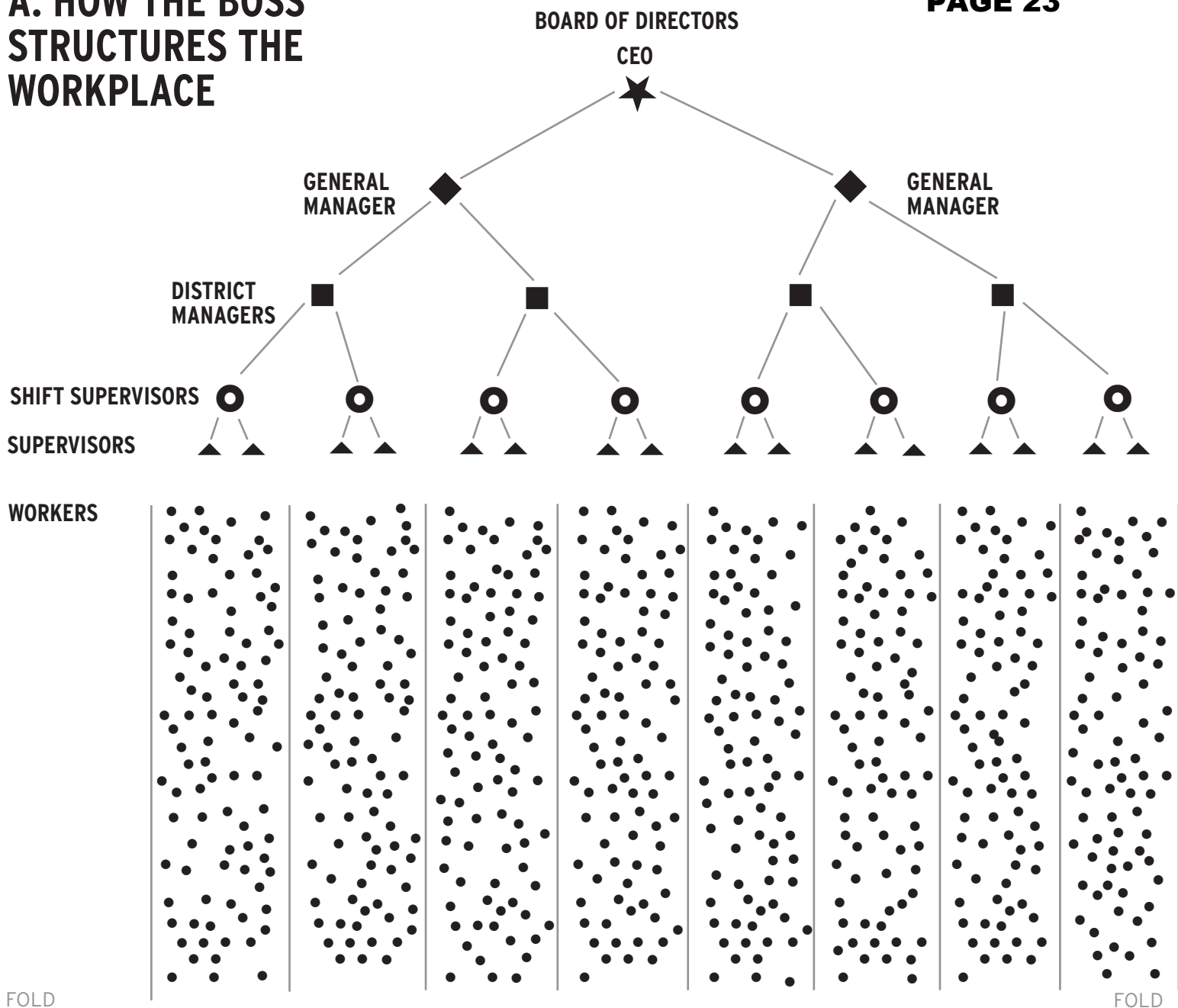
FOLD

FOLD



A. HOW THE BOSS STRUCTURES THE WORKPLACE

PAGE 23



B. HOW WE ORGANIZE OURSELVES

Adapted from Cathy De La Aguilera



COACHING 101

“How do I enable others to find purpose in the face of challenge?”



ACKNOWLEDGEMENTS

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below.

The coaching framework is from the work of Ruth Wageman and Richard Hackman, and the full framework can be found in Wageman, 2010 "Toward a framework for coaching" Working Paper, Harvard University, and in Hackman and Wageman, (2005). "Toward a theory of team coaching," Academy of Management Review, 30, 269-287. Adapted here by Hope Wood, New Organizing Institute.

RESTRICTIONS OF USE

The following work [this workshop guide] is provided to you pursuant to the following terms and conditions. Your acceptance of the work constitutes your acceptance of these terms:

- You may reproduce and distribute the work to others for free, but you may not sell the work to others.
- You may not remove the legends from the work that provide attribution as to source.
- You may modify the work, provided that the attribution legends remain on the work, and provided further that you send any significant modifications or updates to hope@neworganizing.com.
- You hereby grant an irrevocable, royalty-free license to Ruth Wageman and New Organizing Institute, and their successors, heirs, licensees and assigns, to reproduce, distribute and modify the work as modified by you.
- You shall include a copy of these restrictions with all copies of the work that you distribute and you shall inform everyone to whom you distribute the work that they are subject to the restrictions and obligations set forth herein.

COACHING: FROM EXTERNAL CONTROL TO GROWTH

OBJECTIVES:

By the end of this training, you will...

- Learn a simple diagnostic framework and a 5-step process for coaching others in organizing efforts
- Practice the coaching process through role-plays and reflective discussion
- Learn to build a culture of coaching into your team

Why is coaching an important organizing practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching, put simply, is the act of enabling 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. Some examples of when coaching skills are necessary:

- Preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.
- Facilitating the goal setting of a leadership team struggling with common understanding of the goals
- Debriefing with a leader who has not kept a commitment
- Helping a leader overcome motivational challenges with managing volunteer teams in the field
- 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.

