

# VEA Staff Resources



## Organizing 2 Bargain

UniServ Directors are the first line of contact between the workers in our public schools and the state and national affiliates. The challenges of workload, shifting priorities and having an organizing mindset in the face of overwhelming requests for service make the job a challenging and complex one. Organizing 2 Bargain will help you build and calibrate your current skills, knowledge and dispositions with the goal of our campaign.

## Participant Resources

The resources compiled here are to support your learning while in our trainings and to provide you enough content and framing for continued application of the skills and concepts presented.

# Getting Started Task Sheet

This resource package is designed to fill in the gaps in learning that exist between what would have been a traditional, face-to-face, working training – and our current situation of living in ZOOM Town. We have created 8, 90-minute online modules across 3 days, that will be facilitated by your peers. These modules are designed to provide some basic content and continuity AND allow real time to accomplish team planning. In order to make the most of our time together in ZOOM Town, we are asking you to do a number of short, meaningful tasks prior to our modules that will be used during your time with colleagues. These tasks should be completed prior to our first meeting on December 2. You will want this resource package available throughout the 3 days.

## Meeting Schedule

| Day 1 – December 2                                                                          | Day 2 – December 4                                                              | Day 3 – December 7                                   |
|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|------------------------------------------------------|
| Module 1 – 9:00 – 10:30<br>Our Campaign and Our Goals                                       | Module 4 -9:00 – 10:30<br>What are our People willing to do?                    | Module 7 – 9:00 – 10:30<br>Work Session – Data Focus |
| Module 2 – 11:30-1:00<br>Organizing for Strength and Growth                                 | Module 5 – 11:30-1:00<br>Work Session – Issues, Targets, Wins                   | Module 8 – 1:00 -2:30<br>Peer Presentation           |
| Module 3 – 2:00-3:30<br>Who are our People? Who are our Leaders? What are their Structures? | Module 6 – 2:00 -3:30<br>Work Session – Narrative, Strategy, Structure, Tactics |                                                      |

## Meeting Links

|    |                                                                                                                                                                                                                      |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | <a href="https://nea-org.zoom.us/j/96578727085?pwd=WmNhOThWZ0tCd1pROTAxalpyR1drUT09">https://nea-org.zoom.us/j/96578727085?pwd=WmNhOThWZ0tCd1pROTAxalpyR1drUT09</a><br>Meeting ID: 965 7872 7085<br>Passcode: ZN673d |
| 2. | <a href="https://nea-org.zoom.us/j/98314972478?pwd=TE8rN3J6ZTVUNWZLMnZnUzN0MTRTQT09">https://nea-org.zoom.us/j/98314972478?pwd=TE8rN3J6ZTVUNWZLMnZnUzN0MTRTQT09</a><br>Meeting ID: 983 1497 2478<br>Passcode: 6kc3rK |
| 3. | <a href="https://nea-org.zoom.us/j/98207109586?pwd=OFIGNi9QNmpGYjhDZ3NGUVRYeUM1dz09">https://nea-org.zoom.us/j/98207109586?pwd=OFIGNi9QNmpGYjhDZ3NGUVRYeUM1dz09</a><br>Meeting ID: 982 0710 9586<br>Passcode: W11#qN |
| 4. | <a href="https://nea-org.zoom.us/j/94274969056?pwd=RnFDYmRNQUV3TG9WbFlrTUJ1a0xvZz09">https://nea-org.zoom.us/j/94274969056?pwd=RnFDYmRNQUV3TG9WbFlrTUJ1a0xvZz09</a><br>Meeting ID: 942 7496 9056<br>Passcode: 9U+Cai |
| 5. | <a href="https://nea-org.zoom.us/j/96163333533?pwd=T1BDOVh5eEppQUhVYWVjQ1c3ZnBHZz09">https://nea-org.zoom.us/j/96163333533?pwd=T1BDOVh5eEppQUhVYWVjQ1c3ZnBHZz09</a><br>Meeting ID: 961 6333 3533<br>Passcode: #3tTP* |
| 6. | <a href="https://nea-org.zoom.us/j/96370968702?pwd=TFNlcW1EZGRhSm9ZeFdrUHNjY0I5QT09">https://nea-org.zoom.us/j/96370968702?pwd=TFNlcW1EZGRhSm9ZeFdrUHNjY0I5QT09</a><br>Meeting ID: 963 7096 8702<br>Passcode: pS+cA8 |
| 7. | <a href="https://nea-org.zoom.us/j/98168932645?pwd=S1RTQmpVTGdVUTlPaUtUWHVaYlNwQT09">https://nea-org.zoom.us/j/98168932645?pwd=S1RTQmpVTGdVUTlPaUtUWHVaYlNwQT09</a><br>Meeting ID: 981 6893 2645<br>Passcode: %c8JH5 |
| 8. | <a href="https://nea-org.zoom.us/j/96440517456?pwd=eGNHdmRSZlpcUxETHN2b042Y2ZEdz09">https://nea-org.zoom.us/j/96440517456?pwd=eGNHdmRSZlpcUxETHN2b042Y2ZEdz09</a><br>Meeting ID: 964 4051 7456<br>Passcode: NS5%!@   |

**Task 1:** Using the document “Community Agreements” found on Page 6 reflect on each of the agreements and record your thinking in the table below: Approximate time to complete 15 minutes

| The agreements that I think will help me the most as a member of this community are: | Agreement that I believe I need to be successful in this community but are not yet listed are: | Agreements that I don't yet understand and would like to clarify are: |
|--------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
|                                                                                      |                                                                                                |                                                                       |

**Task 2:** Using the document “Core Values” found on page 7 , brainstorm and be prepared to share – ACCORDING TO THE DIRECTIONS on the document - at least one of your core values. Approximate time to complete 15 minutes

**Task 3:** You will need to have read the following three articles found on pages 28 - 55 , - Approximate time to complete 60 Minutes

- How Organizations Develop Activists
- Services are Bad for People
- The Power of Deep Organizing

**Task 4:** You will need to read, “Leadership in the Age of Complexity” found on page 72 , Approximate time to complete 20 Minutes

**Task 5:** You will need to have as much access as possible to the following information – Approximate time to complete depends.

- List of your locals and/or worksites
- Lists of members (non-members?) - numbers of each if possible
- Lists of leaders

**Task 6:** Review the structure and contents of this package just so that you are aware of what is available as you work during our modules. Approximate time to complete 10 minutes

# Organizing 2 Bargain



## Module 1 – Our Campaign and Locals

Thinking of UniServ work as a set of campaign plans helps to refocus the day to day demands of service providing to the longer term work of organizing. A strong campaign plan results in visible wins for the union, develops more leader, attracts more members, and allows for a collective use of resources to win meaningful change. The frameworks in this toolkit will help you in making an effective campaign design with leaders and members.

**Institute Facilitator**  
Ellen Holmes, NBCT  
[eholmes@nea.org](mailto:eholmes@nea.org)



# Community Agreements

(Adapted from Race Forward and Courageous Conversations)

1. Share Responsibility for the Success of Each Session
  - Complete concept task prior to logging in
  - Test ability to connect and troubleshoot prior to logging in
  - Log in in a timely manner and if late, enter in quietly
  - Wear headphones with a microphone to limit feedback
  - Remain muted until you are speaking
2. Move up, Move Back – Participate Fully and Evenly
  - Consider your privilege in group conversations
  - Help invite the voices of those that have not yet been heard
  - Make use of the chat area for additional questions, ideas, or resources
3. Respect Confidentiality
  - Share ideas and learning without attributions
  - Keep the session open only to those that are registered
4. Listen Well for Deep Understanding
  - Be fully present and open to new learning
  - Limit other device activities and stay checked in
  - Share using “I” statements
  - Experience Discomfort- Connect with Your Feelings
5. Expect and Accept Non-Closure
  - We are all in different places with different perspectives
  - Our own truths are valid and need not be the same
  - We may never come to full agreement
6. Expect and Accept imperfection

## Core Values

*Core values are the fundamental beliefs of a person. These guiding principles dictate behavior and can help people understand the difference between right and wrong. These can often be expressed in one or two words.*

### What are the core values that drive my work?

List as many or as few as you think is helpful. Reflecting on this question regularly can help keep you focused on “why” you do this work.

| <b>Work Space</b> |
|-------------------|
|                   |

*Core Values can act like an anchor for us in our work. They are also the way that effective organizing cultures operate – groups of people affiliated around a set of values, all working purposefully to achieve a common goal. When we are unsure and feeling overwhelmed by what we are supposed to be doing, a good reflect and check is to ask, “does this align with my/our core values?”*

# VEA Organizing to Bargain Campaign

## Month X Month Plan

September 2020 through November 2020 (Fall 2020)

| Categories                                                         | SEP 2020                                                                                            | OCT 2020                                                                                                                                                                                                                                                                                                     | NOV 2020                                                                                                                                                                                                                                    |
|--------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Local Organizing – Lighthouse Locals</b>                        |                                                                                                     |                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                             |
| Representation elections/Certification of Exclusive Bargaining Rep | Meeting with VEA attorneys re possible timeline for rep election – legally feasible and defensible. | <p>Feasible and defensible “exclusive bargaining rep (EBR)” process is drafted by VEA/NEA attorneys.</p> <p>Model EBR process is reviewed by staff organizers and VEA leadership/governance.</p> <p>Research city/county employees’ and firefighters’ positions on rep election: timing, oversight, etc.</p> | <p>VEA leadership determines best process(es) for rep elections.</p> <p>Process(es) outlined at Nov/Dec UD staff meeting on Organizing to Bargain Campaign.</p>                                                                             |
| School board resolution                                            | Draft notification from local EA to school board of “intent” to bargain beginning on May 1, 2020.   | <p>Notice of intent to bargain presented to decision-making bodies in 5 locals for consideration.</p> <p>Research plans on the support level – pro/?/con -- of school boards developed for use by lighthouse districts.</p> <p>Work with other unions on elements of model ordinance/resolution.</p>         | <p>First notice of intent to bargain filed by local EA with school board.</p> <p>Research on school boards begins post Nov 3 election in lighthouse districts.</p> <p>Work with other unions on elements of model ordinance/resolution.</p> |
| Organizing team/Expanded bargaining team                           | Meetings held with leadership groups in 10 locals.                                                  | Meetings with local leadership continue, in an additional 5 locals.                                                                                                                                                                                                                                          | First organizing teams (expanded bargaining teams) are established in at least 5 locals through election or appointment.                                                                                                                    |

## VEA Organizing to Bargain Campaign

| Categories                                            | SEP 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | OCT 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | NOV 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Meetings with local leadership continue, in an additional 5 locals.                                                                                                                                                                                                                                                                                                                                                                                                           |
| Member engagement                                     | <p>Member outreach/engagement underway in locals around Covid-19 issues.</p> <p>Build worksite level structures for member action and communication.</p> <p>Link to how bargaining would provide a more meaningful relationship with school division on critical policy issues.</p>                                                                                                                                                                                                                                                                                     | <p>Member outreach/engagement underway in locals around Covid-19 issues.</p> <p>Build worksite level structures for member action and communication.</p> <p>Link to how bargaining would provide a more meaningful relationship with school division on critical policy issues.</p>                                                                                                                                                                                                                                                                     | <p>1:1's start at worksite level in 5 locals committed to filing for CB status on May 1.</p> <p>Member outreach/engagement underway in locals around Covid-19 issues.</p> <p>Build worksite level structures for member action and communication.</p> <p>Link to how bargaining would provide a more meaningful relationship with school division on critical policy issues.</p>                                                                                              |
| <b>Local Outreach -- Leadership &amp; List Locals</b> | <p>Develop three objective tiers based on 2020 readiness assessments from staff and leaders: Lighthouse locals – those EAs sufficiently organized and with enough union density to consider filing for rep status in 2021; Leadership locals – those EAs requiring additional infrastructure work; List locals – locals with low membership density and incomplete leadership structures.</p> <p>Draft benchmarks locals must reach to move from one tier to another – such as, increased union density, creation of a membership or organizing committee, building</p> | <p>First draft for overall local targeting completed by Oct 31.</p> <p>Targeted list of locals expanded to 40, with locals assigned to one of three levels – more than 1/3 of VEA locals involved, with more than 50% of VEA members in a local moving toward collective bargaining status.</p> <p>Two most likely to succeed locals selected. Organizers assigned to work directly with those 2 locals.</p> <p>Every UD has identified and is working with at least one possible lighthouse local, with direct assistance from NEA staff in state.</p> | <p>Outline development plans for leadership and list locals.</p> <p>NEA staff and temp organizers continue work in lighthouse locals in their assigned “Hub &amp; Spokes” area.</p> <p>Develop benchmarks/criteria for moving local from one group to another.</p> <p>Compare 2021 General Assembly electoral targets with the CB readiness assessment.</p> <p>Propose adding key 2021 targets to lighthouse locals if needed to build capacity in certain select locals.</p> |

## VEA Organizing to Bargain Campaign

| Categories                                                         | SEP 2020                                                    | OCT 2020                                                                                                                                                                                                                                                                                                                                          | NOV 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                    | reps/worksites leaders in 50% of buildings.                 |                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Management and Governance of Organizing to Bargain Campaign</b> | Monthly progress report submitted to VEA President and Exec | <p>Monthly progress report submitted to VEA Exec Director.</p> <p>VEA BOD briefed on campaign progress and overall plan.</p> <p>Organizing to Bargain Campaign is a regular item on VEA mgmt., exec comm., and board agendas.</p> <p>Management of campaign – structures, roles and responsibilities are drafted for review by Exec Director.</p> | <p>Quarterly goals for Dec '20 – Feb '21 submitted to VEA Exec Director.</p> <p>Monthly progress report submitted to VEA Exec Director.</p> <p>Management of campaign – structures, roles, and responsibilities – are defined and shared with staff and leadership.</p> <p>Initial Meeting of Statewide Organizing to Bargain Action Task Force – AKA: SOBC-ATF – elected leaders from the 20 to 25 local EAs committed to filing a “notice of intent” to bargain with their school board in 2021. Task Force has two main purposes: (1) share information on local organizing efforts, compare notes; (2) develop campaign recommendations for consideration by VEA Convention delegates in March 2021</p> <p>.</p> |
| <b>Data and Research</b>                                           |                                                             | Post job announcement for membership data staff person to manage member/potential member data for UDs and local leaders.                                                                                                                                                                                                                          | Hire membership data staff person to manage member/potential member data for UDs and local leaders.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## VEA Organizing to Bargain Campaign

| Categories            | SEP 2020                                                                                                                                                       | OCT 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | NOV 2020                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       |                                                                                                                                                                | <p>Analyze lists in targeted “lighthouse” locals re reliability and extent of contact info for member/potential members.</p> <p>Staff assigned to oversee research and report out on activities of other groups/orgs re collective bargaining.</p>                                                                                                                                                                                                                                     | <p>Assign staff to research, monitor, and report out on labor allies, school boards and opposition groups</p> <p>Gather data on job classification and compensation in targeted locals.</p> <p>Continue analysis of member/potential member data in lighthouse locals, expand analysis to leadership and list locals.</p> <p>List acquisition strategies developed and shared with all UD.</p> <p>Membership data flowchart drafted.</p> |
| <b>Communications</b> | <p>Benefits of CB piece – comparing CB states to non-CB states.</p> <p>Begin revising previous Comms plan, with renewed emphasis on internal member comms.</p> | <p>Draft comms plan for internal member comms for NEA consultant.</p> <p>Gain NEA support and funding for Comms consultant for Nov – Feb for internal member comms.</p> <p>Initial data, info packet completed on benefits of CB.</p> <p>Discuss strategic use of a member/potential member poll on CB. Polling strategic memo drafted – what we hope to learn.</p> <p>Discussion underway re online issue organizing campaign – possibly tied to ed funding in legis session – to</p> | <p>Start NEA consultant contact shortly after Nov election.</p> <p>Develop possible CB content for VEA and targeted locals’ web pages and social media sites.</p> <p>Decision made whether to move ahead of member/potential member opinion poll on CB. Polling timeline defined.</p> <p>Decision made on whether to launch online issue campaign to promote VEA as the pro-public ed educator campaign in VA.</p>                       |

## VEA Organizing to Bargain Campaign

| Categories                           | SEP 2020                                                                                                                                                                                                                                                                                                                            | OCT 2020                                                                                                                                                                                                                                                                            | NOV 2020                                                                                                                                                                                                                                                                         |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                      |                                                                                                                                                                                                                                                                                                                                     | promote VEA as the pro-public ed educator union in VA and mitigate potential opposition from SBs and Sups to collective bargaining.                                                                                                                                                 |                                                                                                                                                                                                                                                                                  |
| <b>Collective Bargaining - Local</b> | Emulate collective bargaining best practices by organizing and negotiating over terms and conditions of school re-openings and Covid-19 related school division policies in targeted locals.                                                                                                                                        | Emulate collective bargaining best practices by organizing and negotiating over terms and conditions of school re-openings and Covid-19 related school division policies in targeted locals.                                                                                        | Emulate collective bargaining best practices by organizing and negotiating over terms and conditions of school re-openings and Covid-19 related school division policies in targeted locals.                                                                                     |
| <b>VEA Membership</b>                | <p>Determine timing of a 3-phase Extended Member Organizer program.</p> <p>Select locals for initial extended Member Organizer drives.</p> <p>Work with USAC to coordinate membership goal and drives for the year.</p>                                                                                                             | Work with NEA to institute and fund a 3-Phase extended member organizer program in targeted locals.                                                                                                                                                                                 | <p>Kick-off Extended Member Organizer program post-Nov 3 election.</p> <p>Work with USAC to coordinate membership goal and drives for the year.</p>                                                                                                                              |
| <b>Training</b>                      | <p>Confirm Apr 30 – May 1 Organizing &amp; Bargaining Conference (OBC).</p> <p>Inform NEA Collective Bargaining of conf dates.</p> <p>Schedule staff organizing training for early Dec and request assistance from NEA staff to conduct training.</p> <p>Collective Bargaining Cadre assigned to develop, oversee and implement</p> | <p>Decision made whether bargaining conference will be virtual or in-person. If in-person, site selection process begins.</p> <p>Plan staff organizing training working with NEA C4O.</p> <p>Members of Collective Bargaining Cadre attend virtually Oct 24 NJEA CB Conference.</p> | <p>Hold staff organizing training conducted by NEA staff.</p> <p>Co CB Cadre begins planning April 30/May 1 Organizing to Bargain Conference for teams from locals across the state.</p> <p>Organizing to Bargain conference is promoted to local leaders in all VEA locals.</p> |