Effective Coaching Is	Effective 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 coachee before you even hear or observe their challenges
- Helping the coachee explore and make sense of their challenges and successes and what they learned from it all	- False praising of the coachee or only focusing on their strengths because you do not want to hurt their feelings
- Helping the coachee to find solutions to challenges	- Solely criticizing the coachee for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coachee what to do

How do I practice coaching in organizing?

Good coaching requires learning how to identify a person's or team's strengths and weaknesses in order to find ways to help them mobilize their strengths to overcome their weaknesses. People often know what they "should" do, but a fresh set of eyes is helpful in diagnosing the specific challenges they're facing and initiating a brainstorm of solutions to maneuver through them. There are three basic practices of coaching:

Basic Practices of Coaching:

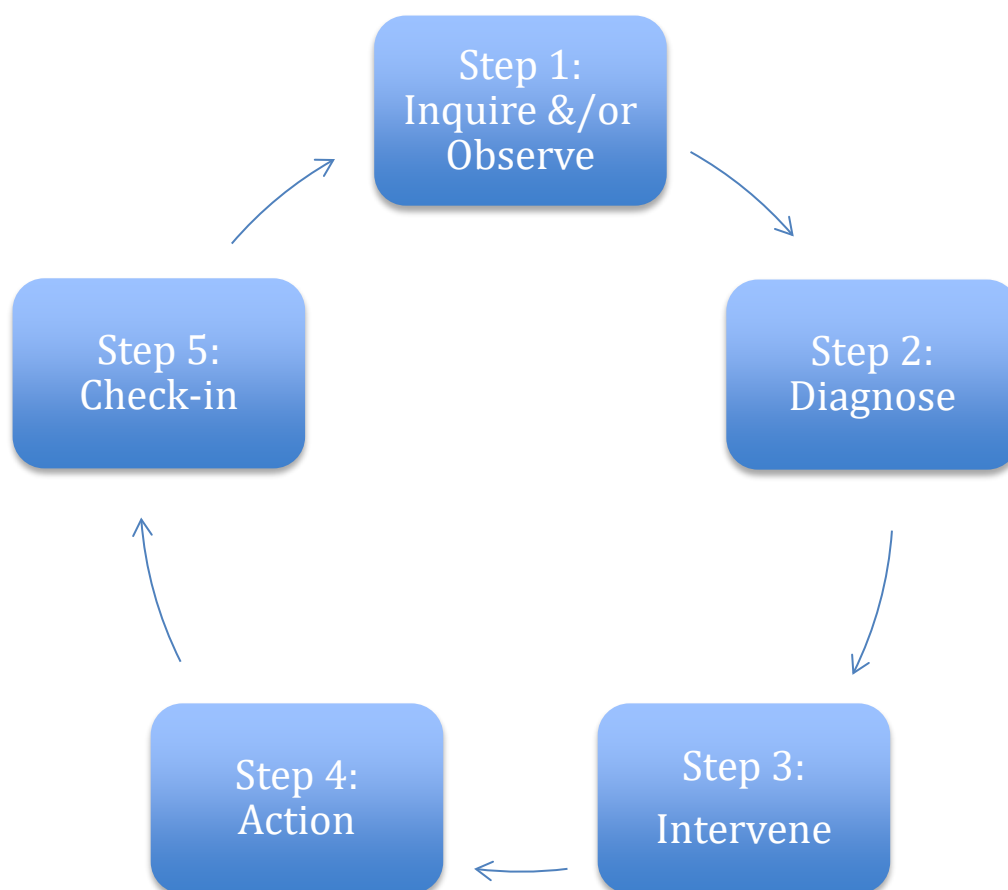
- **Motivational (heart) coaching** is aimed at enhancing *effort*.
- **Strategic (head) coaching** is aimed at helping the team or individual plan, evaluate, or think about its *strategic or structural approach*.
- **Skills-based (hands) coaching** is aimed at helping the team or individual *execute with skill* (and learn from execution).

The first part of effective coaching is diagnosing which coaching practice is most needed in any given moment. For example, if an organizer is struggling with strategy but you try using motivational coaching, it is likely to frustrate them further.

As is true for the other practices of leadership, coaching is a practice that only gets honed by DOING, and then reflecting on what works and what doesn't.

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 coachee 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?

4. Action: How can I allow the coachee 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 coachee to try the intervention.
- Observe them in action and note observations for your debrief.

5. Check-in and Debrief: What do I ask the coachee 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 coachee in integrating this new or revised solution into their regular practice.
- Find out from the coachee how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

WORKSHEET:

REFLECT ON COACHING

How does this way of COACHING compare with other types of COACHING you have experienced?

What is most challenging and most new or interesting about this way of supporting others' development?

How could this type of coaching be used to help you support other organizers (volunteer and staff) out in the field? What are some of the practices that you will use next time you work with another organizer?

Coaching Cycle Scenarios – For Use with Coaching 101 Package

Below are 4 scenarios, you have been provided enough information for **Step 1: Inquire and/or Observe - What do I see and hear?** of the coaching cycle – and you are free to use a little imagination to round out the scenario. Your task is to determine what kind of coaching they need – **Motivational, Strategic, Skills-based.**

Scenario 1: The context – You are preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.

This is a group of local leaders that have secured member volunteers to run a phone bank asking for campaign contributions for a school board candidate's campaign. The leaders are scared of hearing no's from their colleagues on the phones and are a little by the growing "clarifying questions" coming from their volunteers. Ultimately, they feel they should just scrap the whole thing because they are not confident that the volunteers will show up and they are sure they won't raise much money.

Type of Coaching: _____

Scenario 2: The context – You are facilitating the goal setting of a leadership team struggling with common understanding of what their campaign should be able to achieve.

The team members have a wildly divergent notions of what the outcomes should be and they keep shying away from setting a goal and straying into thinking about "cool" actions they could plan. It appears to you that they may not have run this kind of meeting before and they may not understand how to develop a plan for action.

Type of Coaching: _____

Scenario 3: The context – You are debriefing with a leader who has not kept a commitment.

The leader is relatively new and quite a bit younger than others at the worksite – but has good relationships and is well respected. The commitment was a relatively small one that was dependent on using already established relationships – a.k.a. "ask five friends to..." You get the sense that this leader has not taken this commitment seriously at all.

Type of Coaching: _____

Scenario 4: The context - Helping a leader overcome motivational challenges with managing other members across several worksites who are supposed to be making a face to face contact with each employee in the worksite to update contact information and establish a basic presence in each worksite.

The leader is having difficulty keeping the teams to following the protocol of relationship building – various teams are reverting to – "place a notice in the mailbox" – send a broadcast email – or are leaving it to one person at the worksite to do alone – or are not doing it at all. The leader has been shy to redirect the teams to the protocol of face to face contact and feels that it is "not their place" to question if other adults have kept up their end of the work.

Type of Coaching: _____

The Consultancy Coaching Protocol

15 mins	What	How
	Opening by Lead Facilitator	<i>Facilitator reviews protocol and adjusts time as desired by presenter or as fits the group. The group may decide to spend more time on the preparation section, or in the discussion. Timing also depends on how many are in the group.</i>
5	Presenter Shares	1. <i>Presenter shares the dilemma—this can be verbally shared or presenter can offer a written document. If a written description is shared, presenter can also verbally add anything he'd like before or after the group reads the document. It's appropriate for the group members to take notes about what they're hearing. Presenter might also share an artifact such as a transcript of a coaching conversation, an email, a plan for a conversation, etc.</i> 2. <i>Presenter can ask for feedback or input in one area or around one key question. Asking for specific feedback or support can help a discussion stay focused and useful.</i>
3	Clarifying Questions NOT Probing	<i>Group asks presenter clarifying questions. Clarifying questions are yes/no or require very short answers.</i> <i>The facilitator needs to interrupt if probing questions are asked and can remind the group that probing questions can be raised during the discussion.</i>
5	Group Fishbowl Discussion	1. <i>Presenter moves his/her chair outside of the circle and can take notes if desired.</i> 2. <i>The presenter can remind the group of the presenter's key question.</i> 3. <i>Group members can raise probing questions, share the insights they gained, and share any other comments or reflections they came up with. The facilitator can open this section by suggesting that each group member briefly (in about one minute) share his/her initial thoughts on the dilemma and the group can whip around so that all can share a thought before opening into a less structured discussion.</i> 4. <i>Group needs to ensure that discussion stays focused on the presenter's dilemma and if requested, on his/her key question. Group may also take actions to ensure equity of participation.</i>
2	Closing	<i>Presenter shares any reactions, insights, feelings about protocol or what was said; he/she doesn't need to respond to questions that were raised in the group discussion. If time permits, group can share reflections on process.</i>

General Coaching Sentence Stems

Active Listening Stems	Nonjudgmental Responses
• So... • In other words... • What I'm hearing, then... Is that correct? • What I hear you saying is... Am I missing anything? • I'm hearing many things... • As I listen to you, I'm hearing... Is there anything else you feel I should know?	• I noticed how when you...the students really... (to identify something that worked and why it worked) • I'm interested in learning (or hearing) more about... • I'd love to hear more about... • Thank you for sharing your thoughts. Can you tell me more about...?
Clarifying Stems	Probing Stems
• Let me see if I understand... • I'd be interested in hearing more about... • It would help me understand if you'd give me an example of... • So, are you saying/suggesting...? • Tell me what you mean when you... • Tell me how that idea is like (or different from)... • To what extent is...? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...	• What's another way you might...? • What would it look like if...? • What do you think would happen if...? • How was...different from (or similar to)...? • What's another way you might...? • What sort of an impact do you think...? • What criteria do you use to...? • When have you done something like...before? • What do you think...? • How did you decide...(come to that conclusion?)? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...



Facilitative & Directive Coaching Stems*

FACILITATIVE	DIRECTIVE
Cathartic Stems - I'm noticing that you're experiencing some feelings. Would it be OK to explore those for a few minutes? - What's coming up for you right now? Would you like to talk about your feelings? - Wow. I imagine I'd have some emotions if that happened to me. Are you experiencing strong feelings?	Informative Stems - There's a useful book on that topic by... - An effective strategy to teach ____ is... - You can contact ____ in ____ department for that resource... - Your principal will be in touch about that. _____ is very effective at teaching that skill; maybe you could observe him.
Catalytic Stems - Tell me about a previous time when you... How did you deal with that? - I hear you're really struggling with... How do you intend to start? - It sounds like you're unsatisfied with... What would you do differently next time? - You've just talked about five different things you want to work on this week. The last thing you mentioned is... How important is this to you? - How do you want your students (or a particular student) to remember you? - How do you want to remember this time or situation in fifteen years? - Who do you want to be in this situation?	Prescriptive Stems - I would like you to discuss this issue with your supervisor. - You need to know that the school's policy is... - Have you talked to ____ about that yet? Last week you said you planned on doing so. - Would it be ok if I share some advice that I think might help you? You're welcome to take it or leave it, of course. - I'd like to suggest...
Supportive Stems - I noticed how when you...the students really... (To identify something that worked and why it worked) - It sounds like you have a number of ideas to try out! It'll be exciting to see which works best for you! - What did you do to make the lesson so successful? - I'm interested in learning (or hearing) more about... - Your commitment is really inspiring to me. - It sounds like you handled that in a very confident way. - You did a great job when you... - I'm confident that you'll be successful.	Confrontational (Interrupting) Stems - Would you be willing to explore your reasoning (or assumptions) about this? - I'd like to ask you about... Is that okay? - What's another way you might...? - What would it look like if...? Is there any other way to see this situation? - What do you think would happen if...? - What sort of an effect do you think...would have? - I'm noticing (some aspect of your behavior)...What do you think is going on? - What criteria do you use to...? - Who do you want to be in this situation? How do you want to show up? - How do you want others to see you in this situation?