## VEA Organizing to Bargain Campaign

| Categories                        | SEP 2020                                                                                                                                 | OCT 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | NOV 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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|                                   | bargaining training programs for leadership and staff.                                                                                   | <p>Collective Bargaining Cadre offers session on CB at ESP conference.</p> <p>Several (2-3) bargaining trainings hosted by Dr. Fedderman for local leaders are scheduled for November, January and February.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <p>First Dr. Fedderman bargaining training for local leaders in late November.</p> <p>Promote other leader trainings on bargaining hosted by Dr. Fedderman.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Staffing and Team Building</b> | <p>Regular Monday staff meetings to update/coordinate campaign.</p> <p>Hire Fairfax organizer.</p> <p>VEA All Staff meeting – Sep 24</p> | <p>New UD Manager for Organizing and Bargaining starts work on Oct 26.</p> <p>Hire 3 to 5 temp organizers for the Organizing to Bargain Campaign.</p> <p>Staffing structure for campaign in place and responsibilities are defined.</p> <p>Shared staffing and Membership Organizer plans drafted and submitted to NEA.</p> <p>Three key staff work groups (cadres) established to implement work related to collective bargaining:</p> <ol style="list-style-type: none"> <li>1. Hub and Spoke Cadre (see description below)</li> <li>2. Membership Cadre</li> <li>3. Collective Bargaining Cadre</li> </ol> <p>Cadres meet monthly except July.</p> <p>“Hub and Spoke” staff representatives, Cadre chairs for Membership and Collective Bargaining are added once a month to the weekly organizers staff</p> | <p>Executive steering committee established for campaign. VEA Exec Director, UniServ Director and Manager, and NEA Regional Director meet bi-weekly to monitor campaign progress.</p> <p>Shared staffing and Membership Organizer plans approved by NEA. Implementation begins post Nov 3 election for Phase 1. Ends early December.</p> <p>Staff meeting in early November – after October 26 – devoted to Organizing to Bargain Campaign, outlining goals, structure, month x month plan, and who’s responsible for what.</p> <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p> |

## VEA Organizing to Bargain Campaign

| Categories                                        | SEP 2020                  | OCT 2020                                                                                                                                                                                                                                      | NOV 2020              |
|---------------------------------------------------|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
|                                                   |                           | <p>meeting – a regular monthly meeting. This is referred to as the Hub and Spoke Cadre meeting.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p> |                       |
| <b>Election 2020 and Legislative Session 2021</b> | Sep – Early voting begins | Oct 23 – last day to file for absentee                                                                                                                                                                                                        | Nov 3 Election Day    |
| <b>Key Dates</b>                                  |                           | Oct 16/17 – VEA BOD Meeting                                                                                                                                                                                                                   | Nov 3 -- Election Day |

# VEA Organizing to Bargain Campaign

December 2020 through February 2021 (Winter 2020 –'21)

| Categories                                                                    | DEC 2020                                                                                                                                                                      | JAN 2021                                                                                                                                                                                                                                       | FEB 2021                                                                                                                                                                                                                                                   |
|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Local Organizing – Lighthouse Locals</b>                                   |                                                                                                                                                                               |                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                            |
| Representation elections/Certification process for “Exclusive Bargaining Rep” | <p>Locals begin scheduling in possible dates/timelines for rep elections.</p> <p>Locals begin planning authorization card/petition strategies to certify majority status.</p> | <p>5 locals have scheduled rep elections on their organizing calendars or have planned for petitions/authorization cards to certify majority status.</p> <p>5 locals implementing actions to win rep elections or certify majority status.</p> | <p>5 additional locals have scheduled rep elections on their organizing calendars or have planned for petitions/authorization cards to certify majority status.</p> <p>10 locals implementing actions to win rep elections or certify majority status.</p> |
| School board resolution                                                       | <p>Work with other unions on elements of model ordinance/resolution.</p> <p>Research into composition of school boards in Lighthouse Locals is completed by Dec 15.</p>       | Work with other unions on elements of model ordinance/resolution.                                                                                                                                                                              | Final model resolution(s) drafted. If needed can be moved at VEA Convention in March.                                                                                                                                                                      |
| Organizing team/Expanded bargaining team                                      | <p>Teams continue to meet and add new members.</p> <p>Teams established in all lighthouse locals by Dec 15.</p>                                                               | Teams continue to meet and add new members.                                                                                                                                                                                                    | <p>Teams continue to meet and add new members.</p> <p>Teams are id’ing worksite leaders.</p>                                                                                                                                                               |
| Member engagement                                                             | Surveys and 1:1 meetings continue to surface issues and ID worksite leaders.                                                                                                  | <p>Locals organizing to win rep elections/certify majority status.</p> <p>Surveys and 1:1 meetings continue to surface issues and ID worksite leaders.</p>                                                                                     | <p>Locals organizing to win rep elections/certify majority status.</p> <p>Surveys and 1:1 meetings continue to surface issues and ID worksite leaders.</p>                                                                                                 |
| <b>Local Outreach -- Leadership &amp; List Locals</b>                         | All VEA locals assigned to one of three tiers.                                                                                                                                | Leadership locals meet to share plans.                                                                                                                                                                                                         | <p>List locals meet to share plans.</p> <p>Complete second round of local targeting.</p>                                                                                                                                                                   |

## VEA Organizing to Bargain Campaign

| Categories                                                         | DEC 2020                                                                                                                                                                                                                                                                                                                                                                                                              | JAN 2021                                                                                                                                                                  | FEB 2021                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                    | Cross check classification for each local. Final first draft for overall local targeting completed by December 10.                                                                                                                                                                                                                                                                                                    | Begin second draft of overall local targeting.                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Management and Governance of Organizing to Bargain Campaign</b> | <p>Monthly progress report submitted to VEA Exec Director.</p> <p>SOBC Action Task Force meets and develops recommendations to bring to VEA March '21 Convention.</p> <p>VEA BOD begins discussion of possible recommendations for foundational guidelines for bargaining to share with local elected leaders on such topics as bargaining for the common good, racial and economic justice, and open bargaining.</p> | <p>Monthly progress report submitted to VEA Exec Director.</p> <p>SOBC Action Task Force meets to develop and discuss draft recommendations for VEA 03/21 Convention.</p> | <p>Quarterly goals for Mar – May '21 submitted to VEA Exec Director.</p> <p>Monthly progress report submitted to VEA Exec Director.</p> <p>SOBC Action Task Force meets to determine recommendations for VEA 03/21 Convention.</p> <p>VEA BOD continues discussion of the foundational guideline recommendations for review by local leaders.</p> |
| <b>Data and Research</b>                                           | <p>Lists acquired, cleaned, and updated.</p> <p>Data flowchart drafted for review.</p> <p>Data base built for local organizing.</p>                                                                                                                                                                                                                                                                                   | <p>Lists acquired, cleaned, and updated.</p> <p>Data base built for local organizing.</p> <p>Data flowchart finalized.</p>                                                | <p>Lists acquired, cleaned, and updated.</p> <p>Data base built for local organizing.</p>                                                                                                                                                                                                                                                         |
| <b>Communications</b>                                              | <p>NEA Comms consultant works with lighthouse locals on internal member comms plans.</p> <p>Develop possible CB content for VEA and targeted locals' web pages and social media sites.</p>                                                                                                                                                                                                                            | <p>NEA Comms consultant works with lighthouse locals on internal member comms plans.</p> <p>Add and highlight CB content on VEA's and lighthouse locals' websites.</p>    | <p>NEA Comms consultant works with lighthouse locals on internal member comms plans.</p> <p>Update CB content on web and social media sites.</p>                                                                                                                                                                                                  |

## VEA Organizing to Bargain Campaign

| Categories                        | DEC 2020                                                                                                                                                                                                                                                                                  | JAN 2021                                                                                                                                                                                                                                                                                                                                          | FEB 2021                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Bargaining</b>                 | Lighthouse locals prepare to launch bargaining campaigns based on completed surveys and 1:1 meetings with members.                                                                                                                                                                        | Bargaining campaigns launched in 5 lighthouse locals based on issues/concerns members raised in surveys and 1:1 meetings.                                                                                                                                                                                                                         | Bargaining campaigns launched in an additional 10 lighthouse locals based on issues/concerns members raised in surveys and 1:1 meetings.                                                                                                                                                                                                      |
| <b>VEA Membership</b>             | <p>Integrate statewide comms effort with local membership organizing plans.</p> <p>VEA membership increases by ____.</p> <p>Extended Member Organizer program ends on Dec 15 in targeted locals.</p> <p>Plans underway for 2<sup>nd</sup> phase of Extended Member Organizer program.</p> | <p>Unite VEA members &amp; potential members around a vision of what collective bargaining can mean for educators and their students.</p> <p>VEA membership increases by ____.</p> <p>Work with USAC to coordinate membership goal and drives for the year.</p> <p>Recruitment for 2<sup>nd</sup> phase of Extended Member Organizer program.</p> | <p>Closely track membership numbers by worksite in Lighthouse Locals. Increase membership density for possible bargaining units in Lighthouse Locals to a minimum of 50% or other agreed on percentage.</p> <p>VEA membership increases by ____.</p> <p>2<sup>nd</sup> phase of Extended Member Organizer Program: February 8 - March 19.</p> |
| <b>Training</b>                   | <p>Organizing training for UD's held.</p> <p>Second Dr. Fedderman bargaining training for local leaders mid-December.</p> <p>Key decisions made/approved on May 1 Organizing to Bargain Conference</p>                                                                                    | <p>Third Dr. Fedderman bargaining training for local leaders held mid-January.</p> <p>May 1 OBC syllabus drafted – trainers lined up. Member engagement/local engagement goals established</p>                                                                                                                                                    | <p>Bargaining training for staff.</p> <p>Recruit trainers for May 1 conf.</p> <p>Promote May 1 Organizing to Bargain Conference to all locals.</p> <p>Collaborative Bargaining Summit held with teams from 15 locals attending.</p>                                                                                                           |
| <b>Staffing and Team Building</b> | Evaluate first phase of shared staffing/member organizers.                                                                                                                                                                                                                                | Recruit 2 <sup>nd</sup> round of shared staff and member organizers for Feb-Mar phase.                                                                                                                                                                                                                                                            | 2 <sup>nd</sup> round of shared staffing and member organizers begins.                                                                                                                                                                                                                                                                        |

## VEA Organizing to Bargain Campaign

| Categories                                        | DEC 2020                                                                                                                                                                                                                                                                               | JAN 2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | FEB 2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                   | <p>Establish firm dates and goals for 2<sup>nd</sup> phase.</p> <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p> | <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p>                                                                                                                                                                                                                                                                                                  |
| <b>Election 2020 and Legislative Session 2021</b> | <p>Election 2020 debrief held.</p> <p>Member engagement plans for legislative session developed. UD staff briefed on plans &amp; expectations, roles &amp; responsibilities.</p>                                                                                                       | <p>General Assembly Session begins on January 13, 2021</p> <p>Coalition work with sups and school boards to mitigate Covid-19 financial impact on public K-12 – especially in locals moving toward collaborative bargaining relationship.</p> <p>Determine key toss up Assembly districts – limit number to no more than 12 – based on past electoral performance.</p> <p>Increase local infrastructure (leaders and membership density) in 8 -12 Assembly districts rated as 2021 toss ups. Base organizing efforts in these districts on collective bargaining effort.</p> <p>Research begins on school board, county supervisor and city council races.</p> | <p>Coalition work with sups and school boards to mitigate Covid-19 financial impact on public K-12 – especially in locals moving toward collaborative bargaining relationship.</p> <p>Sine Die: General Assembly session ends on February 27, 2021.</p> <p>Begin worksite infrastructure organizing efforts in locals that include key toss-up Assembly seats. Tie organizing closely to efforts around collective bargaining.</p> <p>Research continues on school board, county supervisor and city council races.</p> |

## VEA Organizing to Bargain Campaign

| Categories | DEC 2020         | JAN 2021                                        | FEB 2021         |
|------------|------------------|-------------------------------------------------|------------------|
| Key Dates  | VEA BOD Meeting? | Legislative Session begins on January 13, 2021. | VEA BOD Meeting? |

## VEA Organizing to Bargain Campaign

## March 2021 through May 2021 (Spring 2021)

| Categories                                                                                       | MAR 2021                                                                                                                                                                                                                                        | APR 2021                                                                                                                                                                                                                                                                                               | MAY 2021                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Local Organizing – Lighthouse Locals</b>                                                      |                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                        |
| Representation elections/<br>Certification process for<br>Exclusive Bargaining<br>Representative | <p>5 locals have scheduled rep elections on their organizing calendars or have planned for petitions/authorization cards to certify majority status.</p> <p>15 locals implementing actions to win rep elections or certify majority status.</p> | <p>5 locals have scheduled rep elections on their organizing calendars or have planned for petitions/authorization cards to certify majority status.</p> <p>20 locals implementing actions to win rep elections or certify majority status.</p> <p>5 locals delay filing and move to Oct 1 filing.</p> | <p>5 locals have scheduled rep elections on their organizing calendars or have planned for petitions/authorization cards to certify majority status.</p> <p>15 locals implementing actions to win rep elections or certify majority status.</p> <p>5 additional locals delay filing until Oct 1.</p>   |
| School board resolution                                                                          | Model school board resolution reviewed with locals considering filing on May 1.                                                                                                                                                                 | Training provided to locals filing on May 1 – resolution process, lobby strategies and tactics.                                                                                                                                                                                                        | <p>May 1 (Saturday) – First day to formally file for a school board resolution.</p> <p>1<sup>st</sup> Round of Lighthouse Locals file for exclusive bargaining rep status – 15 Locals file.</p> <p>25 total Locals organizing to win rep elections/certify majority status in May or October 2021.</p> |
| Organizing team/Expanded bargaining team                                                         | <p>Bargaining Teams established in locals planning to file on May 1.</p> <p>Organizing teams from May 1 locals lobby school board.</p>                                                                                                          | <p>Organizing Teams expanded from May 1 locals, Contract Action Teams/Bargaining Support Teams created.</p> <p>Organizing teams from May 1 locals lobby school board.</p>                                                                                                                              | <p>Organizing teams from May 1 locals lobby school board and engage members in lobby efforts.</p> <p>Organizing Teams expanded from May 1 locals, Contract Action Teams/Bargaining Support Teams created and active in Locals.</p>                                                                     |



## VEA Organizing to Bargain Campaign

| Categories                                                  | MAR 2021                                                                                                                                                                                                                                                                                        | APR 2021                                                                                                                                                                                                                                                                                | MAY 2021                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Member engagement                                           | <p>Teams from Lighthouse Locals are encouraged to register for May 1 OBC Conf.</p> <p>Locals organizing to win rep elections/certify majority status.</p> <p>Surveys and 1:1 meetings continue to surface issues and ID worksite leaders.</p> <p>Locals launch straw votes to test support.</p> | <p>Teams from 20+ Lighthouse Locals are registered for May 1 OBC Conf.</p> <p>Locals organizing to win rep elections/certify majority status.</p> <p>Surveys and 1:1 meetings continue to surface issues and ID worksite leaders.</p> <p>Locals launch straw votes to test support.</p> | <p>More than 100 members participate in May 1 OBC Conf.</p> <p>Locals organizing to win rep elections/certify majority status.</p> <p>Members engaged in lobbying school boards in May 1 locals.</p> <p>Surveys and 1:1 meetings continue to surface issues and ID worksite leaders.</p> <p>Locals launch straw votes to test support.</p> |
| Local Outreach – Leadership & List locals                   | <p>Individuals and teams from Leadership and List locals are encouraged to register for May 1 OBC Conf.</p> <p>Tier review begins with goal of moving some locals into different tiers.</p>                                                                                                     | <p>Individuals and teams from 20 Leadership and List locals are registered for May 1 OBC Conf.</p> <p>Tier review continues – recommendations made on shifting locals among tiers and adding new locals.</p>                                                                            | <p>More than 40 members from leadership and list locals participate at May 1 OBC Conf.</p> <p>Reshuffle locals into tiers based on objective benchmark criteria, and new locals added to tiers.</p>                                                                                                                                        |
| Management and Governance of Organizing to Bargain Campaign | <p>V Monthly progress report submitted to VEA Exec Director.</p> <p>EA Convention prioritizes three-year collective bargaining campaign, funds Organizing to Bargain campaign, and sets aggressive membership goals</p>                                                                         | <p>Monthly progress report submitted to VEA Exec Director.</p> <p>SOBC ATF- meets.</p>                                                                                                                                                                                                  | <p>Quarterly goals for June '21– Aug '21 submitted to VEA Exec Director.</p> <p>Monthly progress report submitted to VEA Exec Director.</p> <p>SOBC Action Task Force members play visible role at May 1 OBC Conf., and evaluate success of Conf.</p>                                                                                      |

## VEA Organizing to Bargain Campaign

| Categories               | MAR 2021                                                                                                                                                                                                                                                                                                                                  | APR 2021                                                                                                                                                                   | MAY 2021                                                                                                                                                                                         |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Data and Research</b> | <p>Lists acquired, cleaned, updated.</p> <p>Data base built for local organizing.</p> <p>Tracking systems developed for use in rep elections/certification process.</p>                                                                                                                                                                   | <p>Lists acquired and cleaned, updated.</p> <p>Data base built for local organizing.</p> <p>Tracking systems developed for use in rep elections/certification process.</p> | <p>Lists acquired and cleaned, updated.</p> <p>Data base built for local organizing.</p> <p>Tracking systems being used in rep elections/certification process.</p>                              |
| <b>Communications</b>    | <p>Member/Potential Member and allies communications underway in lighthouse locals.</p>                                                                                                                                                                                                                                                   | <p>Member/Potential Member and allies communications underway in lighthouse locals.</p>                                                                                    | <p>Full coverage of May 1 conference and School Board Resolutions – media and internal member sites.</p> <p>Member/Potential Member and allies communications underway in lighthouse locals.</p> |
| <b>Bargaining</b>        | <p>Bargaining campaigns launched in an additional 10 lighthouse locals based on issues/concerns members raised in surveys and 1:1 meetings.</p> <p>Bargaining proposals developed and vetted by membership.</p> <p>Bargaining platforms developed, with membership approval at General Membership Meetings in locals filing on May 1.</p> | <p>Bargaining platforms developed, with membership approval at General Membership Meetings in locals filing on May 1.</p>                                                  | <p>Bargaining officially begins in locals.</p> <p>Bargaining platforms developed, with membership approval at General Membership Meetings in locals filing on May 1.</p>                         |
| <b>VEA Membership</b>    | <p>VEA Convention sets three-year membership goal to recoup membership loss of 11,720 members in previous decade.</p>                                                                                                                                                                                                                     | <p>VEA membership increases by ____.</p> <p>Recruitment begins for 3<sup>rd</sup> phase of Extended Member Organizer program.</p>                                          | <p>VEA membership increases by ____.</p> <p>3<sup>rd</sup> phase of Extended Member Organizer program begins on May 3 and ends on June 11.</p>                                                   |