* The labels for these categories—cathartic, catalytic, supportive, informative, directive, confrontational—are from the work of John Heron.



Campaign Design Opportunity 1- Eagle Nest Elementary

This is a Title 1 school with a high English Language Learner population. Because of concerns about low reading and math scores, students have very limited recess and almost no non-academic curriculum. There are 43 certified members with a 100% membership. This school is a low performing school and many types of school reform have been pushed into this school. Turnover of all staff is high. The certified building rep struggles to get people to come to meetings as they say they don't want the principal to retaliate against them for attending. The building rep attends every RA but does little on her own to solve small contract issues, relying on calling UniServ. She has been the building rep for at least 20 years and says she can't get anyone else to do the role.

There are a large number of new teachers – 14 in their first and second years of teaching. They each have mentor teachers and will need to complete three successful years at standard on the district's evaluation system before they can transfer. Many of them are not from the area and are not familiar with the culture of the students they serve. They struggle themselves to find affordable housing within Enchanted County. Teachers feel pressured to work through their lunch by the Title 1 Literacy Coach – especially new teachers. Due to the bullying, command and control nature of the administrator, teachers are not included in decision making and the leadership team reports that they are splintered between the two literacy coaches who are "principal favorites" and more senior teachers.

There is a large group – 18 - education support professionals (ESP) who work in the school. They are equally dissatisfied with the working conditions and they are just as fearful of the principal. They don't have any member willing to be the building rep and most don't know their contract rights. If there are any contract violations, either people are unaware of their rights or they are too timid to file the grievances. While the ESP group has 100% membership, they are not connected with each other well.

This school has a very strong Parent Teacher Organization and the school is used for a number of after-school and community programs. Two of the parents are connected with a community group focused on ensuring all residents know their voting rights. Two of the Support Staff are also parents of students at this school. The community loves this school and are very distressed that the principal wants to limit parent and community access to the building. Since becoming principal, the home and community coordinator position has been cut, popular evening music and art programs cut, the community garden paved over and new fees for building use by community groups have been assessed that are above what the district policy requires.

Problem Solving Scenario

You have received several voice messages about poor working conditions at Growing Tree Elementary – but no one will leave a name or contact – all are anonymous and they even state in their message that they are afraid they will be fired if the principal finds out the union has been called. You have repeatedly checked with the building rep – who corroborates the stories, but says she is not having any issues and can not get anyone who is willing to meet with the UniServ Director. They don't want to be seen talking to the "Union."

From the multiple messages, here is the story you have pieced together. The Literacy Coaches are personal friends with the Principal. All three of them believe that the mostly Spanish speaking community is likely full of illegal immigrants. They have openly stated this and because of this – that is

why they have to crack down on these slackers so children will be able to read and score well on the district reading tests. This school was designated a dual language immersion school – meaning that white, English speaking families can choose to have their students attend in order to learn Spanish. These are the parents and students – in the faculty’s opinion, that these three cater to.

The real problem is a contract violation. Every new teacher is approached by the literacy coaches to sit during lunch in the staff lounge and go over their data – they call it data and dine. This request has never been put in writing, and the new teachers want to keep their “noses clean” so they can transfer after three years. The senior teachers know this is happening and never eat in the staff lounge – and are never asked by the data coaches to do so. The number one complaint of the new teachers – they don’t even have a chance throughout the day to get to the bathroom as lunchtime is their only break.

More Context:

This principal has been investigated several times for bullying Spanish speaking staff – but none of the cases were ever completed as the employees dropped them.

The coaches are bargaining unit members but not active in the union.

The contract requires a 30 Minute duty free lunch for all employees.

Campaign Opportunity 2- Gate Keeper Middle School

This is middle school with a very high Free and Reduced Lunch rate. It is in a neighborhood that people from community say is, "in decline," with a number of the single family homes now converted to multi-family rentals. There is a newly elected head building rep at this building. She attended this school when the neighborhood was still very middle class. Her first job here was as support staff in the special education program. She went to school at night to get her teaching degree and is now striving to be a principal. She has worked to fill the other possible rep positions and held elections for the two open rep seats. Five people ran for the two openings. The head rep is respected by a strong portion of the staff and feels that she gets things done. This head rep reports a strong relationship with the principal – a man with a similar background as hers - and asks that the UniServ stay away – even though the other building reps don't trust that she supports their positions when meeting with the principal.

Because of this school's free and reduced lunch rate, the district has implemented a new curriculum for schools like this, that requires a placement exam to be passed by any student wishing to take Algebra. Many of the math teachers have reported that they don't feel that they were provided enough time to give all their students a fair and equitable chance to be successful. There are a large number of African American parents who are also upset by this policy as they feel it is unfairly keeping their students from taking Algebra.

There is a group of newer teachers who eat each day in one particular teacher's room. These teachers are mostly all African American and feel that the principal has some unconscious bias issues. Most of the people in this lunch bunch are not from Tip Top District and came here because of the pay scale and benefits. This teacher who is hosting this lunch bunch is not a building rep and we don't even know how she feels about the union - but most people agree that they go to her for good advice on working with the parents in the community and the students at this school. They trust her opinion and support. The people who eat in this room believe that ALL teachers should be treated with professional respect by the principal and that it is a problem regarding the inherent racial bias of some of this principal's policies and actions. Even though they have told their head building rep, she won't bring up to the administrator because of her aspirations to be a principal.

Three members of this lunch group have determined a set of actions they could take to improve the placement test problem. They have developed a set of 10 minute meetings, a building member survey and a draft administrative complaint. They have also reached out to their colleagues in other buildings to see if this is an issue in other middle schools and if those schools want to join them in correcting this condition.

Problem Solving Scenario

A new building rep from Bright Skies Middle school just sent you a very detailed email describing a situation that he is very concerned about.

Dear UniServ Director

I am writing to you because I have already spoken to our head rep, and I don't think she understands the situation – or she just does not want to deal with it. I have talked with Vice President Liberaling and he says I should run with any plans I can come up with to solve the problem. I thought I would run the issue by you to see what you think.

We have a policy at our school that before an eighth grader is allowed to take Algebra, they must pass an entrance exam at the end of 7th grade. As you know, Algebra is the gateway to entrance in most colleges and three additional math classes. The large number of requisite courses in this district for high school graduation, along with the number of math requirements, make it very hard to make up Algebra in high school AND take all the other “college ready” courses if Algebra is not taken in the eighth grade.

I am concerned because as an African American, I know that this policy is keeping almost all our black and brown students out of the 8th grade class. There are a number of my colleagues in the 7th grade that are telling the students to simply take pre-algebra in 8th grade because they will have a hard time passing algebra. This issue is compounded by the racially unaware no tolerance policies for attendance, homework, and tardiness put in place by our principal. I have asked our building rep to set up a meeting to discuss this, but she says she is uncomfortable discussing this topic with our principal. She says he is a good guy and just wants to do his best for “those kids.”

A number of us have been developing a plan for meeting with parents, maybe writing a letter of no confidence, or possibly attending a school board meeting to bring up these issues.

I am a new to this building rep work, but this seems like an issue we should be dealing with. What would you suggest that I do?

Sincerely,

Building Rep

Some context:

There is nothing about advancing racial justice issues in the Agreement

The district does have a Racial Equity Framework that is to be applied to all policy decision to ensure unintended consequences have been examined

There have been numerous claims of bias against this principal- but none have risen to official complaints

The neighborhood is known for having a strong activist personality

What will you do?

Campaign Opportunity 3- Higher Ground High School

One of the district's largest high schools has 95 employees with 35% of them in their first 5 years of teaching. There are 6 building reps and 4 of them have been in their position for as long as anyone can remember. One of them recently lost his bid for re-election as EA Vice-President. He was defeated by a new rep from this building. They hold regular monthly building meetings that are attended by about 20 of the most senior members and routinely pass out information from the state and national union. They often discuss problems – but almost never suggest or take action on solutions. The 4 long term reps routinely attend almost every event that their union offers and make full use of their professional and personal leave. These four plan their family vacation to coincide with their regular attendance at the NEA RA. The two newer reps have been engaged with their state and local union and would like to implement some new programs that would lead to more participation by rank and file in the work of the union. The long term reps see this as a way to take away the leadership that they have earned. The newer reps are also interested in getting a number of people to take action against some new, top down “rules” the new principal is putting in place. The long term reps just want to have the Union file a grievance and take care of the issues.

The long term reps say that the number one priority is that there were not large enough pay scale gains bargained into the last contract for those at the top of the scale and that there was an increase in the health insurance premium for single members. These leaders routinely ask the UniServ to come and lead their after school meetings and always include them in any member issue. There have been a number of member calls to the union help-line indicating issues with work-load, length of day, observation and evaluation, school discipline policies, and too much time out of the schedule for testing - but when the long term reps are asked, none are aware that there are any issues. Everything is fine. These reps all have a great relationship with the principal and with their UniServ.

The two new reps live in the same house. They became reps because a sizeable portion of the staff found them respectable and very credible after being participants in a program these new reps designed to help their colleagues better understand how to support LGBTQIA students. They are also co-trainers with a non-profit group that is providing race, equity and diversity training to the staff. These reps volunteer at the teen homeless shelter and want their union to be a place that seeks equity and justice for marginalized youth in the community.

Membership is at 70% with the number of non-members creeping up – especially with new and younger teachers.

Problem Solving Scenario

President Donna DeMiddle has called the Union Office looking for a UniServ Director. She starts the call by saying, “I know that I am supposed to be handling everything myself, but I really want your help with an issue. “

“There are a number of the new staff at Higher Ground High School who wants to file a grievance and they don’t have any one of their building reps that feels it is warranted. Of course, I have only heard from one of our long time reps – and I know he has his finger on the pulse. He says that a few of the new-type folks want to have some sort of uprising or file a grievance but the guys that know how things

work there – think they just need you to come calm the upstarts down. You know, explain that they have to put up with some challenges in the beginning.”

“Here’s what I am told their issue is - the Principal for the high school has asked the teachers that are still in their first three years of teaching or anyone that has a high rate of behavior issues or a below standard evaluation rating to turn in their lesson plans. Because it is mostly the new teachers who are struggling with student behavior – the principal – who is a good guy and always works with the union – just wants them to get their acts together. The members with seniority aren’t too concerned – except that two of our long time reps received poor evaluations last year – so they are going to have to do this new stuff. It’s really the newer folks who feel like this is an inequity in workload – but we all had to pay our dues when we were new, didn’t we?”

“The Principal and the Reps are also a little concerned that there is too much of this equity stuff and not enough attention to good old teaching.”

“So, they need you down there pronto to help bring the newbies into the fold. They need to understand that the role of the union is not to change the world – it is to get them a paycheck and benefits. I can't do the meeting with them because I have to be over at the middle school training. The reps can't do it because they don't want to upset the principal. I really don't know how I am supposed to do all this Union Staff work as the President. Thanks, and I know they will be happy to see you soon. “

Some context:

The state statute and district policy are silent on the issue of lesson plans.

The Agreement, in the section on "Evaluation" requires, " ... demonstration of the ability to plan," as a requisite criterion for successful teaching and it is the purview of the principal whether these plans are required to be turned in.

The other three high schools seem to have teachers doing these sorts of plans, at least nominally, without a peep from anyone.

The entire faculty gets a minimum of five planning periods per week, guaranteed, in the Agreement.

The newer teachers, who did not feel adequately prepared to teach the students in their class – have requested the training and have asked for support in crafting instruction that is equitable for all students.

What will you do?