## VEA Organizing to Bargain Campaign

| Categories                                             | MAR 2021                                                                                                                                                                                                               | APR 2021                                                                                                                                                                                                                                                                                                 | MAY 2021                                                                                                                                                                                                               |
|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                        | <p>2<sup>nd</sup> phase of Extended Member Organizer program ends on March 19.</p> <p>VEA membership increases by ____.</p> <p>Work with USAC to coordinate membership goal and drives for the year.</p>               |                                                                                                                                                                                                                                                                                                          | <p>Work with USAC to coordinate membership goal and drives for the year.</p>                                                                                                                                           |
| <b>Training</b>                                        | <p>May 1 OBC Conf – registration begins Monday, March 15</p>                                                                                                                                                           | <p>May 1 OBC Conf – Registration closes on Tuesday, April 20.<br/>Conference begins on Friday, April 30 with dinner (virtual) with guest speaker Dr. Jill Biden and 1st round of workshops.</p>                                                                                                          | <p>May 1 OBC Conf held.</p> <p>Follow-up activities underway.</p>                                                                                                                                                      |
| <b>Staffing and Team Building</b>                      | <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p> | <p>All day staff meeting to follow up on actions taken at the VEA Convention.</p> <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p> | <p>Hub and Spoke, Collective Bargaining and Membership Cadre staff meet.</p> <p>Organizing staff from NEA and temp organizers meet weekly with UniServ Manager and UniServ Director to update/coordinate campaign.</p> |
| <b>Election 2021 and Legislative Session 2021/2022</b> | <p>Continue infrastructure organizing efforts in locals that include key toss-up Assembly seats. Tie organizing closely to efforts around collective bargaining.</p>                                                   | <p>Continue infrastructure organizing efforts in locals that include key toss-up Assembly seats. Tie organizing closely to efforts around collective bargaining.</p> <p>Research report completed by April 29<sup>th</sup> on school board, county</p>                                                   | <p>Continue infrastructure organizing efforts in locals that include key toss-up Assembly seats. Tie organizing closely to efforts around collective bargaining.</p>                                                   |

## VEA Organizing to Bargain Campaign

| Categories       | MAR 2021                                                                        | APR 2021                                                                                           | MAY 2021                                                                                                    |
|------------------|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
|                  | Research identifies key school board, county supervisor and city council races. | supervisor and city council races. Separate report identifies key races for collective bargaining. |                                                                                                             |
| <b>Key Dates</b> | VEA Convention                                                                  | VEA BOD Meeting?                                                                                   | May 1 Organizing to Bargain Conference.<br><br>May 1 – Repeal of ban on collective bargaining takes effect. |

## VEA Authorization Process for Local Bargaining Units

Local EA Board & Rep Assembly Passes Internal Resolutions to support Collective Bargaining and sends "Notice of Intent to Bargain" to school board.

**Local EA**

- A. Local defines Bargaining Unit that will seek recognition
- B. Establishes internal structure to run card campaign and trains site leads
- C. Local does calculation via mapping activity to see how many cards they can get from their defined bargaining unit

Local EA begins to have building site leads circulate and get members and potential-members to sign authorization.

Must get a minimum 50%+1 of the bargaining unit

**LOCAL EA**

Local submits cards to school board triggering board process to determine exclusive bargaining rep under SB 939, Section C.

Division could demand a secret ballot election and/or contest unit composition

Once the cards are submitted, the division has 120 days to consider the request.

School Board can move a resolution, ignore, or reject the request.

LOCAL EA: Immediately host an emergency member meeting to demand neutrality and a third party counter  
(VEA or the Federal Mediation and Conciliation Services)

Continue to run cards

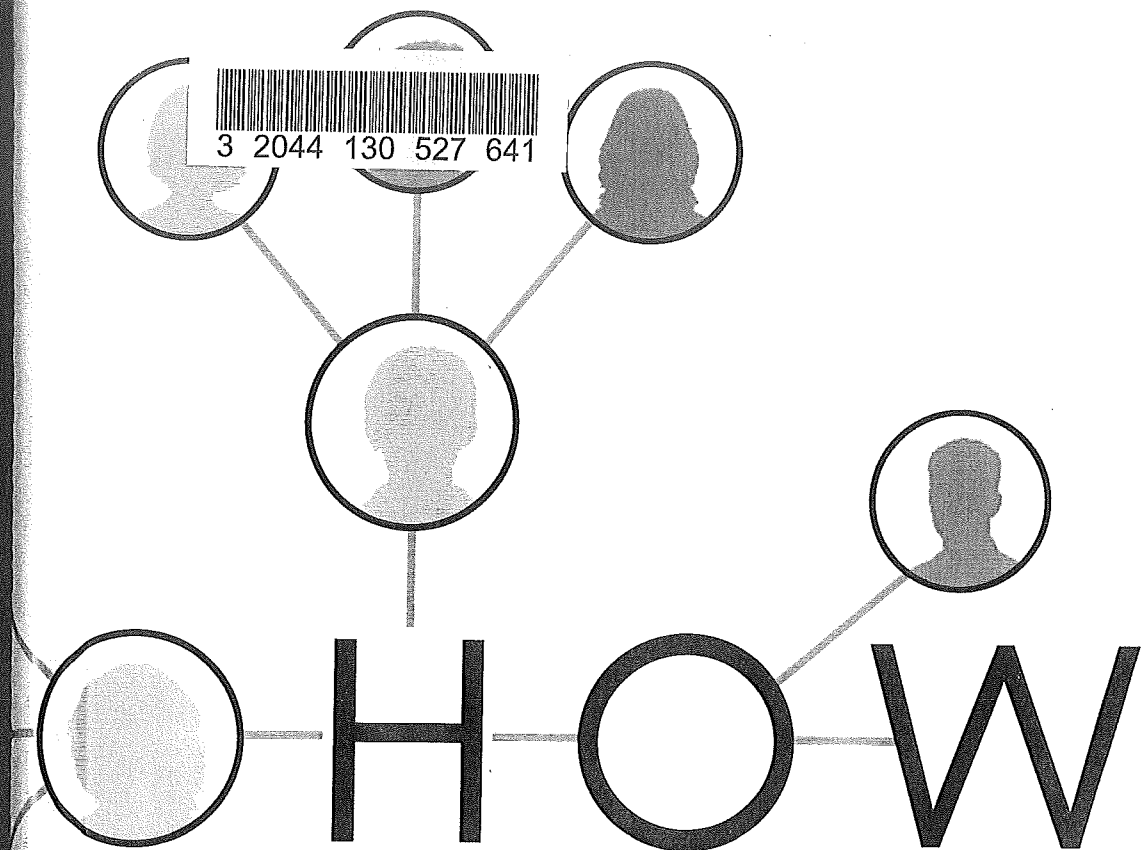
Local EA:  
School Board denies: GM decision to secure more cards.  
Host a member meeting once the cards are submitted to vote on a 60 day action plan to reconvene at the 60 day mark to authorize additional needed actions.

Local EA:  
School Board Approves – Begin Bargaining Process

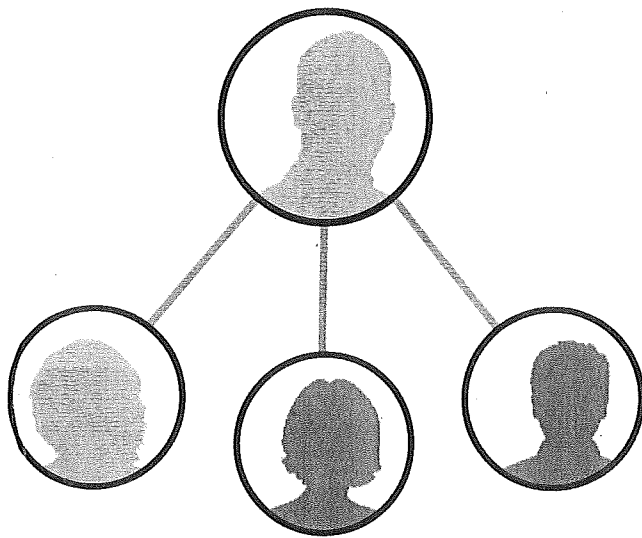
## Readiness to Bargain Tiers, Descriptors, and Focused Work

| Tiers                | Descriptors                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Names of Your Locals at Each Tier |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| 1. Lighthouse Locals | <p>Ready to Bargain – those EAs sufficiently organized and with enough authorization cards to consider filing for representation status in 2021; (75 to 85 % Ready)</p> <p>Readiness Metrics:</p> <ul style="list-style-type: none"> <li>Local has at least 40% or more membership in the designated bargaining unit and is ready (as defined by the local).</li> <li>Local believes that their School Board will reasonably engage in the Collective Bargaining process.</li> <li>Local have 75-80% of the building rep structures in worksite locations in place and ready.</li> <li>Local governance endorses Collective Bargaining via a signed resolution or commitment statement.</li> </ul> <p>Others?</p> <ul style="list-style-type: none"> <li></li> </ul> |                                   |
| 2. Leadership Locals | <p>Working on Bargaining Readiness – those EAs requiring additional infrastructure work</p> <p>Readiness Metrics:</p> <ul style="list-style-type: none"> <li>Three of the above four, in Tier One, are completed</li> </ul> <p>Others?</p> <ul style="list-style-type: none"> <li></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                   |
| 3. List Locals       | <p>Not Ready to Bargain – locals with low membership density and incomplete leadership structures.</p> <ul style="list-style-type: none"> <li>Two of the above four, in Tier One, are completed (Local governance endorsement must be one of the two completed)</li> </ul> <p>Others?</p> <ul style="list-style-type: none"> <li></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                         |                                   |
| 4. Latent Locals     | <p>Non Bargaining at This Time - local not organized and/or not interested</p> <p>Readiness Metrics:</p> <ul style="list-style-type: none"> <li>One or none of the above four, in Tier One, is completed; not interested</li> </ul> <p>Others?</p> <ul style="list-style-type: none"> <li></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                   |

|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>Tier 1 Local Names<br/>(Or worksites)</b> | <b>What is membership density? (Growth) What is leadership density? and How many well organized worksites do you have? (Strength)</b> | <b>What is the current narrative about the union in these locals?</b> | <b>How do you know your people? What are the values, interests, strengths, challenges?</b> | <b>What type of leadership structures exist in these locals?</b> |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
| <b>Tier 2 Local Names<br/>(Or worksites)</b> | <b>What is membership density? (Growth) What is leadership density? and How many well organized worksites do you have? (Strength)</b> | <b>What is the current narrative about the union in these locals?</b> | <b>How do you know your people? What are the values, interests, strengths, challenges?</b> | <b>What type of leadership structures exist in these locals?</b> |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
| <b>Tier 3 Local Names<br/>(Or worksites)</b> | <b>What is membership density? (Growth) What is leadership density? and How many well organized worksites do you have? (Strength)</b> | <b>What is the current narrative about the union in these locals?</b> | <b>How do you know your people? What are the values, interests, strengths, challenges?</b> | <b>What type of leadership structures exist in these locals?</b> |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
| <b>Tier 4 Local Names<br/>(Or worksites)</b> | <b>What is membership density? (Growth) What is leadership density? and How many well organized worksites do you have? (Strength)</b> | <b>What is the current narrative about the union in these locals?</b> | <b>How do you know your people? What are the values, interests, strengths, challenges?</b> | <b>What type of leadership structures exist in these locals?</b> |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |
|                                              |                                                                                                                                       |                                                                       |                                                                                            |                                                                  |



ORGANIZATIONS DEVELOP ACTIVISTS



CIVIC ASSOCIATIONS & LEADERSHIP IN THE 21ST CENTURY

HARRIE HAN



# Introduction

One chilly morning in November 2010, I met “Paul” in a crowded coffee shop to interview him about his work as an environmental activist.<sup>1</sup> As we were waiting in line for our drinks, Paul warned me that he may not have much to say. “I know you’re studying how to get people to do stuff,” Paul said. “I wish I knew,” he sighed. “We struggle with it every day.”

This book begins with a simple question: why are some civic associations better than others at “getting”—and keeping—people involved in activism? By signing petitions, donating money, attending meetings, making phone calls, and joining with others, activists power American democracy. Yet, the challenge of “get[ting] people to do stuff” (or, as some might say, cultivating people’s capacity for activism) is felt everywhere. From MoveOn.org to the National Rifle Association, Organizing for America to the Tea Party, from Health Care for America Now to the Sierra Club to local Parent-Teacher Organizations, membership-based civic associations constantly seek to engage people in civic and political action. What makes some more effective than others?

1. Throughout the book, the names of both individuals and organizations are disguised to maintain their anonymity. Interviewees from People for the Environment are given names that start with “P” while interviewees from the National Association of Doctors are given names that start with a “D.” I discuss this commitment to anonymity further in the appendix, which is dedicated to discussing the methodological approaches used in this study.

To answer this question, I spent two years comparing organizations with strong records of activism to those with weaker records. I observed their behavior and ran some field experiments with them. In doing so, I tried to get into the guts of the organizations, to understand what makes some better able to generate and sustain activism than others. Is it just about a charismatic leader, the communities where they work, or the people they recruit? Or maybe it is their messaging or their ability to target recruits. Or maybe it is none of these things at all and is just plain luck.

All of these factors matter. But I found, in the end, that what really differentiates the highly active associations is the way they transform their members' motivations and capacities for involvement. Just as Alexis de Tocqueville predicted 200 years ago, the associations with the most breadth and depth of activism act as "great free schools of democracy." By blending contemporary online and offline tools, these associations build breadth and depth of activism by developing citizens as democratic leaders and engaging people in collective action. In doing so, these associations help lay the foundation for a healthy democracy.<sup>2</sup>

What surprised me was how much these highly active associations struggled to maintain a focus on the transformational work of building democratic citizens. Cultivating, and transforming, people's motivations and capacities for activism—"get[ting] people to do stuff" more often and with more depth—is not easy. It takes precious time and resources to develop relationships with members, cultivate their motivations, and teach them the skills of democratic citizenship. Civic associations are most likely to do this work when it helps them build power. As Theda Skocpol writes, "Democratic [organizing] becomes the norm when would-be leaders can achieve power and influence only by drawing others into movements, associations, and political battles. Elites must have incentives to organize others."<sup>3</sup>

2. Many scholars have examined the importance of civic associations in laying the foundation for a healthy democracy. See Fung 2003 for a summary of that research, and, especially, Skocpol 2003; Putnam 2001.

Sometimes, contemporary political circumstances can create incentives for associations to abandon the long, patient work of leadership development. In the current environment, it can be tempting to short-circuit the process of developing activists by finding someone else who is already motivated and has the skills necessary for action. With the advent of new online technologies, big data, and analytics, finding these people—and getting to scale—is easier than ever before. Whereas getting a thousand signatures on a petition used to take weeks of pounding the pavement, now a well-crafted email to a targeted list can generate it in a matter of hours. Dramatic stories have been written about "viral engagements" such as Occupy Wall Street, the occupation of Tahrir Square in Egypt, the Susan G. Komen Foundation's decision to stop funding Planned Parenthood, and the shooting of Trayvon Martin in Sanford, Florida.<sup>4</sup> It seems like it is easier than ever to get people engaged in the twenty-first century, and the political process seems more open to citizen input. People power, perhaps, is on the rise.

Yet, many of the activists and associations I talked with have a vague unease that all this activity is not adding up to something bigger. To these observers, American democracy seems broken. People "do stuff" but problems persist. Widening gaps along income, social class, political ideology, race, religion, and other dimensions fragment our society.<sup>5</sup> Approval ratings of government plummet as political institutions fail to address the everyday problems people face.<sup>6</sup> Associations can get more people to engage in certain kinds of activism more easily than before, but many feel like they still lack the power they need to address fundamental problems of today's society. These activists and associations persistently questioned themselves: what can we do to develop the quantity and quality of activism we need to win the victories we want?

4. Fung and Shkabatur 2012.

5. See, for instance, Schlozman, Verba, and Brady 2012 for a discussion of rising inequalities and Brady and Nivola 2007 for a discussion of increasing polarization.

6. See Hibbing and Theiss-Morse 2001 and Hetherington 2005 for a discussion of declining trust over time.

That is why I wrote this book. Getting people involved in collective action is just one part of what civic associations do to build power—but it is fundamental. Models for how to engage people in activism, however, are not necessarily transparent in today's complex political environment. Providing these models is fundamental to helping these associations build the power they want and also to supporting our democracy. This book, thus, shows how organizations that combined transformational organizing with transactional mobilizing were able to achieve higher levels of activism over time.

Sometimes called “engagement organizing,” “distributed organizing,” or, in certain contexts, “integrated voter engagement,” this blend of mobilizing and organizing helps civic associations build quality and quantity—or depth and breadth—of activism. To build power, civic associations need lots of people to take action and also a cadre of leaders to develop and execute that activity. They need individuals who take action but also a community that learns together how to translate that action into power. This is not a simple story about the power of offline versus online organizing. Instead, it is a story about how associations can blend both online and offline strategies to build their activist base. Associations face a constant tension between investing in membership and investing in members. Investing in membership helps build breadth, but investing in members helps build depth. I argue that associations do not have to choose between investing in members and investing in membership. They can do both. By investing in their members, they build the capacity they need to build their membership. This book describes how.

## STUDY DESIGN

Figuring out what distinguishes associations that are good at generating and sustaining activism is no easy task. So many factors affect an association's ability to get people involved. Luckily, many scholars have come before me—because civic associations have long played an important role in American public life. According to the Washington Representatives Study, individual-based associations constitute 11.9 percent of the 12,000

organizations listed in the *Washington Representatives directory*.<sup>7</sup> These associations differentiate themselves from other types of organizations because they (a) make claims in the public arena, (b) depend on the voluntary actions of individual members, and (c) govern themselves through elected members.<sup>8</sup> Commonly referred to as citizen groups, these associations are often disproportionately prominent actors in political debates.<sup>9</sup> Part of what all of these associations do to build power is engage activists. Given the importance of this activism in the political process, lots of people have studied it. From studies of political participation, interest groups, social movements, and civic engagement, we already know a lot about what factors influence activism.<sup>10</sup>

We know, for instance, that the kinds of people associations attract (individual characteristics) and where the associations work (community characteristics) matter. To participate, a person must have the resources to do so (free time, civic skills, knowledge, and such) and they must want to participate.<sup>11</sup> Location also matters.<sup>12</sup> Civic associations located in areas

7. Schlozman, Verba, and Brady 2012.

8. See Knoke 1986; Andrews and Edwards 2004 for a discussion of the unique features of civic associations. Their reliance on voluntary action by members means that leaders must find ways to generate commitment instead of compliance, thus differentiating themselves from organizations that rely on paid employees and have more centralized bureaucracies (Kanter 1972).