Campaign Opportunity 4- Sunrise Elementary

There is a long time principal at this school – well liked. This is a heavily impacted school – high poverty, large class sizes, and high non-dominant English speakers. The staff recently unanimously voted to support an in-class breakfast program that causes them to give up 15 minutes of their contractually granted daily planning time. There is a high number of new teachers -20% in their first three years. Membership is at 80% in the certified unit. There is a new assistant principal who was a long time union leader and a National Board Certified Teacher. There is a new Head Building Rep who has been teaching for three years. She believes that it is every employee's responsibility to belong to the union. There are 3 building reps who have developed a system for doing one on ones in their building with a target of reaching all their contacts by mid-year. These leaders have surveyed their colleagues seeking input on issues and have identified three issues that colleagues want to improve – workload, coordination with special education and resource services, community connections. One of the reps is taking on the issue of helping parents understand curriculum requirements and is using her networks within the Latino community to set up meetings at local churches and the community center.

Attendance at the monthly RA from these reps is 100% and they have a 100% return from their building level colleagues on a recent Commitment to Vote campaign. This school has signed up to host a school board candidate at their next staff breakfast and invite them to see the breakfast in the classroom program. These members have increased their PAC contributions by 30%. They have sent three teams of 7 to the union led summer professional development and leadership programs. Members at this school have designed and led a number of professional learning groups based in what they determine is most useful for their students. Members at this building tend to contact their UniServ for information, resources and to “double-check” if actions they have planned make sense and are in keeping with sound practice.

The support staff in this building feel like they are invisible – especially to the classroom teachers. While the teachers are not particularly happy about the breakfast in the classroom program – it has been an enormous shift in the amount of work expected of the kitchen and office staff. The kitchen staff are expected to do more, within the same amount of hours with no down time for clean-up prior to getting ready for the early lunch wave. The office staff are in charge of delivering the breakfast to the classroom, doing lunch accountability and handling clean up – while still trying to cover phones and attend to access for the building via the front door and security sign-in. The one Support Staff building rep has a small group of members who want to do something – but they don't know who they can get to help them or join them in making a change.

Problem Solving Scenario

Velma Overly the Support Staff President wants to get some answers for her members – and potential members at Sunrise Elementary – specifically the kitchen and office staff. She is sitting in your office when you arrive in the morning and jumps right in ---

“Well, I think I have finally done it! I have found the issue that will get those non-members at Sunrise to sign-up. I am tired of having to do stuff for them when most of them are free-riders.”

“You know Sunrise, it is that huge elementary with all those before and after school programs and has both of the homeless shelters for families in its neighborhood. They also have a dual language and a Pre-K program – lots of Support Staff there along with a big lunch program. Due to all the services and rather transient family population – there is also quite a large office staff group. Anyways – I know the issue that is finally going to get them to see the value in the union!!”

“Sunrise got a federal grant to provide breakfast in the classrooms. No one is happy about it. It is a mess, teachers are losing 5 minutes off their morning planning time AND the kitchen staff have no down time between prepping and sending the breakfasts out to the classrooms and getting lunch ready – because of the size of the school, the first lunch wave for Pre-K is at 10:30. Of course – the principal will not give the kitchen staff more hours because then 5 of them would become eligible for health insurance.”

“The office staff are none too happy either – they have to deliver and pick up the breakfasts at each of the classrooms – it is a huge school and that means that it takes nearly all of them off the phones, the entry scanner and other front office issues. Mornings in that school’s office are a jungle.”

“I want the Union to lead the charge to get rid of breakfast in the classroom! I know the teachers would jump in on this issue too!”

Some context:

This neighborhood is the poorest most densely populated in the county and food insecurity is a top issue

It is true that the breakfast in the classroom program does infringe on the Certified Members contract – but not the Support Staff contract – as they are hourly and the building principal sets hours.

This is one of the hardest to staff buildings in the county, and this is the building with the lowest Support Staff membership density.

What will you do?

Campaign Opportunity 5- Tip Top District and the Tip Top Education Association

This is a mid-size school system consisting of 65 schools. There are about 3,700 employees that could be covered by either the Certified Employees Contract or the Support Staff Contract. There are 2,900 total members – 1,600 are certified members and 1,300 are support staff (bus drivers and custodians are represented by two other unions). There are 700 non-members in the certified unit, and 5 non-members in the support staff unit. The trend for both units has been membership declines especially in new to the profession certified employees and kitchen workers.

For the most part, most members tend to call the union staff or executive leaders directly with questions and problems instead of using their representative system. Union meetings are not well attended. Only about half of the building reps attend monthly meetings and engagement in actions is often driven by staff. On the last contract ratification vote only 28% of the members voted.

The district is facing a number of challenges. The long-term and popular Superintendent and a number of long time school board members have just changed. Their replacements are focused on raising expectations and holding educators responsible for student success. There have been substantial cuts coming from the state to support school budgets. This means that the school board is seeking a raise in property taxes. The most recent negotiations were closed and the final results contentious. There is a growing narrative from the public that the school system is only concerned in seeking higher wages and maintaining a rich benefit package. The educators in this district are some of the most well-paid employees in the community. This once, relatively middle-class and white district has transitioned in the past five years to majority non-white district with non-dominant English speakers making up the majority of K-3 students. Despite these changes in student population, the certified employees remain 95% white, mostly women and mostly English only speakers. Support staff tend to be more reflective of the county population, with large numbers of them living in the “affordable” neighborhoods.

The elected, executive leadership of the unions consists of:

President of Certified, Donna DeMiddle– a middle-aged, middle-class, suburban living, white woman that taught middle school for 22 years. She is a full-time release president. She is a native of Enchanted County and graduated from the district. She was chief negotiator for the new contract. She simply wants to return to the days when parents took responsibility for their children and sent them to school with proper values. She remembers when her UD came to her and did the work of the union that she paid for – bargained, talked to those in power and made sure her rights were protected. She has grown dissatisfied with the way that the newer union staff do their work. She would like to become a UD someday and feels she could do a better job.

Vice President of Certified, Stavon Liberaling– relatively new to the profession – 6 years of experience – high school teacher in one of the largest, poorest, most diverse schools in the city by choice. He has purposely purchased and is rehabilitating a home in the neighborhood of the school he teaches in. Stavon’s parents are immigrants and he wants to ensure that all immigrants and their children have access to the community resources they deserve. He wants the union to use its power in ways that allow members to fight the injustices that matter most to them and the community. He ran a slate with the newly elected Secretary and Treasurer who are on the newer end of the profession – both are elementary school teachers - and won

primarily because they have openly criticized the current contract bargained by the current President.