9. According to the findings of Baumgartner et al. 2009, these civic associations are “the most frequently cited type of major participant in these policy debates” (9) and “may spend less on lobbying and lobby on fewer issues than business organizations, but when they do lobby, they are more likely to be considered an important actor in the policy dispute” (11, see also figure 1.1 on p. 13).

10. See, for instance, Klandermans and Oegema 1987; Rosenstone and Hansen 1993; Verba, Schlozman, and Brady 1995; Teske 1997b; Baumgartner and Leach 1998; Wilson and Musick 1999; Gerber and Green 2000; Polletta and Jasper 2001; Green and Gerber 2004, 2008; Schussman and Soule 2005; Beyerlein and Hipp 2006; Nickerson 2006; Arceneaux 2007; Klandermans 2007; Gerber, Green, and Larimer 2008; Musick and Wilson 2008; Munson 2009; Andrews et al. 2010; Dorius and McCarthy 2011; Eliasoph 2011; Garcia-Bedolla and Michelson 2012; Bimber, Flanagan, and Stohl 2012; Corrigan-Brown 2012; Karpf 2012; Kreiss 2012; Rogers, Gerber, and Fox 2012; Baggetta, Han, and Andrews 2013; and others.

11. Verba, Schlozman, and Brady 1995; Schlozman 2003.

12. Wandersman et al. 1987; Sampson, Morenoff, and Gannon-Rowley 2002; Zeldin and Topitzes 2002.

like San Francisco with an active, ideologically charged community can be better off than associations working in other areas.<sup>13</sup> Finally, the issue context can make a difference. Political opportunities can open up, for example, when issues become the subject of national attention through a major focusing event like Hurricane Katrina or a school shooting.

My study focuses on organizational factors—what an association can do to cultivate activism. A growing body of research reconceptualizes the choice to get involved in politics not as an individualized choice, but as one embedded in the complex social interactions people have.<sup>14</sup> Thinking about the choice this way raises the question about organizational factors: how can associations create the conditions that make it more likely people will take action? Many scholars have studied the different ways associations can frame their message, create incentives for people to participate, build targeted lists, and use other tactics for generating activism.<sup>15</sup> But we still lack a textured sense of how all of these tactics, when put together into a broader strategy for engagement, succeeds (or fails) in cultivating activism.

To examine this, I set up a two-phase study that tried to isolate the effect of organizational factors by combining observational and experimental data. The first phase consists of two-year, comparative case studies. In these case studies, I identified matched pairs of civic associations that were working on similar issues in similar communities and recruiting similar kinds of people—but differed in the levels of activism they inspired. If two associations are working on the same issue in the same kind of community and drawing the same kind of people, why is one more effective than the other at engaging people in action? I drew on surveys, interviews, and ethnographic observations to investigate this

13. Putnam 1995, 2000.

14. Garcia-Bedolla and Michelson 2012; Rogers, Gerber, and Fox 2012.

15. On framing, see Snow and Benford 1988; Snow 2007. On incentives for participation, see Wilson 1973; Miller 2005. On targeting, see Issenberg 2012; Kreiss 2012. For more on the way organizational contexts can affect participation, see summaries in Polletta and Jasper 2001, Snow, Soule, and Kriesi 2007, and Orum and Dale 2009.

question. Then, from this first phase, I identified key differences in what the high- and low-engagement local organizations did.<sup>16</sup>

I drew all of my matched pairs from two national associations that I am calling People for the Environment and the National Association of Doctors.<sup>17</sup> People for the Environment tries to get citizens engaged around environmental issues, and the National Association of Doctors seeks to get doctors and medical students involved in advocating for health reform. Both associations typify many of the characteristics common to modern civic associations. They have clear advocacy goals they are trying to achieve, they build power by engaging volunteers in activity, they govern themselves through elected leadership, and they operate at the national, state, and local levels. In addition, their local chapters operate relatively autonomously, such that we can examine variation in the local chapters to understand why some chapters are better than others at engaging people in activity, even though they operate within a common national framework. Each matched pair in my study consisted of local chapters working within the same national association. In total, I observed six pairs of local chapters in two national associations (twelve chapters total, six in each association).

The second phase of the project, the field experiments, built on hypotheses generated in the first phase to test their effectiveness in the context of online mobilization. Ultimately, to uncover causal relationships between actions an association takes and individual involvement, we need to test the effectiveness of different organizational interventions. These experiments examined how organizational actions affected the individual choice to take action.

Many more details on the research design are needed to fully understand the process I used to develop the arguments offered here. Together, chapter 2 and the appendix present those details—on everything from

16. As discussed in more detail in chapter 2, I define “high-engagement” organizations as those that historically have high rates of activism, while “low-engagement” organizations are those that historically have low rates of activism.

17. In undertaking the study with these associations, I agreed to preserve their anonymity. The choice to do so is discussed further in the appendix. In addition, I describe both associations more fully there.

the research design, to the two national associations that were the subject of study, to the implications of studying associations working on health and environmental issues, to the way I define activism, and the way I incorporate previous research. Here, let us get on to what I found.

## MODELS OF ENGAGEMENT: LONE WOLVES, MOBILIZERS, AND ORGANIZERS

So what distinguished the high-engagement chapters who had strong historical records of engaging activists? The key distinction is that the high-engagement chapters combine some form of transformational *organizing* with transactional *mobilizing*. Organizers invest in developing the capacities of people to engage with others in activism and become leaders. Mobilizers focus on maximizing the number of people involved without developing their capacity for civic action. The high-engagement chapters did both. Low-engagement chapters either acted as *lone wolves* or focused solely on mobilizing. People often confuse mobilizing with organizing, but as this book will argue, they are quite different. When mobilizing, civic associations do not try to cultivate the civic skills, motivations, or capacities of the people they are mobilizing. Instead, they focus on maximizing numbers by activating people who already have some latent interest. Organizers, in contrast, try to transform the capacity of their members to be activists and leaders. The chapters with the highest levels of engagement in the study did both.

Associations, just like people, act with implicit theories of change in mind. A theory of change is a set of assumptions about what kinds of actions will produce desired outcomes. Some associations believe, for instance, that the best way to get people involved is to make it as easy as possible. Others believe that it is more important to give volunteers real responsibility, however complicated it may be. These, and other beliefs, come together to form a theory of how the association will achieve its goals.

In my research, the association leaders I spoke with identified three different theories of change, which translated into three different models of engagement: lone wolves, mobilizers, and organizers (the terms are taken from our interviews). Each model of engagement, described in table 1-1,

Table 1-1 COMPARISON OF LONE WOLF, MOBILIZING, AND ORGANIZING MODELS

|                                                   | High-Engagement Sites<br>Combined These Strategies                                                | Low-Engagement Sites<br>Combined These Strategies                                                                   | LONE WOLVES                                                                                                                                        | MOBILIZERS                                                                                                                                         | ORGANIZERS                                                                                                                    |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Strategy for building power                       | Build power through information                                                                   | Build power by building membership; take people where they are                                                      | Build power by building leadership; transform motivations and capacities of members to take on more leadership                                     | Build membership by getting as many people as possible to take actions; build a bigger, more targeted prospect list                                | Build membership by developing leaders who can engage others; constantly develop leadership among new prospects               |
| Strategy for building membership                  | N/A                                                                                               | Build membership by getting as many people as possible to take actions; build a bigger, more targeted prospect list | Choose advocacy strategies that require quick engagement by lots of people (i.e. petitions); focus on reacting to timely events that engage people | Choose advocacy strategies that require quick engagement by lots of people (i.e. petitions); focus on reacting to timely events that engage people | Choose advocacy strategies that build people's engagement over time; focus on campaigns that sequence actions people can take |
| Implications for advocacy                         | Choose advocacy strategies that can be done without many people (i.e. writing comments, research) | Centralize responsibility in the hands of staff or a few key volunteers                                             | Centralize responsibility in the hands of staff or a few key volunteers                                                                            | Centralize responsibility in the hands of staff or a few key volunteers                                                                            | Distribute responsibility out to a large network of volunteers                                                                |
| Implications for structure                        | Centralize responsibility in the hands of staff or a few key volunteers                           | Centralize responsibility in the hands of staff or a few key volunteers                                             | Centralize responsibility in the hands of staff or a few key volunteers                                                                            | Centralize responsibility in the hands of staff or a few key volunteers                                                                            | Distribute responsibility out to a large network of volunteers                                                                |
| Implications for types of asks made to volunteers | N/A                                                                                               | Focus on discrete requests that often allow people to act quickly and alone                                         | Focus on independent asks that are often more time-intensive; force people to work with others, and give them some strategic autonomy              | Focus on reaching out to as many people as possible by developing attractive "pitches" that will draw in the most people and new networks          | Focus on reaching out to people by building relationships and community with them                                             |
| Implications for communications with volunteers   | Provide information and updates to interested people                                              | Minimal resources needed for training and reflection                                                                | Minimal resources needed for training and reflection                                                                                               | Minimal resources needed for training and reflection                                                                                               | Need extensive resources for training, coaching, and reflection                                                               |
| Implications for support                          | Minimal resources needed for training and reflection                                              | Minimal resources needed for training and reflection                                                                | Minimal resources needed for training and reflection                                                                                               | Minimal resources needed for training and reflection                                                                                               | Need extensive resources for training, coaching, and reflection                                                               |

begins with a basic assumption about how to build power. This assumption drives subsequent choices listed in the table. Lone wolves choose to build power by leveraging information—through legal briefs, public comments, and other forms of research advocacy. Mobilizers and organizers, by contrast, choose to build power through people. Organizers distinguish themselves from mobilizers, however, because they try to transform the motivations and capacities of their members to cultivate greater activism. As Joy Cushman, the Campaign Director for PICO (a national network of faith-based community organizations) put it, “The organizer thus makes two [strategic] choices: 1) to engage others, and 2) to invest in their development. The mobilizer only makes the first choice. And the lone wolf makes neither.”<sup>18</sup>

### Lone Wolves

Peggy, for instance, is a long-time volunteer with People for the Environment and belongs to a chapter that is full of lone wolves. She initially got involved with People for the Environment because she was concerned about degradation of her local forest. When she first joined, she found that most of the other volunteers worked alone. So Peggy did the same thing. Over the years, she has developed an enormous body of knowledge about both the science of forest preservation and how the decision-making bodies relevant to protecting her local forest work—how and when they take public comment, what kinds of comments are most effective, how to participate effectively in the comment process, and so on. She devotes an enormous amount of time to this work, keeping abreast of policy developments, writing comments, attending hearings, and learning about the science and available policy alternatives. She is what other local leaders in People for the Environment call a “star volunteer,” so her local chapter has given her responsibility for all forest protection work in their area. When asked what she has done to recruit volunteers to People

for the Environment, however, she replied, “I’m so busy, I’m not doing anything and never have.”

Lone wolves like Peggy do not put effort into engaging others. They choose advocacy strategies that do not require them to engage others and focus instead on building power by becoming an accurate source of information and expertise for decision-makers.<sup>19</sup> As exemplified by Peggy, they often do this because they do not have the resources to engage large numbers of people in their work, or they do not think it is important. Because they are part of membership-based associations, they still have to keep others updated, but they do so by providing others with information and updates about their work.

### Mobilizers

Mobilizers build power by focusing on transactional outcomes like building the association’s membership. They try to get as many people involved as possible, but they do not try to transform or cultivate volunteers’ capacities for further activism. Instead, they take people where they are. Some people may act only once, and some may become involved over the long term. Some people may want to devote only a discrete amount of time to the association, while others may want to take responsibility for outcomes or become leaders. Mobilizers let people self-select the level of activism they want. To get enough people to accomplish their goals, mobilizers try to build the biggest, most targeted list possible, to maximize the chances they will find people poised for action.

David, for example, is a volunteer leader within the National Association of Doctors. He works with an informal group of about five doctors that initiates and carries out any strategic undertaking for the National Association of Doctors in its community. David and his team spent considerable time building their online presence through email, blogging, and social media. This online work has helped them amass

18. Personal communication, August 11, 2013.

19. Hansen 1991; Smith 1995.

a rather long list of doctors who may be interested in the events and activities of the National Association of Doctors. In addition, they have developed partnerships with other progressive organizations such as the local Democratic Party, MoveOn, some unions, and other organizations. Putting those lists together with their own, they can reach a relatively wide audience to publicize upcoming events and activities for the National Association of Doctors. Once people are on the list, they send them information and a menu of opportunities for participation, and people self-select into actions they want to take.

Depending on the activity, David may get very robust or very low rates of participation. The more attractive his asks can be—such as if they are responsive to timely or controversial events in the news—the more likely he is to engage more people. In one instance, he wanted people to sign a petition and was able to generate hundreds of signatures online. In another instance, he tried to get doctors to attend an event he had organized with a speaker, and only two people showed up. When asked what works to engage people in action, he said, “Well, I keep pestering them. I send many emails and keep pestering basically.” When asked how he followed up with the two people who showed up, David said, “Well, I didn’t really talk to them, so I’m not sure who they are.”

Because of the sheer number of events and activities they plan, David and his team engage a number of people in activity over time, but all of the responsibility for this work sits on their shoulders. When they cannot generate enough response to a request for action, they try to cast a bigger net. They try to search for and identify people who are poised for action. The bigger and more targeted their prospect pool, and the more responsive their asks can be to events in the news, the more likely they are to find larger numbers of people poised to respond to their requests for action.

### Organizers

Phil’s chapter in People for the Environment, by contrast, is full of organizers. When Phil first became a volunteer leader within People for the

Environment, he was given responsibility for organizing a certain geographic area in his state. Almost immediately, Phil realized that the area was too large for him to organize on his own. Other leaders within his state encouraged him to recruit other volunteers to help him organize his area and gave him some names of people to contact. Phil divided his area up into three sections and kept talking to people in those areas until he found three people who were willing to take responsibility for organizing each one. Then, he trained them in how to do their work, mimicking the training he had received when he first joined. Two of those leaders have recruited their own teams of people to help them, while one works alone. Now, Phil continues to meet with each of these three leaders on a weekly basis to check in about their work and to coach them in meeting their weekly goals. In describing this work, Phil says,

[The three leaders and I had] talked about running this regional conference together.... For about a month [after we had the idea], I would have weekly calls with these three individuals around putting together the structure of how volunteers would run this conference—because we didn’t have any funding.... It was their vision and their genius, and I was just kind of along for the ride with them, to help them create this structure and then recruit people. So they were the steering committee, and they recruited like eight of their friends, who they thought would each do a great job for their subcommittees. Those eight people joined the steering committee. And then the subcommittees, the chairs were responsible for recruiting for their committees. [There was a subcommittee on] conference content, fundraising, action, media, I can’t remember the others, you know. Pretty soon, we had an active group of about 100 people working on developing this conference.

Phil and his team distribute responsibility for getting people involved across a number of leaders. His distributed leadership strategy depends on developing a subset of people as civic leaders and engaging them in collective action. Those leaders are invested with real responsibility, and Phil supports them in that work. Because he expects them to achieve certain outcomes, he also provides training and coaching to help them develop the skills and capacities they need to reach their goals. Engaging others in activism, then, depends not only on Phil, but on the network of



leaders that he supports. Phil builds power by investing in the leadership skills of his activists and creating greater collective capacity by increasing the numbers of people responsible for engaging others in action. When Phil cultivates more leaders, Phil's chapter gains greater capacity to build power by engaging others in deeper ways.

### COMPARING MOBILIZING AND ORGANIZING

Many scholars and practitioners confuse mobilizing and organizing. Lone wolf strategies are the most distinct because they do not focus on building power through people. The confusion between mobilizing and organizing arises, in part, because mobilizing and organizing are not mutually exclusive strategies. The local chapters with the highest rates of activism in this study did both. Not only are these local chapters able to mobilize large groups of people to take quick action, they also cultivate a group of people to become leaders. Nonetheless, distinguishing between these models of engagement is important for understanding how high-engagement sites attain their levels of engagement.

A core distinction of organizing is that it has the potential to be transformational in a way that other strategies do not. As Tocqueville argued in his observations of civic life in America in the 1830s, organizers bring individuals together in a way that creates a collective capacity not present when individuals act alone. Organizers do not simply aggregate individuals but also create new relationships between them that generate new commitments and resources.<sup>20</sup> Mark Warren described this phenomenon in his analysis of the Industrial Areas Foundation (IAF), a nationwide interfaith network of community organizers. "Those leaders who become and remain primary leaders in the organization . . . speak of their participation in the IAF and its leadership development process as a transformative experience. They stay involved because they develop a 'self-interest' in personal growth and their newly won power."<sup>21</sup> Becoming a leader is a

20. Ganz 2009, 2010.

21. Warren 2001, 217.

transformative experience for activists within IAF, who reported developing a sense of personal agency that they previously lacked. Their work through IAF taught them that they could make a difference. By helping individuals discover and cultivate this sense of agency, the IAF organized them, pushing them in directions they might not have gone on their own.

Mobilizers, in contrast, do not seek to transform people's interests as they recruit them for action. They are focused instead on building their membership base—with more people on their list, they have a higher probability that more people can be activated for any given action. At any given time, some people are not ready to get involved while others are poised for action. People can be poised for action for a variety of reasons—perhaps they have a personal interest in health or environmental issues, or their interest was piqued by a news story they read, or they have a friend who is urging them to get involved, or they have some free time they are looking to fill.<sup>22</sup> Others may not be ready—because they are too busy, have other issues they care about more, or do not feel like their actions will make a difference. Mobilizers allow people to self-select the level of activism they desire.

Structurally, the work of mobilizing is usually centralized in the hands of a few leaders, while the work of organizing is distributed through a larger network of leaders. The primary goal of mobilizing is to generate transactional outcomes, such as large numbers of participants. Responsibility is often centralized in a group of people who seek to identify potential opportunities for participation and circulate it to an ever-widening group of potential activists. When there is a ready pool of people who can be easily activated because they have been primed by the media or by other events, mobilizing alone can sometimes achieve the transactional outcomes an association desires. Often, however, to reach its transactional goals at scale, an association needs a cadre of leaders who have the motivations, skills, and capacities to mobilize others. This cadre is developed through a distributed organizing structure. By focusing

22. See McAdam 1986 and Munson 2009 for a discussion about the importance of "biographical availability" in determining people's readiness for action.



instead on creating opportunities for participation that are as appealing as possible and then advertising (or marketing) those opportunities to as wide a list as possible.