President of Support Staff Velma Overly – a long-time employee working out of the office of the districts' largest high school. Her native language is Spanish and she is known widely throughout the county's large Spanish, catholic church system. She is a leader in her church and she is widely respected by her members – but not the president of the certified union. She is not a full-time release like the certified president, and due to her work schedule often has to miss important organizational meetings due to the timing set by the Certified Union leadership. She wants to make sure that her members jobs are not contracted out and that they see their union as a place of connectivity. Velma a much loved and respected leader – but she does everything for her members. She has made it her life calling to serve her church community and her union. There is no vice president or other officers for the Support Staff Union – there could be, but members site limited time and that Velma does a great job for them anyways. She is a bit frightened at the thought of public actions – but knows these have been effective in other places.

Problem Solving Scenario and Context:

A salary schedule was recently settled with an 8% increase in salary, but the members did not completely understand what would be expected in return for this increase in salary. The school year was lengthened by five days as well as the school day by 40 minutes. Many of the newer members are increasingly unhappy with the district and especially with their elected union leadership. The more experienced members who remembered the previous collaborative relationship between union and district were neither as angry nor as vocal as the newer members - and they staunchly defended the district and its practices and labeled dissenters as unprofessional and not wanting the best for kids.

This local is in turmoil. The newer teachers have felt ignored by their association leaders for the last couple of years and feel that the new contract unfairly burdens younger, newer members who are trying to raise young families, work second jobs to afford mortgages and attend night courses to achieve permanent certifications. They have started calling the vice-president INSTEAD of the president and shared with him their deep unhappiness with their new work load. They want to take actions that would bring attention to their issue. Several long time members of the local, including the President feel that doing visible union actions is a negative for the profession, a feeling strongly shared and articulated by several key central office members.

The Support Staff Association is about to enter bargaining with the new superintendent and school board who have made it clear that they are looking at sub-contracting to cut costs. The President – Velma Overly is accustomed to doing most of her bargaining one on one with the superintendent and plans to approach this upcoming bargaining in the same manner. Velma has not reached out for any support or coaching about bargaining but you have heard from a number of building reps who attended the last meeting that there a lots of issues that members would like to address in bargaining and Velma seemed overwhelmed or dismissive.

Checklist for Starting a Coalition

What is a coalition?

___ You know that a coalition is a group of individuals and/or organizations with a common interest who agree to work together toward a common goal

Why start a coalition?

___ To address an urgent situation.

___ To actually obtain or provide services.

___ To bring about more effective and efficient delivery of programs and eliminate any unnecessary duplication of services.

___ To pool resources.

___ To increase communication among groups and break down stereotypes.

___ To revitalize the sagging energies of members of groups who are trying to do too much alone.

___ To plan and launch community-wide initiatives on a variety of issues.

___ To develop and use political clout to gain services or other benefits for the community.

___ To create long-term, permanent social change.

When should you start a coalition?

___ You respond to dramatic or disturbing community events

___ You react to new information

___ You respond to changes in circumstances or regulations

___ You take advantage of new funding

___ You address an outside threat

___ You try to create significant change in the community

___ You form a coalition when trust and perception of a need make it possible

___ You recognize the barriers to starting a coalition.

Who should be part of a coalition?

___ You include stakeholders, both beneficiaries of the work of the coalition and those otherwise affected by it.

___ You include opinion leaders.

___ You include policy makers.

___ You include members of the community at large

How do you start a community coalition?

___ You form a core group.

___ You identify necessary coalition members.

___ You recruit coalition members, using appropriate means:

- Personal contact
- Phone
- E-mail
- Letter
- Advertising
- Posters and flyers.

___ You plan and hold an inclusive and exciting first meeting, where something actually gets done and people leave with assignments and the next meeting scheduled.

___ You follow up on the first meeting, checking on assignments, reminding people about the next meeting, and continuing to recruit new members.

You continue to pursue the important tasks started at the first meeting:

___ Defining the issue and drafting vision and mission statements

___ Developing an action plan

___ Working out an acceptable coalition structure

___ Deciding on the need for professional staff

___ Obtaining resources.

You continue to pay attention to the general guidelines for coalition success:

___ Free, open, and multi-directional communication

___ Inclusiveness and participation

___ Networking

___ Setting reachable goals

___ Holding creative meetings

___ Being realistic about what the coalition can do

___ Acknowledging and using diversity

___ Rewarding accomplishment and celebrating success

Checklist for Maintaining a Coalition

__ You understand that maintenance of a coalition and other social partnerships is as important as physical-world maintenance for optimal functioning.

__ You have made a decision to engage in maintenance, considering the various parts of the coalition that need attention:

- The coalition's reason for being-its vision, mission and objectives
- The basic governance and operating rules of the coalition
- The coalition leadership
- The coalition membership
- The division of labor, within and among the leaders and members
- The coalition's strategic and action plans, both short-and longer-term
- The coalition's actions and results, so that it is accomplishing something (what it means to) in the world
- The coalition's funding, so that those accomplishments can be continued
- The coalition's visibility in the larger community
- The coalition's public support
- The spirit of the coalition

__ You have designed a maintenance plan, deciding:

- who should design the plan (or multiple plans if appropriate)
- how comprehensive the plan should be
- how formal the plan should be
- who should carry out the plan
- how frequently maintenance should take place

__ You carry out your maintenance plan, including external or internal review. Internal review may be formal or informal.

__ You consider and choose, if appropriate, alternatives to maintaining the coalition

- Growing
- Spinning off
- Changing focus
- Cutting back
- Ending
- Staying the way you are

Contributor

Phil Rabinowitz

Workplace Violence

Background: You are a staff Organizer or UniServ Director who works with a school district/building that has been experiencing an untenable amount of student violence. Members have asked you for help, and you in-turn have done some investigation, talked to some employees, requested some information from the school, but you don't have a complete picture of the issue yet.