Finally, because organizers want to develop people's ability to take responsibility, they focus on extensive training, coaching, and reflection, while mobilizers do not. Although both mobilizers and organizers may use outside strategies that depend on grassroots engagement for success, the ways in which they engage the grassroots are very different. Organizers make distinct choices about which activists they want to nurture as leaders, how to structure and develop relationships with activists and between them, how to cultivate the motivation and interests of potential activists and leaders, how to equip them with the skills they need to become leaders, and how to bring people together to engage in collective action.

Mobilizing and organizing are mutually reinforcing approaches. Mobilizing helps develop a prospect pool or "leads list" that can be used to identify potential leaders. Organizing can enable the work of mobilizing by developing high-quality leaders capable of recruiting future activists. To meet the challenges of building power, civic associations need to go broad in their mobilizing and deep in their organizing. The high-engagement chapters in this study, thus, did both.

## PUTTING ORGANIZING AND MOBILIZING IN HISTORICAL CONTEXT: ONLINE VERSUS OFFLINE ACTIVITY

It is tempting to differentiate mobilizing and organizing strategies based on whether they are online or offline techniques. Online techniques lend themselves easily to mobilizing because they make targeting and list-building much easier and more efficient than before. Associations can build much larger and more targeted prospect pools with online technology than with traditional organizing strategies. The work of building relationships, fostering community, and creating interdependent work, in contrast, seems to depend largely on offline interactions. Indeed, much of the previous research on the organizational

on the transformational work of building long-term capacity, organizers build up the people-based "assets" of the association. The leaders that organizers cultivate recruit future activists and leaders. The more responsibility is distributed to a wider network of organizers, the more capacity the association has for mobilizing.

Because organizers seek to cultivate and transform people's interests, they make different decisions from mobilizers about how to engage people in action (as outlined in table 1-1). First, organizers make requests for action that bring people into contact with each other and give them space to exercise their strategic autonomy. Research shows that it is through relationships and autonomous collective action that people's motivations for action are likely to change, grow, and develop.<sup>23</sup> Working with other people to strategize and take action is often challenging, however, because it requires more time and coordination than working alone. Mobilizers thus tend to focus on discrete, easy requests that allow people to act alone. Because mobilizers are not worried about cultivating people's motivations, they are less concerned with bringing people into contact with each other or giving them any strategic autonomy.

Second, and relatedly, organizers focus on building relationships and community through interdependent (as opposed to individual) action. The idea is that people's motivation for action and potential for learning becomes centered on the relationships they have with other people in the association.<sup>24</sup> James Q. Wilson argued that people have three different types of motivations for getting involved in political organizations: purposive, solidary, and material. Purposive motivations have to do with wanting to achieve particular policy goals. Solidary motivations are social and relational. Material motivations have to do with personal gain. Mobilizers appeal mostly to purposive motivations, while organizers try to appeal to all three, especially solidary ones. Mobilizers do not forge strong enough relationships with the people they are trying to engage to be able to use the relationships as a source of motivation. They focus

23. See Damasio 1994; Marcus, Neuman, and MacKuen 2000; Nussbaum 2001 for more on the neurological basis of these findings.

24. Wilson 1973; Warren 2001.

roots of activism focused on the importance of face-to-face activity and the creation of strong collective identities.<sup>25</sup> In fact, a robust debate has emerged about whether or not online tools can be effective vehicles for collective action. Critics of the new forms of political activity have argued that their focus on quick and easy tasks amounts to nothing more than mere “clicktivism,” or worse yet, “slacktivism,” replacing meaningful political action with shallow tasks.<sup>26</sup> As Malcolm Gladwell famously wrote in his critique of online activism, “the revolution will not be Tweeted.”<sup>27</sup>

Simply equating mobilizing with online techniques and organizing with offline techniques would be a mistake, however. I argue that the important distinction between mobilizing and organizing is not whether the tools used are online or not. Both online and offline tools can be used effectively to mobilize and organize. Likewise, online and offline tools can be used ineffectively to mobilize and organize. As Bimber, Flanigan, and Stohl argue, debating whether specific technologies are able to do the kind of capacity building required for organizing is not useful because the technologies are changing so quickly.<sup>28</sup> While video-conferencing tools that were readily available to civic associations a few years ago were not able to foster the online collaboration needed in some forms of organizing, now they are much improved, much more accessible, and are only likely to get better. The question is not whether online or offline tools are better for organizing, but instead how changing technologies affect the landscape in which modern civic associations do their work.

Patterns of collective action have shifted throughout American history as the social, political, technological, and historical context has shifted. Democracy in America has never been a spectator sport. From the nation’s founding, people have been joining together to make their voices heard in the political process. As Theda Skocpol ably documents, from

25. For summaries, see Polletta and Jasper 2001; Snow, Soule, and Kriesi 2007; Snow and Soule 2010.

26. e.g. Morozov 2009.

27. Gladwell 2010.

28. Bimber, Flanigan, and Stohl 2012.

the mid-nineteenth to the mid-twentieth century, much of this activity was organized through large, federated civic associations that spanned social classes. In these associations, “organizers [organized] organizers.”<sup>29</sup> These organizers were “civically ambitious” who built national associations anchored in vision and power aspirations” who built national associations anchored in vibrant local chapters that worked together to “support [expansive] public social programs.”<sup>30</sup>

This pattern of association activism changed, however, in the 1960s and 1970s with the advent of direct mail, the professionalization of movement organizations in the United States, and the fragmentation of associations based on social cleavages like race and gender. The advent of mass media—through television, direct mail, and such—in political communications allowed civic associations, for the first time, to communicate with members on a large scale. This change reduced incentives for organizing. As Skocpol writes, “[I]f mass adherents [can be] recruited through the mail, why hold meetings?”<sup>31</sup> More and more members of civic associations became “checkbook members,” contributing a modest amount each year to maintain their membership but otherwise not participating in the organization in any way.<sup>32</sup> Associations that focused exclusively on mobilizing began to emerge.

The online revolution in the early 2000s has led to even more changes. Information now flows instantaneously, allowing associations to activate participation much more quickly than in the past. Associations that once relied on phone calls and monthly newsletters mailed to their members can now communicate instantaneously and interactively with members and supporters through a number of different mediums. Some scholars argue that the very structure of participation has changed, because individuals with computers no longer have to rely on large associations to organize their collective action, which has altered the way people think

29. Skocpol 2003, 89.

30. Skocpol 2003, 73.

31. Skocpol 2003, 210.

32. Berry 1999; Schier 2000; Skocpol 2003.

about membership in civic associations.<sup>33</sup> Associations now structure work and action around constantly shifting events and activities instead of long-standing associational rituals and programs.<sup>34</sup> Copious amounts of new data have become available to associations, allowing them to get immediate feedback on their outreach strategies and target their work far more effectively than before.<sup>35</sup> With all of these changes, participation has taken new forms. Many civic associations, like MoveOn.org, for example, rely primarily on Internet technologies, which has forced older civic associations, like the League of Women Voters, to adapt.

Just as the advent of mass media in the 1960s changed the context for political activism, so did the evolution of mass online communication. As the landscape of collective action changes with new technologies, the incentives for civic associations to engage in organizing change also. Online tools make the work of mobilizing much cheaper than before and allow associations to create bigger and more targeted prospect pools. This may enable some associations to reach their transactional goals for the number of people they want to engage in action without ever doing any organizing. In other words, with the ability to reach a bigger prospect pool that is more likely to take action because it is better targeted, associations may be able to get the number of signatures they need on a petition or the number of people they want at an event without having to invest in pushing people up the activist ladder. Thus, many associations first taking advantage of mass online communication have focused on mobilizing.

Whether this is a durable long-term strategy for the association still remains to be seen. Some, like Zeynep Tufekci, argue that focusing solely on digital mobilizing might “paradoxically... [engender] hindrances to movement impacts... related to policy and electoral spheres.”<sup>36</sup> These hindrances emerge, Tufekci argues, because the ability of digital tools to reduce the costs of coordination and communication also means

33. Bennett 2012; Bimber, Flanagan, and Stohl 2012; Karpf 2012; Mele 2013.

34. Karpf 2012.

35. Issenberg 2012; Kreiss 2012.

36. Tufekci 2014.

that associations relying on them are never forced to create leadership structures that later enable them to exercise power. They achieve their transactional goals, in other words, without ever engaging in the transformational work of organizing. Associations like MoveOn, which were at the vanguard of using online tools to mobilize people for action,<sup>37</sup> have begun to realize the limits of transaction without transformation. Mobilizing by itself can work if an association does not need to engage large numbers of people very consistently or does not need them to engage in very intensive activism, or if it has other sources of power other than people power. In that case, mobilizing may be a cheap and effective strategy to reach transactional engagement outcomes. For associations that do not have large prospect pools, that need people to engage in acts that require more time or risk, or that depend consistently on people to maintain power, mobilizing strategies alone may be of limited efficacy.

Given some of the limitations of mobilizing alone, a newer model of engagement, sometimes called “engagement organizing” or “distributed organizing,” that blends mobilizing and organizing began to emerge near the end of the first decade of the twenty-first century. In 2006–2007, MoveOn stopped relying exclusively on its online mobilizing model and shifted toward developing local offline “Leadership Councils” and other structures to enhance their organizing ability. Similarly, in 2007–2008, the campaign to elect Barack Obama president developed a model of blending online and offline organizing and mobilizing.<sup>38</sup> The shift in the strategies employed by MoveOn and the Obama campaign, as well as other developments, demonstrated the power that civic associations can create by blending online and offline mobilizing and organizing. Many of the most vibrant civic associations working online today, as a result, are exploring ways of organizing using online tools—they are working to create tools that can help enable the kinds of transformations that make organizing possible.

All of the models of engagement described in this book—transactional mobilizing, transformational organizing, and ways to blend the two approaches—emerged historically as associations responded to changing

37. Karpf 2012.

38. McKenna and Han 2014.

technologies, information economies, and political pressures. Each new information regime introduces uncertainty for associations about how to leverage new technologies and build power in the new terrain.<sup>39</sup> This whirlwind tour of changing historical patterns of mobilizing and organizing in American politics demonstrates the fundamental point that widespread organizing becomes more likely when civic associations need to organize to build power. Civic associations are most likely to engage in the hard work of organizing when they see it as a way for them to meet their goals. In the contemporary era, the affordances created by digital tools can sometimes enable associations to reach their transactional engagement goals with mobilizing alone—making it seem, in the contemporary environment, that the hard work of transformational organizing is not needed. For associations feeling the limits of transactional mobilizing, however, alternate models of engagement need to be clear. This book presents those alternate models.

This incentive structure linking models of engagement to association power, however, exists whether or not online tools for collective action are available. New technologies for communication and collaboration, new data, and new modes and structures of participation have not changed the core principles that differentiate transformational organizing from transactional mobilizing. Whether associations are using online or offline tools, if they want to develop the capacity of people to engage in further activism and become leaders, they have to create opportunities for transformation by developing interdependent, autonomous venues for participation, forging a sense of community, and training people in the online and offline skills they need to become leaders or deepen their activism. In both the online and offline context, in other words, the core lessons from this book remain true. While some debate whether the changes wrought by the new information age are “good” or “bad,” or “effective” or “ineffective,”<sup>40</sup> I argue that the more important question is about how associations use these new tools to engage activists. The important distinction is not whether the tools

39. Bimber 2003.

40. Morozov 2009; Gladwell 2010.

are online or offline, but instead how the associations use various tools to build power. This book thus describes how civic associations cultivate political activists and develop civic leaders in the modern era.

## CHAPTER OVERVIEW

The following chapters explore the ways in which civic associations act as mobilizers and organizers to cultivate activism and leadership. Chapter 2 sets the stage for the study by diving into more of the theory and method behind the study. I consider alternative possibilities that could explain the differences between high-engagement and low-engagement sites. Perhaps high-engagement sites engage more people because they are in more politically active communities, or because they attract people who are more interested in activism. To address these possibilities, chapter 2 describes the similarities within the pairs of high- and low-engagement chapters selected for study in the People for the Environment and the National Association of Doctors. I draw on individual- and community-level data to ask whether and how the individual traits of members and community characteristics differ across the high- and low-engagement chapters. While minor differences do exist, they are not sufficient to explain the statistically significant gaps in rates of activism observed across these local chapters. Yet, I show that the high-engagement chapters were consistently able to engage more people than the low-engagement chapters during the period of the study. Why? Given the similarities in the communities they worked in and the individuals who joined, what explains these differences?

The appendix contains a further description of the methodology used in this study and supplements the information in chapter 2. Details are provided in the appendix so that they do not interrupt the narrative flow for readers less inclined to wade through the methodological weeds. For interested readers, the appendix describes (a) the process used to select the two national associations included in the study; (b) more detail on the two associations, their place in the broader landscape of civic associations, their relationships to the local chapters, and their overall functioning;

(c) details on how the high- and low-engagement locals included in the comparative case study were selected; (d) descriptions of the community and structural characteristics of the locals included in the comparative case study; (e) demographic and political profiles of the new members joining these local chapters; (f) a detailed discussion of the literature behind the alternative hypotheses explaining differences between high- and low-engagement chapters; and (g) a description of my relationship to the associations in the study.

Chapter 3 continues the argument by examining the myriad factors that come together to influence the way association leaders interpret their strategic environment, make choices about whether to organize or mobilize, and the divergent structures of responsibilities that ensue. It describes how many of the high-engagement chapters that chose to organize did so as the result of some kind of exogenous challenge that pushed them to adopt an organizing approach. Some of the chapters, like Phil's, faced a resource constraint. They had to organize a larger geographic area than they were able to cover with paid staff or existing leaders, or they needed to engage more people than they were able to with existing staff and volunteer leaders. As a result, they began to organize to turn more activists into leaders, so that a larger group of people could share the burden of the work. Many of the high-engagement chapters in the study had similar historical, episodic reasons that forced them to invest a larger number of volunteer leaders with responsibility. Depending on the way they interpreted the challenges they faced and the choices they had before them, many opted to organize and to invest in developing the capacity of volunteers to become leaders. In addition, this chapter describes the way the choice to organize or mobilize has important structural implications. I describe the structural differences between the way a lone wolf model, a mobilizing model, and an organizing model distributes leadership responsibilities. Once sites develop the practice of organizing or mobilizing, however, it has a strategic "stickiness" (or path dependence) to it that makes it more likely they will continue to organize in the future. This chapter argues that the choices local chapters make about what kind of strategy to pursue depend on a complex set of factors including the challenges the chapter faces, the way it interprets and makes sense of

those challenges, the individual biographies of the leaders involved, and the structures the chapter has in place.

This observed path dependence demonstrates the reciprocal relationship that exists between individuals and organizational contexts. Organizational cultures and narratives shape individuals within the chapter and the ways in which those individuals make meaning out of the world around them. At the same time, these individuals bring their own histories, experiences, and perceptions to the chapter, thus shaping the organizational context. When Phil first joined People for the Environment, he had not been trained as an organizer and did not know how it worked. Yet, he liked working with people, had worked with teams of people through student organizations in college, and was open to finding and learning different ways of doing things. When he took responsibility for an entire geographic area, he learned to organize from the example of other volunteer leaders within the chapter who had been organizing as a way of achieving their goals. His choice was influenced by the fact that other volunteer leaders he worked with had been organizing, that people who preceded him had worked as organizers, and that he was part of an informal social network of volunteer leaders in his state who all took an organizing approach. The way he learned to be a leader, in other words, was shaped by the organizational context, but he was the one who made choices about how to engage people in his geographic area.

Chapters 4 and 5 describe in greater depth the organizational practices that differentiate organizers and mobilizers. Chapter 4 delineates the distinctions between transactional mobilizing and transformational organizing more clearly, and the implications each approach has for how local chapters engage activists in advocacy work. Associations focused on transformational organizing are more likely to engage volunteers in work that brings them into contact with each other, give them some strategic autonomy, and shows them how their work fits into a larger whole. Even in modern civic associations that use Internet technologies for mobilizing and organizing, time-tested techniques of relationship-building and investing in people's development form the core of successful organizing strategies. These relational commitments become an important source of motivation. The commitment to

activism, then, is borne not only of commitment to the issue but also of commitment to other people. In addition, local leaders provide extensive feedback to activists and reflect intentionally with members so that they begin to understand their own actions in light of their own agency. I describe the differences in the ways high- and low-engagement chapters make requests of their members and support their activism. As they ask individuals to engage in activism and then support them in their work, high-engagement chapters build strong interpersonal relationships with the activists and invest in their skills and motivations as leaders. This focus on long-term relational work differentiates them from the low-engagement chapters.

Chapter 5 focuses on the question of how associations achieve scale even as they do transformational organizing. I describe strategies chapters use to mobilize their members to achieve transactional outcomes at scale. I show how chapters blending mobilizing and organizing used mobilizing strategies that had beneficial downstream effects for the association by laying the foundation for future organizing. For instance, in the process of building lists of potential activists, low-engagement chapters are more likely to use relatively passive marketing strategies that allow them to post information and wait for people to consume it. High-engagement chapters are more likely to target people more directly and encourage more interactive activity, using strategies that helped the chapter build leadership skills and motivations among leaders. The high-engagement chapters thus bring far more intentionality to their mobilizing, building the capabilities of leaders even as they mobilize to continually expand their capacity to mobilize at scale. I draw on observational data to describe different kinds of strategies and also the findings of three experimental studies testing the effect of different online strategies in recruiting activists. These experiments test some of the strategies used by high-engagement chapters to generate transactional outcomes while still creating beneficial downstream effects. These studies show that the extent to which the association seeks to develop activist identities makes a difference in whether people respond to the request for action. The organizational activities, in other words, matter.

Chapter 6 concludes the book. I begin by reviewing the findings from previous chapters and discuss the ways in which they are distinct from previous research and conventional wisdom on activism. Because data in the book come from research with two major civic associations, I also discuss the external validity of these findings, examining publicly available data on mobilizing practices of other associations to show important commonalities across them. I then discuss existing research on the sources of political activism and recast the literature in light of the new findings from the book. The chapter also discusses the implications of this research not only for scholarship but also for practice. What are the policy and practical implications of this work? I argue that the book develops key insights into ways to mobilize traditionally hard-to-mobilize populations. Many people report believing that civic and political involvement is important, but many fewer people get involved. Identifying association strategies that can catalyze individual motivations to engage in activism brings us one step closer to understanding how to close the gap between intention and action.