After having met with several individuals and small groups of stakeholders, you believe there is enough shared issue awareness that pulling together coalition of school and community members would be useful towards addressing the problem of student violence in this district/building.

Objective: Assess the participants of a coalition meeting to determine the characteristics of the participants, what roles they might they fill, and how you might manage coalition participants towards meeting coalition goals.

Directions: Slips of paper have been passed out which indicate your role, background, and school district.

When directed, you will go to the corner of the room where your school district coalition meeting is being held.

For this simulation, one person will be the chair for the meeting (they are the Association staff person). Their function is to guide the group through the meeting.

The other members at the meeting will assume the character described in their slip, but not reveal their character until debrief.

The meeting will be 10 minutes in duration, after which the whole group will reveal their characters and discuss the experience.

The Meeting

The Chair person (Association staff) will introduce themselves and then ask each coalition participant to introducing themselves, encouraging the participants to share what they perceive the issue or problem to be at the school district/building.

The chair will lead the group with guiding questions like:

- What is the cause or consequence of student violence at our school (issues)?
- What kinds of things can our group actually do (goals)?
- How do we want to organize ourselves to achieve our goals? (structure)

Member Type	Description	Community Sector	Barrier	How they Joined
The Wallflower	This member likes to sit and listen, but very rarely actually contributes to the group. This member often has a lot to contribute when others seek their input.	Health/Medical community sector		Asked by a colleague to attend this coalition meeting.
Member Type	Description	Community Sector	Barrier	How they Joined
The Brainstormer	This member is all ideas, some of them good. Sometimes this member has so many ideas that the entire meeting is taken up discussing their many ideas, without ever really making a decision to adopt an idea or to develop any concrete planning. This member commonly interrupts others to share their ideas on a concept, and often forces the meeting off the agenda. This person very rarely volunteers to take on tasks, preferring to just talk. This member likes to persuade others over to their way of thinking.	Professional/Trade Association sector	(Bad History) Has bad history with the Dominator – their organizations had a conflict in the past that neither party has been able to get over	Found out about the meeting via social media and decided to attend.
Member Type	Description	Community Sector	Barrier	How they Joined
The Cynic	This member doesn't think anything will work. This member can usually list a million reasons why something is not a good idea. This member has vast and unprecedented experiences in failed projects and usually will state, "I've tried it and it doesn't work'.	Business/Labor/Employment sector	(Turf) Has issues with sharing work, their target populations and especially their funding.	Staff organizer cold called them and convinced him/her to attend.
Member Type	Description	Community Sector	Barrier	How they Joined
The Eternal Optimist	This member always thinks a project will be successful. Sometimes this member likes an idea so much they have trouble taking a realistic look at the pros and cons of a project, as well as the actual time or resources a project will consume. However, this member can be a great cheerleader for a project when times are tough.	Local Community Member sector	(Poor links to the Community) Recently moved into the area and doesn't know the community or its history very well.	Found out about the meeting via social media and decided to attend.

Member Type	Description	Community Sector	Barrier	How they Joined
The Evaluator	This member is very good at bringing the pros and cons of a subject to the table. While this member is sometimes good at seeing all sides, other members should be warned that they sometimes have trouble presenting information in an unbiased way. Others often see this member as 'caught up in numbers and outcomes'.	Government/Legislative community sector	(Dominating Elite) Has a tendency to rush to solve problems or to 'help the disadvantaged' and in doing so sometimes will neglect to involve the people most affected by the issue at hand and other community members.	Joined the group through Action Network.
Member Type	Description	Community Sector	Barrier	How they Joined
The Volunteer	This member is always the one who says, "I'll do it". This member often quits or leaves the group feeling burnout or that they're the only one who ever actually does anything. Other members often take advantage of this member, and will sit quietly during task assignment hoping that the Volunteer will feel obligated to take on all of the tasks. This member is the workhorse of the group, and is the mechanism by which the group is often successful.	Local Community Member sector	(Time & Loyalty Conflicts) Is involved with multiple community groups.	Asked to attend the meeting by email blast.
Member Type	Description	Community Sector	Barrier	How they Joined
The Leader	This member may or may not actually have a 'position' within the group. This member keeps the group on task and can usually bring the other members back to the topic and on task. This member can help others to see the big picture when they are bogged down in details. This member is often also a Volunteer.	Recreational Organizations/Facilities community sector.		Joined via Action Network.

Member Type	Description	Community Sector	Barrier	How they Joined
The Dominator	This member wants to be in charge. Often this member is the one who is always speaking. This member also usually has a 'sub-type' (i.e. Brainstormer, Cynic, etc) that is present as well. Other members often avoid this member or may not return to future meetings just to avoid this member. This member can easily get their feelings hurt when confronted.	Religious/Faith-based sector	(Bad History) Has a bad history with the Brainstormer – their organizations had a conflict in the past that neither party has been able to get over.	Asked by a colleague to attend this coalition meeting.
Member Type	Description	Community Sector	Barrier	How they Joined
The All-Around	This member has a good mix of the traits of the other types of members. This member can stick up for their cause, but allows the opinions of others. Often volunteers for tasks or leadership positions, and works well with others. This member is well-rounded in attitude and is usually well liked by others. Other members might say 'The All Around knows when to talk and when to be quiet'	Food Services sector.		Found out about the meeting via social

Coalition Member Callout!

Directions: As the meeting is going on, try to figure out the member types in your coalition. After the meeting, think about if they have barriers and how they could contribute or be managed.

Member Type	Who might be this member? [name]	What (if any) is their Barrier?	How might this member contribute (role) and/or how might you manage this member in your coalition?
The Wallflower			
The Brainstormer			
The Cynic			
The Eternal Optimist			
The Evaluator			
The Volunteer			
The Leader			
The Dominator			
The All-Around			

CAMPAIGN MOUNTAIN

Phases of a Campaign