## CONCLUSION

Democracy works when people exercise their right to have a voice in the political system—but democracy fails when people do not, or do not do it very thoroughly. By attending rallies; contacting elected officials and media; reaching out to neighbors, friends, and family; and otherwise expressing their views in the public arena, activists play an important role in American politics. They disproportionately see their views enacted in policy outcomes and are crucial for mobilizing others to participate. In a Tocquevillian sense, activists are the threads that hold the social and political fabric of America together. Many of these activists become involved through civic associations. Some 79 percent of activists report getting involved through a civic association.<sup>41</sup>

41. Verba, Schlozman, and Brady 1995, 62.

By bringing people together for collective activity, associations teach people the basic skills of democratic citizenship while advocating for their members' interests in the public arena. Civic associations have the potential to cultivate and nurture democratic participation to create new models for collective action. Through the ways in which they reach and engage people, these associations can become engines of activism that propel people to higher levels of involvement. This book examines the way in which modern associations do that by examining their engagement strategies from the perspective of both the association and the volunteer.

A strong body of research on civic and political participation already informs our understanding of activism. While building on this previous research, this book also differs from it in three important ways. First, most prior work is based on research with civic associations that pre-date the Internet revolution. Second, prior research focuses more on the act of joining or affiliating with an association than on the choice to engage in ongoing activity. Third, there is little research on civic leadership in particular. By examining how modern civic associations blend mobilizing and organizing to develop activists and leaders, I uncover the core principles that make it possible for civic associations to engage people in civic and political action, develop their democratic capacities, and build the foundation on which our democracy rests. People power the associations; this book describes how associations power people.

## Setting up the Comparative Case Studies

At the core of this study is an important puzzle uncovered by the data I collected: even though the same kinds of people joined high- and low-engagement chapters, the high-engagement chapters were able to consistently engage more people in activism than the low-engagement chapters. In other words, the members were the same but the participatory outcomes were different. Figure 2-1 depicts these differences.

At the beginning of my study, I identified a group of individuals who had just joined the National Association of Doctors and People for the Environment. I surveyed them about a range of topics, including their personal backgrounds, their reasons for joining, and their previous activity in civic associations. Then, I compared the characteristics of people joining the chapters with historically low levels of engagement to those joining chapters with historically high levels of engagement. As discussed in more detail later in this chapter, and as shown in figure 2-1, the differences at the outset were minimal. When people first joined the National Association of Doctors and People for the Environment, those joining high-engagement organizations were no more likely to be active in civic associations than those joining low-engagement organizations (the differences between these groups were about 4 percentage points in both associations and were not statistically significant).



# Services are Bad for People

*You're either a citizen or a client*

John McKnight

Human services need clients. They need clients to survive because without clients the United Way or the government will no longer fund them. Therefore, professional social service providers have a vested interest in people needing them. If they can't claim that there are many people out in the neighborhoods who need their services, then their funding dries up and the middle and upper middle class service providers lose their jobs. Those of us who have spent a considerable time in low income neighborhoods know that service providers traditionally manipulate their data to make it look like they are providing an invaluable service to a community where, they claim, there are evermore people in need.

Communities, unlike human services, need citizens. Citizen is the name for the people in a democratic society who have an equal share of the total power of the society. However, a citizen has much more power than a vote. Voting is a very individual act that entails giving power away to someone who will hopefully represent you. The definition of a powerful citizen can't end there because really powerful citizens make power by coming together and take power by acting together.

In *Democracy in America* Alexis De Tocqueville said that ours was the strongest democracy on the planet, not because of our free voting system, but because of the preponderance of active citizen associations that worked on solving problems collectively.

Service systems require clients and community organizations require citizens. That is why service systems are often antithetical to powerful communities.

Systems are hierarchal and not democratic. They harness people's power to execute the plan of a central authority.

Community organizations are the vehicles that harness the potential power of the citizens to create and execute their own plan. Citizens make power by coming together and take power by acting together on issues.

When citizens get together and say, "Our orga-

nization can solve many of the problems that human service systems control, then there will be a conflict. The vested interests of the social service system will attempt to thwart the efforts of the community organization to control what happens in its neighborhood.

The professional/client model is a superior versus inferior, or dominant versus submissive relationship. While well-run services have their place, they are never going to empower neighborhoods. In fact, when analyzing communities, you'll find that the more services there are in that neighborhood, the less power that community has to control its future.

Service systems act on the premise that the professional has expertise and the client has the problem. The problem solving power of the people in the neighborhoods is unimportant. That professional idea is exactly the opposite of what community organizing attempts to do. The organizer tells the people that they have problem solving abilities

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*When analyzing communities, you'll find that the more services there are in that neighborhood, the less power that community has to control its future.*

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and they can change their community.

Let me use the example of my calcified big toe. I'm certainly happy that there are professionals out there who know what to do to treat this problem, and I use one of them. But my personal power is directly related to my use of professionals. I try to depend upon them as little as possible. Because if my life is heavily involved with the social worker, the doctor, the psychiatrist, two things begin to happen to me. One is that I enter into a world of dependence. The other is that my money is increasingly consumed by these people, diminishing my ability to make financial choices. If I become surrounded by a forest of services, then I've lost much of my



power to make decisions.

It's the same with a community. If it is surrounded by a forest of services, then it loses the power to decide as a community. It should go without saying that community organizers should not act as arborists, teaching people how to grow a forest of services around them. That is the approach of the misinformed community organizer. This

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*Alinsky realized that all the money that went into the social service systems in a community competed directly with the organizing process.*

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organizer mistakenly tries to make more clients, rather than expanding the power of the citizen. The powerful community organization, conversely, seeks political and economic control over the services in its community.

A good test of the community's control over services can be accomplished by asking four questions. The first is, who actually controls the service? Does the community have the final say in the decision making process or is it just an outpost of a big system where local opinion has no value?

Second, who does the service system hire? Does it hire professionals who take money or human resources out from a community, or does it put money and jobs into the community?

Third, who does the service provider purchase its resources from? Are they buying locally or is the money in the community being circulated out of its domain?

And fourth, and least important, although this question receives the most attention, who is being served? Answering these four questions will give a community organization a pretty good idea whether they have control over the service providers.

Saul Alinsky, in many ways the founder of modern community organizing, hated anything resembling social workers. I remember when Sargent Shriver was heading up the federal government's anti-poverty program. We persuaded Saul to come to a conference and debate Shriver about the merits of the work of the anti-poverty program. Saul was absolutely contemptuous of the social service focused anti-poverty program, assailing it as a substi-

tute for real problem solving in poor neighborhoods. He finished his presentation at the debate by telling Shriver, "Your goddamned program is political pornography!"

Alinsky realized that all the money that went into the social service systems in a community competed directly with the organizing process. The more services and money for services in the community, the harder it is to organize and empower that community.

Today, on the front lines in the community, the agents of the service system are mainly non-profit agencies and individual professional providers. The government used to provide services directly, but now it is the major funder of services and not the providers of services. However, the government is not entirely out of the service business.

Take public housing for example. Public housing tenants are clients, the receivers of services provided by the housing authorities. No one would say that these tenants are empowered. The conditions of public housing developments show the effects of this dominant/submissive service relationship. Today, however, there has been a push by residents to become managers and providers in the projects. Resident groups across the country are trying to overthrow the service ideology created in public housing and replace it with the principles of community organization.

The principles of community organization are simple and straightforward: One, everyone is a citizen first, a client-consumer second. Two, to attain power people have to act collectively. They must come together and say, "We are the principal problem solvers in this community."

A good example of this idea in action is the present school reform measures in Chicago. For years educators protected centralized power in the city's school system. Communities were essentially in a professional/client relationship with educators, and became powerless to change the poor conditions of the schools. Initially, reform efforts were focused on the top management of the system. So Chicago proceeded to go through 5 superintendents. Only "the best and the brightest" educational professionals were sought for the position. But student test scores kept going down regardless of which professional controlled the system.

Communities finally realized they could no longer afford to be clients of the systems controlled by professional educators. They saw that changing

the professionals at the top, but leaving the system of professional control in place was not going to solve anything. What was really needed was genuine reform. That meant changing power relationships by redefining who was in control. Therefore, Chicago neighborhood organizations worked strenuously to get legislation passed that would return control of the schools to the local communities.

As a result, the state legislature passed a law dividing the school system into 468 school boards elected by local citizens. Now, the locally elected board has the power to hire and fire the principal, develop curriculum and budget the school's money. The intent of the neighborhoods to regain control over the professional service system succeeded. Neighborhood power has replaced the professional dominance of the centralized management system. It is clear from this example that the community organizations should never let the professionals become dominant.

Effective organizing also mobilizes people to help each other. Human services are a second rate substitute for the community building process. Services cannot get people together to form a day care cooperative or a neighborhood watch. This is the unique power of citizen associations, tackling community-wide problems like crime and drugs, or working to keep elderly residents in the neighborhood.

Community organizations that have real power have an economic focus rather than a service focus. In our society, power equals organized people or organized money. Effective community organizations, for the most part, use people power to affect money power. The organizing question is, "How can we have a local economy that offers real choice and the potential for a good living?"

Because power comes from choice, community organizations should realize that if money in the community goes to the United Way service systems, and not for community empowerment or economic development, then the community needs to work hard to regain control over the money the service system siphons off. Education, welfare, social services, all this money needs to be redefined and controlled by local groups.

A fair indicator of an empowered community is the amount of goods and income being generated by the residents. In powerless communities, goods and income are scarce. Instead, government programs, the United Way and private foundations offer ser-

vices, not straight income. In Chicago, for instance, 25,000 public dollars comes into the city for every low income family of four people. But this family receives only 9,000 dollars in cash. The rest of the money is consumed by health and human service professionals provided for low-income communities. Thus, the low-income family is service rich and money poor. This is, in effect, legislated poverty because adequate public income is appropriated but is not available for choice. It is available for services only.

People will argue however that poor people can't be trusted with cash. They will say the government knows best how to spend poor people's money. This notion is what built the social service empire on the backs of America's poor. As people have more power they become more responsible, not the other way around. Responsibility grows with authority. Community organizing leads neighborhood residents to become responsible problem solvers in the neighborhood. When residents realize they have the power to change things, they start to see how the community gives away its own power in exchange for services.

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*Education, welfare, social services, all this money needs to be redefined and controlled by local groups.*

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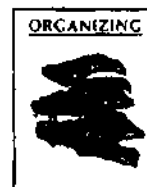
Unfortunately, some of the biggest community busters within the neighborhoods have been some of the churches. In these churches there is a heavy emphasis on charity. It is manifested in church members who hear a call to "serve" others. While this is a natural part of the church experience, it degenerates easily into the dominant-submissive relationship so common in professional services. These churches say they are involved in or sponsor organizations that benefit the community. But the church's charity motive weakens the capability of building empowered community institutions dedicated to social change. In these churches the result of the congregation's concern is to create, fund or become part of a professional service network. In these churches the pastor responds to those with problems by sending them to service agencies, saying in effect, the power is not in this church to solve

your problem, the power lies elsewhere in professionals. These are the community busting churches, those who assume the task of creating more services rather than building problem solving religious congregations.

Effective pastors connect people to help each other. They work to bring the knowledge and capacities of the congregation together. However, many mainline churches are powerless today because they actively give away the power of the congregation to help each other or its community. Their pastor will refer a "problem kid" to a professional youth counselor and will lead a drive to get more youth counselling services into the community. This action robs his church and his community of potential power.

An effective community is one where people are committed to each other and solve problems together. An effective community is moving away from being filled with clients. A powerful community is the home of the citizen, and can harness the power of citizens through the vehicle of community organization.

John McKnight is Director of Community Studies at the Center for Urban Affairs and Policy Research at Northwestern University.



# The Power of Deep Organizing

BY

SAM GINDIN

Jane McAlevey's *No Shortcuts* provides a dynamic framework for building union power.

The profound defeat of the US labor movement over the past three to four decades is usually measured by the loss of things that workers once took for granted like decent wages and benefits. A less quantifiable but ultimately more decisive indicator is the retreat from possibilities. By extension, the labor movement's renewal (or reinvention) is inseparable from reversing, through effective struggle, this lowering of expectations. Jane McAlevey captured this sentiment in the title of her first book, *Raising Expectations (and Raising Hell)*, a memoir based on her experiences as a labor organizer.

The underlying argument of *Raising Expectations* was that while the threat of globalization, austerity, and anti-union legislation is real, these factors can also be an excuse; the mantra of "Globalization (or whatever) made us do it!" was not of course an entirely incorrect sentiment, but it avoided asking to what extent the problem also lay with the unions themselves.

*Raising Expectations* was full of struggles that McAlevey was directly involved in — struggles that showed what could be done despite the overwhelming power of capital. It had a personal, chatty feel to it and had an instant and powerful impact on rank-and-file workers and labor activists, quickly and deservedly making McAlevey a hit on the labor circuit as a speaker, trainer, and strategist.

The crisis within the labor movement has had all kinds of unions scrambling to find "new" models. But leaderships that were averse to institutional risk and lacked faith in their members — or worse, feared an awakened membership — gravitated to alternatives that were no alternatives at all: corporate campaigns that substituted PR and moralizing for organizing, deals with employers that left the members aside, mergers that added size but no energy or strategy. Refusing to build working-class agency, their eventual failure should not have surprised anyone.

As the title of McAlevey's second book asserts, there are no shortcuts. In *No Shortcuts: Organizing for Power in the New Gilded Age*, she argues that only a radical rethink of strategy — which implies a wholesale top-bottom restructuring of everything about how unions function and allocate resources; how they relate to their members, the community and employers; how they develop leadership and how they bargain; and how they understand “politics” — has any chance of rebuilding working-class power.

*No Shortcuts* is more academic and more conceptual than *Raising Expectations* yet remains very readable. The prime concern of both books is working-class agency and *No Shortcuts* repeatedly emphasizes the fundamental differences in how advocacy, mobilization, and organizing proper deal with worker agency.

Advocacy is the lowest form of worker participation. It “doesn’t involve ordinary people in any real way; lawyers, pollsters, researchers, and communications firms are engaged to wage the battle.” Mobilizing does bring significant numbers of people into the fight, but they are, McAlevey contends, generally the already committed activists, not the mass of the workforce and community, “because a professional staff directs, manipulates, and controls the mobilization; they see themselves, not ordinary people, as the key agents of change.”

It is the third approach, organizing proper, that McAlevey insists on because it “places the agency for success with a continually expanding base of ordinary people, a mass of people never previously involved — that’s the point of organizing.” Campaigns of course matter in themselves “but they are primarily a mechanism for bringing new people into the change process and keeping them involved.” It is ordinary people who “help make the power analysis, design the strategy, and achieve the outcome. They are essential and they know it.”

*No Shortcuts* provides a wide variety of new examples beyond McAlevey's own direct involvement that show others independently coming to similar approaches. The rich case studies range across the private and public sector. These clarifying examples include Chicago teachers and food workers in North Carolina, comparative strategic approaches among nursing home workers in Washington and Connecticut, and a worker action center standing outside the formal labor movement, Make the Road in New York. McAlevey also offers a comradely assessment of these movements' strengths and weaknesses that broadens the discussion of what to do and how to do it.

To be clear, McAlevey makes no claim to inventing a new organizing model. Her model is inspired by the class-struggle unionism of the Congress of Industrial Organizations (CIO) in the 1930s and came to McAlevey through her mentors in the iconic SEIU Local 1199 New England. Her contribution lies in the adaptations made based on her own experiences and, as an obsessive organizer, pulling together the model's core elements into a tight methodology of organizing that could be passed on and emulated by others (a how-to manual to complete this trilogy seems the next logical step).

There are criticisms of McAlevey's approach, but before turning to them it is useful to summarize the basic elements of the organizing model she is encouraging:

## 1. Deep organizing.

Unions have been trapped in a mobilizing model that focuses on activists and workers who are already committed, when what is needed is an organizing strategy oriented to reaching the indifferent or opposed workers. Without that, unions cannot build the breadth and commitment necessary to address their powerful adversaries.

## 2. Full-worker organizing.

Union members (and indeed all working people) are more than “just workers.” They are simultaneously members of the community and have a range of untapped potentials as organizers in and outside the workplace. Full-worker organizing builds on those broader potentials.

## 3. Class perspective.

McAlevey laments the marginalization of class in progressive analysis — the dependence on selling your labor power to others in order to meet your needs — and places class at the center of her organizing. Quoting Ira Katznelson: “American urban politics has been governed by boundaries and rules that stress ethnicity, race and territoriality, rather than class, and that emphasize the distribution of goods and services, while excluding questions of production or workplace relations. The centerpiece of these rules has been the radical separation in people’s consciousness, speech and activity of the politics of work from the politics of community.” Building unity across these divisions is fundamental to building class power.

## 4. Organic leaders.

The development of workers into a social force capable of exercising power doesn't occur spontaneously; it needs to be built and this depends on certain workers acting as catalysts. ("All people are not alike.") Identifying such workers is one of the most important and difficult organizing tasks. These organic leaders may hold no elected position but fellow workers look to them for opinions and advice, and have confidence in following them. They carry out the crucial labor-intensive organizing tasks of one-on-one conversations about workplace and community concerns. (Among the issues raised here is how those appointed as organic leaders and those elected as workplace and local leaders relate to each other).

## 5. Power analysis.

Knowing your opponent is indispensable to building your power and strategy. This includes not just mapping your employer's strengths and vulnerabilities but also that of the broader power structure you face geographically — in the community and at higher regional and sometimes national levels.

## 6. Documenting the potential power of workers themselves.

Keeping track of every worker's involvement, assessing hierarchies of leverage within the workplace, and noting influential contacts in the community and support from other unions is the flip side of documenting the employer's power. Power analysis and charting involve technical expertise but the process of gaining this information should also be structured to engage the members as part of their learning and development.

## 7. Direct action.

The model is biased toward direct action. Strikes are not only economic weapons but crucial to building capacities and relationships. The same goes for directly confronting management in the workplace over grievances rather than confining responses to legalistic forms.

## 8. Big bargaining.

The bargaining itself is distinct not only in terms of the demands put on the table, which must be sensitive to both the needs of the members and building community support, but in terms of the structure of bargaining. The innovation here lies in bargaining committees that include representatives from every department, every shift, every classroom, floor, functioning unit — the size of the bargaining team can number in the hundreds.

The justification for this break with the traditional structure of union bargaining teams is that it demonstrates to management the depth of the union's strength; it exposes workers to management arguments and develops confidence in directly confronting them; and it is part of broadening the cadre base. (The extension of bargaining to broad involvement may have roots in anarchist thinking but here it is especially structured and disciplined).

## 9. Stress tests.

Constant self-evaluation is fundamental. Tests are built in so that the union is constantly assessing the strength and weaknesses of organic leaders, the members, and specific departments (for example, any department that cannot show it has a strong majority of its members supporting the union does not get a seat at the table — pushing such departments to do the organizing so they aren't excluded).



## 10. Systematic organizing.

All organizing has to include strategic flexibility. But McAlevey is also adamant that the model is a totality and works because various aspects of the model are self-reinforcing. Cherry-picking pieces can derail success. As well, the fact that this model can be presented as a whole makes it easier to emulate.

## Confronting Class

McAlevey refuses to romanticize the working class; worker spontaneity will not build power. Developing the potential agency of workers requires bringing the specific art of organizing into their struggles by way of carefully trained and experienced staff and full-time paid organizers.

It's this emphasis on staff and paid organizers that has led to criticisms of the model being top-down. But the whole thrust of the model, confirmed in its actual practice, is precisely to identify and develop rank-and-file organic leaders who can in turn be the catalysts for the widest and deepest engagement of workers, and the development of their capacities and confidence as the workplace and community organizers without whom success is impossible.

There is also the argument that in McAlevey's focus on staff and workers, she ignores the role of the "militant minority" that can lead the strikes and resistance that inspires others. There are two crucial distinctions between them and McAlevey's "organic leaders." First, the organic leaders are not self-selected or chosen on the basis of their ideology but their credibility among workers.

Second, the organic leaders are part of a patient, disciplined internal plan to develop majority power as opposed to adventures that might result in high-profile but premature and ultimately counterproductive actions. Nevertheless, if the socialists or independent militants that make up the "militant minority" come, as they did in the 1930s and in some of McAlevey's recent examples, with the kinds of skills and orientation that fit the deep organizing model, their contribution can be invaluable.

One recent critique rejected the very idea of having an organizing model: "Trying to find an ideal 'model' is a distraction. Organizing is hard. It is expensive, risky and even in ideal circumstances fails a lot." No-one would deny the complexities of organizing workers but the point is precisely to *limit* those uncertainties and counter the powerfully resourced and highly systematized efforts of employers. (And no-one would deny that even then the messiness is never totally erased).

Moreover, if organizing is primarily and irrevocably “difficult” it seems to let questioning union structures and practices off the hook. If the idea of an overarching method is precluded, then the question of how radically unions must change to be successful likewise tends to be set aside.

In light of McAlevey’s model and the larger contradictions shaping the struggle to build localized bases of workplace and community power, three questions about the limits of McAlevey’s model arise: First, how can this model be disseminated more broadly? Word of mouth and McAlevey’s publications are not enough given the scale and urgency of the issue.

Second, the model works where there is a union leadership fully committed to implementing it as a whole. But such unions or locals are the exception, not the rule. What then are the model’s implications for operating within unions that are hostile to the model or only interested in pulling particular pieces from it?

Third, there are limits to what unions, even the best unions, can do. Globalization, financialization, austerity, etc. may often be defeatist excuses but they are nevertheless also real barriers and threats to workplace power. Can unions do more than stretch the limits they face or is it necessary to address other forms of working-class organization? Or, pushing the last point a bit further, where in the discussion of power, class, and worker agency does socialism come in?

On the first point of getting this model out there, as successful as McAlevey’s work and books have been in popularizing this approach to building worker power, we need something much more systematic to realize the potentials of deep organizing. Does that part of the labor movement that is sympathetic need to establish an institute to train the organizers who can then fan out across sectors and across the country to multiply the message? And in line with the thrust of McAlevey’s model, should such training include a heavy dose of field work and learning by doing?

But even this would be limited to the few unions already on-side. What then? The Toronto Labor Committee, a group of socialists, labor activists, and organizers, has initiated an experiment in bringing the McAlevey model to a larger working-class base. We had been floundering in trying to create cross-workplace rank-and-file links focused on “democratic, militant, class-based” unionism. As correct as it may have been to attempt this, it was too abstract to sustain rank-and-file interest.

In contrast, using McAlevey’s work to give people a tangible notion of how a transformed union might function and be able to stand up to what they face has led to great interest. The local example of the eleven-thousand-member Elementary Teachers of Toronto (with whom we have links) adopting the McAlevey model powerfully reinforced that interest. We had to first teach ourselves the key components of McAlevey’s model, and then recruit interested rank-and-file workers (and some leaders) to classes that elaborate on the principles and experiences of this model. The next crucial step is asking which pieces of the model can be applied or adapted to building a force within the union to get the model on the union’s agenda.

Alongside this, we have been struggling with how to combine building the union with raising larger, more political questions. One modest element of this, especially but not only in the public sector, is to confront the apparent constraint

of fiscal budgets on what is possible and run educationals for workers on how to read budgets technically and how to understand them politically.

But the larger point is that even the best and most community-rooted unions cannot change the world by themselves and so are confined to the limits of operating under capitalism. Unions can educate about elite and local power but focusing their education on capitalism as a *system* rarely occurs. They can create organic leaders but not necessarily lead them to the next step of becoming organic *socialist* leaders. They can support political parties but do not ask what role workers and unions might have in transforming capital states to socialist states. Such things — all vital to dealing with working-class power — can only be tackled within or alongside an institution with a broader and longer-term perspective: a coherent socialist tendency or party.

In fact, the absence of such a left is not only a limit to further advances, it also goes a long way to explaining the defeats of the labor movement over the past decades. This is suggested by the very origins of the model McAlevey promotes. The Communist Party and other socialist organizations were indispensable to the advances in working-class struggles in the 1930s — the decade out of which McAlevey's model emerged. And it is no coincidence that the remarkable organizing carried out by the Chicago Teachers Union or the Smithfield workers included socialists with their particular skills, connections, strategic sensibilities, and longer-term horizons.

Though *No Shortcuts*, in its concern with revitalizing unions, doesn't directly raise the relationship between class power in the workplace/community and the struggle for socialism, McAlevey does nevertheless make two contributions to that issue: First, and most important, any socialist project demands multiple concentrations of progressive and sustainable institutional power; neither protests nor electoral breakthroughs will mean much without this. McAlevey has demonstrated that building such bases is possible in the here and now.

Second, her model includes general organizing tenets beyond getting workers a union or organizing the already unionized. Principles such as taking class beyond the workplace, identifying organic leaders, seeing all workers as potential organizers of an alternative power base, addressing how to penetrate those not unsympathetic, etc. are of value to *any* class-based organizing, including socialism. What needs careful consideration and assessment is the potentials of adapting McAlevey's organizational insights to taking on capitalism — not just fighting and reforming it, but replacing it.

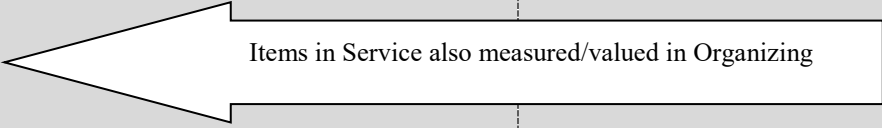
For those of us grappling with the near-overwhelming difficulties of the “how-to” of changing our workplaces, communities, and society, *No Shortcuts* is an invaluable resource. It should be read, passed on, discussed, constructively challenged, and acted on.

#### ABOUT THE AUTHOR

Sam Gindin was research director of the Canadian Auto Workers from 1974–2000 and is now an adjunct professor at York University in Toronto.

# Organizing and Service Working Together

NOTE: When considering the issue of "creating a culture of organizing," it is vital to realize that it is not the issue of organizing vs. service. Service to members is important. The point of consideration is how does a pure "service culture" which is episodic build the capacity of the organization? An organizing culture which is continual and sustainable provides the context for the servicing of members and builds the capacity of the organization. Organizing supports the delivery of services, it is not an either/or proposition. The organization has placed value on those things that we can count and quantify. The following illustrates how an organizing culture provides the context for the service culture.

| <b>Organizing (Continual/sustainable)</b>                                                              | <b>Service (Episodic)</b>                                             |
|--------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
|                      |                                                                       |
| Clearly stated vision developed collaboratively that engages members, leaders, staff                   | Number of members maintained                                          |
| Number of programs and resource allocation that reflect association mission/vision/core values         | Number of grievances filed and processed and employment issues solved |
| Ratio of members involved in programs that welcomes member participation                               | Number of arbitrations                                                |
| Number of new members recruited/ retained                                                              | Number of contracts negotiated/unresolved                             |
| Number of new leaders identified and trained                                                           | Percent of salary increase negotiated                                 |
| Number of new minority leaders identified/trained                                                      | Number of unfair labor practices filed                                |
| Number of members engaged in association decision-making and broaden power sharing in the organization | Number of successful election campaigns                               |
| Number of political and community coalitions                                                           | Amount of PAC fund raised                                             |
| Number of grassroots political action organizers                                                       | Number of successful legislative initiatives                          |
| Purpose of the organization known in community via known "brand" of the organization                   |                                                                       |
| On-going assessment of organizational effectiveness                                                    |                                                                       |



## WHY GRIEVANCES ARE NOT ENOUGH

If only we could count on contract enforcement to keep our workplaces trouble-free.

But every time management gets a chance, it will encroach into territory the union has won, taking away things we thought the contract protected. The contract reflects the balance of power between management and workers at the moment it was signed—but not necessarily the balance today.

Simply filing a grievance doesn't build power. It's not usually a collective activity. While the grievance moves from step to step, the members have nothing to do but wait.

Besides, grievances can fix only a tiny fraction of the injustices that go on in any workplace. Think about the individual workers whose rights are violated. Most won't file a grievance. Some are still on probation, or already facing discrimination, or simply afraid they'll be marked as troublemakers. Some don't realize they have the right to grieve.

Even a good steward can't comb the shop getting all the shy or fearful workers to submit their grievances. In any case, the steward wouldn't have time to file them all; she has to pick her battles.

So of the many grievances that might have been filed, only a handful actually are. Months later, a few are finally won, but only the workers involved ever know about them. Even those with similar problems may not realize that a grievance happened. Most are left stewing over wrongs that go unaddressed.

That's why this book teaches you how to back up grievances with shop floor action or bypass the grievance system altogether. There still won't be time to address every issue—but the more people participate in solving a problem, the more they will develop the skills and confidence to take on other problems, and the union's power will grow.

You're developing a union culture in the workplace—not just at the union hall—where people expect to participate in defending the contract and defending each other.



## Organizing 2 Bargain



### Module 2 – What is Organizing? What is the difference between Strength and Growth?

Thinking of UniServ work as a set of campaign plans helps to refocus the day to day demands of service providing to the longer term work of organizing. A strong campaign plan results in visible wins for the union, develops more leader, attracts more members, and allows for a collective use of resources to win meaningful change. The frameworks in this toolkit will help you in making an effective campaign design with leaders and members.

**Institute Facilitator**  
Ellen Holmes, NBCT  
[eholmes@nea.org](mailto:eholmes@nea.org)



## WHAT'S THE REAL PROBLEM?

Here are some ways to understand what looks like apathy, and to respond to it.

### **"No one seems to care."**

Everyone cares about something—but the *something* might not be what you expect. Pick out a few co-workers you'd like to know better. Make a point of talking with them, and find out what's on their minds.

Maybe the drug-testing policy that's grinding your gears isn't at the top of their list because something else is bugging them more: a foul chemical in the air, a mean supervisor, a toothache and no dental plan, a shift that means they hardly see their kids, being forced to defend a stupid policy to customers... The only way to find out is to listen.

Someone who's facing sexual harassment, for instance, might feel strongly about it—but she might assume it's not *your* issue, or not a *union* issue.

Show your co-workers respect and understanding. When they feel that from you, they're more likely to respect the things you care about.

### **"It's hard to see how things could change."**

Maybe your co-workers are just as bugged by the drug-testing policy as you are, but it seems too big to tackle. The boss has done a good job of cementing the idea that the decision is final—and fighting it sounds like a waste of time.

It's perfectly reasonable that people feel this way, especially if they've always felt powerless and disorganized at work. People are used to going along to get along. If your co-workers have never felt strength in numbers, or seen a group take action to change even something small, why would they believe they could change something big?

As an organizer, it's your job to inspire your co-workers that change is possible if you work together. Part of this is developing a credible plan to win. Ask, "What solution are we proposing?" "Who in management has the authority to say yes?" "What could we do together to get that person to say yes?" Share stories of tactics that have worked elsewhere (you'll learn plenty in this book).

Often it helps to start small. Involving your co-workers in a tiny campaign that gets results is a way to "show, not tell" them that collective action has power.

Look for fights you can win with the people you have on board so far, taking just a small step out of their comfort zone. When it works, more people will be drawn in. As they participate, their confidence will grow, and you can go farther each time. (We'll talk more about choosing an organizing issue in Lesson 4.)

Hopelessness can be a strong habit. It's easier to break a habit with group support. Bringing people together can help individuals get past their discouragement.



## **“No one’s willing to do anything.”**

Have you asked them personally to do something specific? Most of us aren’t natural-born organizers. Many of your co-workers won’t initiate activity—but they might respond if asked directly by someone they trust.

Figure out some very small, specific requests, and personally approach a co-worker. At first this might be as simple as answering a survey, coming to lunch with other co-workers to discuss a problem, or signing a group letter. (We’ll talk more about choosing your tactics in Lesson 5.)

Be respectful of time constraints in their lives. Show lots of appreciation for anything they’re willing to do—and make it clear that any victories were won by the whole team. This attitude of respect will encourage them to do more in the future.

## **“No one comes to meetings.”**

Think about how people are notified about meetings. An email or a notice on the bulletin board isn’t enough. Personal, face-to-face invitations are the best. Divide up your workplace and find several other people to share the work of inviting people individually.

Also consider the practical things that could make meetings more accessible: scheduling, location, childcare, translation, transportation.

When people do come to a meeting, it had better be pleasant and productive—or they won’t be back! People are incredibly busy these days, and you convey respect for

their participation by planning the meeting ahead of time. Prepare a clear agenda, a time limit, and a reason to attend, such as a hot issue.

If a meeting is just to “get information,” it’s easy to skip it. People will be more motivated to attend a meeting where they have a meaningful role to play—for instance, to help make an action plan. If you miss that meeting, there’s a consequence: the plan will be made without your input.

All that said, sometimes people simply can’t make it to meetings—for instance, because of parenting responsibilities. These people can still play crucial roles in organizing while they’re at work. Be flexible.







## APATHY ISN'T REAL

The first attitude adjustment an organizer needs is to get over the idea that co-workers don't care—that your workplace is bogged down in “apathy.”

It's a common gripe. In Labor Notes workshops we often ask union members to make a list of the reasons why people don't get involved where they work. Typical answers include:

- Lack of time.
- Don't know how to do it.
- The union is not open; there's no easy way in.
- Conflicts between groups.
- Conflicts between individuals.
- My co-workers feel that nothing will change.
- They think everyone *else* is apathetic.
- They're looking for individual solutions.
- And the big one: fear.

Sound familiar? It might feel like your co-workers don't care. But push a little bit, and that's never really true.

Everyone cares about something at work. Just about everyone cares about their wages, for instance. Everyone wants respect. No one's indifferent to whether their shift is miserable. It's impossible not to care.

Could it be that your workplace is the one in a million where everything's fine? Maybe your co-workers are completely secure about their jobs, love their supervisors, make excellent money with terrific benefits, have no worries about downsizing or layoffs, face no health hazards, and are confident about their retirement. If so—put down this book and get another hobby!

But it's more likely that people are scared to say anything, or feel powerless.

They might say everything is fine because they don't believe it can change, or they can't imagine it being different, or they assume the problem they care about isn't a “union issue.” Organizing is the antidote.

Everyone cares about something at work.

UFCW Local 400 (CC BY 2.0) [bit.ly/1QSm397](http://bit.ly/1QSm397)



Remember Maria Martínez's co-workers at the meatpacking plant? Most had never been to a union meeting—but they did care that their supervisors were harassing them. They just didn't think they could do anything about it. Once they saw people organizing to tackle the problem, they wanted to get involved.

So when you're assessing why more people haven't stepped up to take on the boss, it's important to find out the actual reasons. You have to diagnose the problem before you can write the prescription.

It's not apathy—but what is it?

You have to diagnose the problem before you can write the prescription.

Step back from your frustration and look at things from an organizing perspective. This chart shows five common problems and how you can help your co-workers get past them:

## HOW THE BOSS KEEPS US DISORGANIZED

| The boss relies on...                                                                | The organizer...                                                                    | Co-workers find...                                              |
|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| ... <b>fear</b> of conflict and retaliation.                                         | ...taps into <b>righteous anger</b> about workplace injustices.                     | ...the <b>courage</b> and determination to act.                 |
| ... <b>hopelessness</b> , the feeling that things can't change and we have no power. | ...helps develop a <b>plan to win</b> , and shares examples of victories elsewhere. | ... <b>hope</b> that change is possible and worth fighting for. |
| ... <b>division</b> , pitting workers against each other.                            | ...identifies <b>common ground</b> and builds relationships.                        | ... <b>unity</b> to act together.                               |
| ... <b>confusion</b> , passing around messages that will alarm or distract us.       | ... <b>interprets</b> and shares information, fitting it into a bigger picture.     | ... <b>clarity</b> to see through the boss's plan.              |
| ... <b>inaction</b> , since problems can't be solved, so why bother?                 | ... <b>mobilizes</b> co-workers to do something together.                           | ...that action gets <b>results</b> and solves problems.         |



Download this chart at [labornotes.org/secrets](http://labornotes.org/secrets)

## GUIDELINES FOR SHIFTING THE DOMINANT NARRATIVE

### DO

- **UNMASK**
  - Name the dominant narrative when you see it at work.
  - Point out that what you just saw on the news or heard from a friend, or the law that was just passed, was based on particular values and beliefs.
  - *“The way you are talking about the recent contract settlement sounds like you think teachers are pretty greedy and we’re only looking out for ourselves.”*
- **ELEVATE**
  - Name the values and beliefs from our new narrative that you want to see lived out in the world.
  - Connect it to places where your audience may see that happening already.
  - *“I really like it when parents come in and express their appreciation – especially when they acknowledge they don’t now how we do it – it helps me feel valued and respected”*
- **CONTRAST**
  - Lay out what might be different if your values/convictions were the ones shaping what happens in the world.
  - Be specific about how we have the choice to approach situations through a different belief system.
  - Invite a rethinking of the situation.
  - *“I guess we have to decide if we want to scapegoat teachers for the many challenges we face or accept teachers as willing and able partners in educating all kids.”*
- **DRAW ON YOUR OWN JOURNEY**
  - While it’s important to personalize this, it’s also important to do it in a way that anyone can see themselves in it. Describing your own realizations and shifts will help others find their own way in the conversation.
  - *“I can understand your reaction, there are times when I realize that I’ve been reacting to what others say and not putting forth my own beliefs – it gets discouraging – but I realize now I’ve only been making it worse.”*
- **SUSTAIN YOUR EFFORTS AND CONNECT WITH OTHERS**
  - Shifting a dominant narrative does not happen quickly – it takes sustained effort, over time, with many people working at it.
- **DEMONSTRATE YOUR WORLDVIEW, DON’T JUST WRITE AND TALK ABOUT IT.**
  - Our actions say as much or more about our values and beliefs as our words.

## **DON'T**

- **FOCUS ON CHALLENGING FACTS OR INTERPRETATIONS OF INFORMATION**
  - This will not shift the narrative. Your arguments, as convincing as they may be, will ultimately lose out to the dominant narrative.
- **ATTACK PEOPLE FOR THEIR WORLDVIEW**
  - Many people operate out of the dominant narrative, even if unconsciously. Shifting public narratives will take personal conversion and transformation. You cannot move people if you attack them.
- **NAME THE DOMINANT NARRATIVE AS “WRONG”**
  - Our assumption is that competing values & beliefs live within people. We want to provide people a chance to choose the ones they want to live out of and/or balance those competing narratives (e.g. accountability of and respect for teachers).
- **TRY TO CONVERT OR CONVINCE PEOPLE**
  - We are trying to bring out the best of what is already in people, help them find the resonance for themselves. This is, in part, an emotional journey and our usual approaches to argument and logic don't work so well in this arena.



1201 16th St, N.W. | Washington, DC 20036 | Phone: (202) 833-4000

Lily Eskelsen Garcia  
President

Rebecca S. Pringle  
Vice President

Princess R. Moss  
Secretary-Treasurer

John C. Stocks  
Executive Director

*Dear Association Leader,*

*Whether you are a building representative, committee chair, or local officer, you bring the power of the union to life with our current members and our potential members. We've been listening to you and our members and we know that you want the tools and messages to build a relationship with each member to strengthen our union so that we can win for our members and our students. **This Spring, we conducted extensive polling in states where fair share fees will no longer be collected, and we learned which key aspects of our collective work as a union resonate with our existing members and strengthen their relationship with, and commitment to, the union.** We offer these message points and suggestions to assist you in the work you do at the worksite level. As you review this document, remember that listening to your colleagues, who are members or potential members, is just as important as the message you deliver. Thank you for the work you do as an association leader. The recommendations here are not only based on that most recent research but also on four years of research with our members across the country – both right to work and formerly agency fees states – including interviews, surveys and focus groups looking at membership growth and strength – so we know that every state will benefit from this information today.*

### Member Retention Research Findings

Our research consistently finds that a member's bond with the association (how connected a member feels to his/her local) is the best predictor of a member's intention to remain in the union when given the opportunity to drop. Members who rate their connectedness at 10 are significantly more likely to remain in the union than those who rate their level of connection at 7, 8, or even 9. Merely connecting with our members is not enough. Instead, we must build—and maintain— *strong relationships and deep connections* with our members.

How do we build an enduring bond with members? Through our research, here is what we have learned.

1. **Face-to-face communication:** The more frequently and the more recently we have communicated with members, the more likely they are to want to remain in the union. While online and paper outreach can supplement in-person contact, they are not good replacements. In fact, members who were asked in person to join the union are more likely to have favorable

views of the union than those who received a card in the mail asking them to join. Even years later, this contact continues to impact how connected they feel to their union. ***There is simply no replacement for face-to-face communication.***

2. **Small group and one-on-one contact:** Robust and committed membership is built through small group and one-on-one conversations. Although large group meetings are often necessary, big meetings do not build connectedness. Gathering small groups of members together or having informal and authentic face-to-face conversations are imperative to making sure members feel a bond with their union.
3. **Listening and connecting > asking and telling:** When we are trying to connect with members, we should be listening, not telling. We often ask a member to do x or y for the union or tell a member that the union does x or y. Instead, forging a strong connection means being in listening mode—listening to a member’s concerns, gripes, successes, and achievements. At every level, members must feel heard. This can be as simple as informally asking a member how her day is going, or as substantive as asking what improvements she would like to see, or what changes would make her job easier, better, or more fulfilling. We cannot purport to be our members’ collective voice unless we are willing to listen to what they have to say.
4. **Support is key:** The strongest predictor of our members’ job satisfaction is whether they feel supported. Support means a range of things to members, but most fundamentally it means that someone hears them and has their backs. Support could be the presence of close friendships in the workplace, colleagues with whom to share lesson plans and tips, informal mentors, or people who will speak up when there are challenges at work. Our members are the best sources of support for one another and connections to the union encourage them to care about, support, and nurture their colleagues.
5. **Keep the relationship going:** All relationships require ongoing attention and maintenance; taking members for granted is a sure way of signaling that they don’t matter and weakening the bond they feel with their union. If we want members’ connection to remain intact—and even grow in intensity over time—we must reach out to them both continually and continuously. This not only builds lasting ties; it also helps build member advocacy and activism.

### **Key Message Points on Member Retention**

#### **Salary/Benefits**

- Your membership allows the union to effectively negotiate with your district to secure and improve your salary, benefits, and working conditions. When more members choose to be a part of the union, we can achieve stronger contracts.
- Just look at #RedForEd: union members stood together to improve their salaries and benefits and make sure educators had a voice in their state legislatures.
- Like the saying goes, We all do better when we all do better. We can accomplish much more and get a lot more done by staying in our union and working together to achieve our goals.

#### **Protecting Members**

- Our union has our backs. Whether it's advocating for better salaries or making sure we are protected in the workplace, the union is there to make sure we are not alone.
- As educators, we need to make sure we are protected if we are ever falsely accused. The union gives us that protection and has our backs when we need it most.
- Together, we have the protection that comes from being part of a union that shares our values and advocates for the things we believe in—like support for our professions and resources for our students.

**Educator Voice**

- Decisions about schools and what's best for students should be made by the educators who work with our kids every day. But time after time, mandates are put in place with zero input from educators. Our union empowers us by offering a seat at the table and a more prominent voice in decision-making that affects our students and our jobs.
- It is easy for us as individuals to feel isolated, but as members of our union, we are never alone. Someone always has our back, and we can reach out for support from each other in challenging times.
- Sticking with the union gives us a louder voice and more leverage to change things for the better when we work with our school board or legislature.

**Collective Voice**

- Being a member of our union means having a channel for sharing your frustrations as well as your hopes, and having the power and collective voice to advocate for yourself and your students. So tell me: What are you concerned about, and what would you like to see change?
- Just look at #RedForEd and the role union members played in shining a light on what students and educators need for success. That shows the power we have collectively, and the way to keep it going strong is through our union.
- By sticking with our union, we can lean on each other, come together to meet our challenges, and advocate for the things that help our students—and us—succeed.



## INTRODUCTION TO ENGAGEMENT ORGANIZING

*Organizing and Leadership Practices that Lead to People-Powered Change*

### OBJECTIVES:

- Think critically about organizing, leadership, and relational power
- Understand the basics of interdependent leadership in contrast to other leadership models
- Overview the 5 organizing practices of interdependent leadership: Story, Relationships, Structure, Strategy and Action

### ORGANIZING IS:

Identifying leaders and coordinating them in leadership teams,  
Building community and commitment around that leadership,  
Building power from the resources of that community,  
Using that power strategically to make concrete change in the world.

### WHAT IS LEADERSHIP?

*“Leaders are those who take responsibility for enabling others to achieve shared purpose in the face of uncertainty”*

In order to launch a new campaign, or strengthen an existing one, your job as an organizer is to identify and recruit others to work with you to build a campaign powerful enough to win change.

But what type of leader should you be, and what are you looking for in others? Sometimes we think the leader is the person everyone goes to, like this “I’m the leader!” approach.

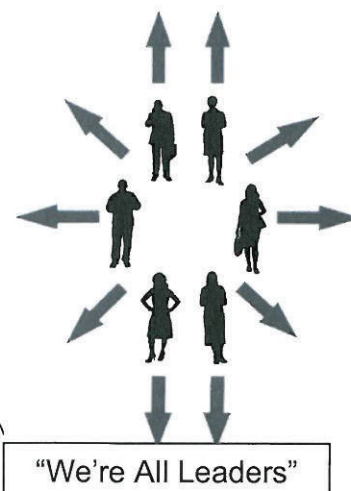
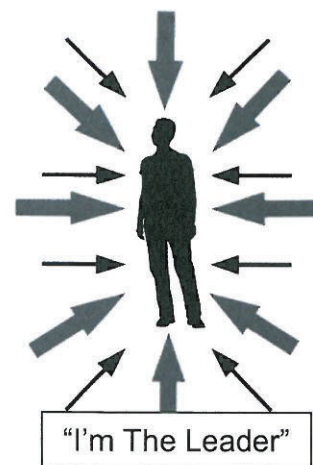
But what does it feel like to be the “leader” in the middle? What does it feel like to be the arrow that can’t get through? What happens if the “leader” in the middle drops out?

Sometimes we go to the other extreme and think we don’t need a “leader.” We can all lead, because “we’re all leaders!”

Sometimes this works. But who’s responsible for coordinating everyone? And who’s responsible for pushing the whole group forward when you can’t reach a decision? Who takes ultimate responsibility for the outcome?

Organizers are those who ultimately are held accountable for meeting campaign goals. However, organizers are also

*Originally adapted from the works of Marshall Ganz of Harvard University Modified by The N*





## Organizing 2 Bargain



### Module 3 – Who are our People? Who are our Leaders? What are our Structures?

Thinking of UniServ work as a set of campaign plans helps to refocus the day to day demands of service providing to the longer term work of organizing. A strong campaign plan results in visible wins for the union, develops more leader, attracts more members, and allows for a collective use of resources to win meaningful change. The frameworks in this toolkit will help you in making an effective campaign design with leaders and members.

**Institute Facilitator**  
Ellen Holmes, NBCT  
[eholmes@nea.org](mailto:eholmes@nea.org)

## **Leadership in the Age of Complexity: From Hero to Host**

**Margaret Wheatley with Debbie Frieze ©2010**

published in Resurgence Magazine, Winter 2011

For too long, too many of us have been entranced by heroes. Perhaps it's our desire to be saved, to not have to do the hard work, to rely on someone else to figure things out. Constantly we are barraged by politicians presenting themselves as heroes, the ones who will fix everything and make our problems go away. It's a seductive image, an enticing promise. And we keep believing it. Somewhere there's someone who will make it all better. Somewhere, there's someone who's visionary, inspiring, brilliant, trustworthy, and we'll all happily follow him or her. Somewhere...

Well, it is time for all the heroes to go home, as the poet William Stafford wrote. It is time for us to give up these hopes and expectations that only breed dependency and passivity, and that do not give us solutions to the challenges we face. It is time to stop waiting for someone to save us. It is time to face the truth of our situation—that we're all in this together, that we all have a voice—and figure out how to mobilize the hearts and minds of everyone in our workplaces and communities.

Why do we continue to hope for heroes? It seems we assume certain things:

- Leaders have the answers. They know what to do.
- People do what they're told. They just have to be given good plans and instructions.
- High risk requires high control. As situations grow more complex and challenging, power needs to shift to the top (with the leaders who know what to do.)

These beliefs give rise to the models of command and control revered in organizations and governments world-wide. Those at the bottom of the hierarchy submit to the greater vision and expertise of those above. Leaders promise to get us out of this mess; we willingly surrender individual autonomy in exchange for security.

The only predictable consequence of leaders attempts to wrest control of a complex, even chaotic situation, is that they create more chaos. They go into isolation with just a few key advisors, and attempt to find a simple solution (quickly) to a complex problem. And people pressure them to do just that. Everyone wants the problem to disappear; cries of "fix it!" arise from the public. Leaders scramble to look like they've taken charge and have everything in hand.

But the causes of today's problems are complex and interconnected. There are no

simple answers, and no one individual can possibly know what to do. We seem unable to acknowledge these complex realities. Instead, when the leader fails to resolve the crisis, we fire him or her, and immediately begin searching for the next (more perfect) one. We don't question our expectations of leaders, we don't question our desire for heroes.

### **The Illusion of Control**

Heroic leadership rests on the illusion that someone *can be* in control. Yet we live in a world of complex systems whose very existence means they are inherently uncontrollable. No one is in charge of our food systems. No one is in charge of our schools. No one is in charge of the environment. No one is in charge of national security. No one is in charge! These systems are emergent phenomena—the result of thousands of small, local actions that converged to create powerful systems with properties that may bear little or no resemblance to the smaller actions that gave rise to them. These are the systems that now dominate our lives; they cannot be changed by working backwards, focusing on only a few simple causes. And certainly they cannot be changed by the boldest visions of our most heroic leaders.

If we want to be able to get these complex systems to work better, we need to abandon our reliance on the leader-as-hero and invite in the leader-as-host. We need to support those leaders who know that problems are complex, who know that in order to understand the full complexity of any issue, all parts of the system need to be invited in to participate and contribute. We, as followers, need to give our leaders time, patience, forgiveness; and we need to be willing to step up and contribute.

These leaders-as-hosts are candid enough to admit that they don't know what to do; they realize that it's sheer foolishness to rely only on them for answers. But they also know they can trust in other people's creativity and commitment to get the work done. They know that other people, no matter where they are in the organizational hierarchy, can be as motivated, diligent and creative as the leader, given the right invitation.

### **The Journey from Hero to Host**

Leaders who journey from hero to host have seen past the negative dynamics of politics and opposition that hierarchy breeds, they've ignored the organizational charts and role descriptions that confine people's potential. Instead, they've become curious. Who's in this organization or community? What skills and capacities might they offer if they were invited into the work as full contributors? What do they know, what insights do they have that might lead to a solution to this problem?

Leaders-as-hosts know that people willingly support those things they've played a part in creating—that you can't expect people to 'buy-in' to plans and projects developed elsewhere. Leaders-as-hosts invest in meaningful conversations among people from

many parts of the system as the most productive way to engender new insights and possibilities for action. They trust that people are willing to contribute, and that most people yearn to find meaning and possibility in their lives and work. And these leaders know that hosting others is the only way to get complex, intractable problems solved.

Leaders-as-hosts don't just benevolently let go and trust that people will do good work on their own. Leaders have a great many things to attend to, but these are quite different than the work of heroes. Hosting leaders must:

- provide conditions and good group processes for people to work together.
- provide resources of time, the scarcest commodity of all.
- insist that people and the system learn from experience, frequently.
- offer unequivocal support—people know the leader is there for them.
- keep the bureaucracy at bay, creating oases (or bunkers) where people are less encumbered by senseless demands for reports and administrivia.
- play defense with other leaders who want to take back control, who are critical that people have been given too much freedom.
- reflect back to people on a regular basis how they're doing, what they're accomplishing, how far they've journeyed.
- work with people to develop relevant measures of progress to make their achievements visible.
- value conviviality and esprit de corps—not false rah-rah activities, but the spirit that arises in any group that accomplishes difficult work together.

### **Challenges from Superiors**

It's important to note how leaders journeying from hero to host use their positional power. They have to work all levels of the hierarchy; most often, it's easier to gain support and respect from the people they lead than it is to gain it from their superiors. Most senior leaders of large hierarchies believe in their inherent superiority, as proven by the position they've attained. They don't believe that everyday people are as creative or self-motivated as are they. When participation is suggested as the means to gather insights and ideas from staff on a complex problem, senior leaders often will block such activities. They justify their opposition by stating that people would use this opportunity to take advantage of the organization; or that they would suggest ideas that have no bearing to the organization's mission; or that people would feel overly confident and overstep their roles. In truth, many senior leaders view engaging the whole system as a threat to their own power and control. They consistently choose for control, and the resultant chaos, rather than invite people in to solve difficult and complex problems.

Leaders who do know the value of full engagement, who do trust those they lead, have to constantly defend their staff from senior leaders who insist on more controls and

more bureaucracy to curtail their activities, even when those very activities are producing excellent results. Strange to say, but too many senior leaders choose control over effectiveness; they're willing to risk creating more chaos by continuing their take-charge, command and control leadership.

### **Re-engaging People**

Those who've been held back in confining roles, who've been buried in the hierarchy, will eventually blossom and develop in the company of a hosting leader. Yet, it takes time for employees to believe that this boss is different, that this leader actually wants them to contribute. It can take 12 to 18 months in systems where people have been silenced into submission by autocratic leadership. These days, most people take a wait-and-see attitude, no longer interested in participating because past invitations weren't sincere, or didn't engage them in meaningful work. The leader needs to prove him or herself by continually insisting that work cannot be accomplished, nor problems solved without the participation of everyone. If the message is sincere and consistent, people gradually return to life; even people who have died on the job, who're just waiting until retirement, can come alive in the presence of a leader who encourages them and creates opportunities for them to contribute.

Leaders-as-hosts need to be skilled conveners. They realize that their organization or community is rich in resources, and that the easiest way to discover these is to bring diverse people together in conversations that matter. People who didn't like each other, people who discounted and ignored each other, people who felt invisible, neglected, left out—these are the people who can emerge from their boxes and labels to become interesting, engaged colleagues and citizens.

Hosting meaningful conversations isn't about getting people to like each other or feel good. It's about creating the means for problems to get solved, for teams to function well, for people to become energetic activists. Hosting Leaders create substantive change by relying on everyone's creativity, commitment and generosity. They learn from firsthand experience that these qualities are present in just about everyone and in every organization. They extend sincere invitations, ask good questions, and have the courage to support risk-taking and experimentation.

### **Are You a Hero?**

Many of us can get caught up acting like heroes, not from power drives, but from our good intentions and desires to help. Are you acting as a hero? Here's how to know. You're acting as a hero when you believe that if you just work harder, you'll fix things; that if you just get smarter or learn a new technique, you'll be able to solve problems for others. You're acting as a hero if you take on more and more projects and causes and have less time for relationships. You're playing the hero if you believe that you can save the situation, the person, the world.

Our heroic impulses most often are born from the best of intentions. We want to help, we want to solve, we want to fix. Yet this is the illusion of specialness, that we're the only ones who can offer help, service, skills. If we don't do it, nobody will. This hero's path has only one guaranteed destination—we end up feeling lonely, exhausted and unappreciated.

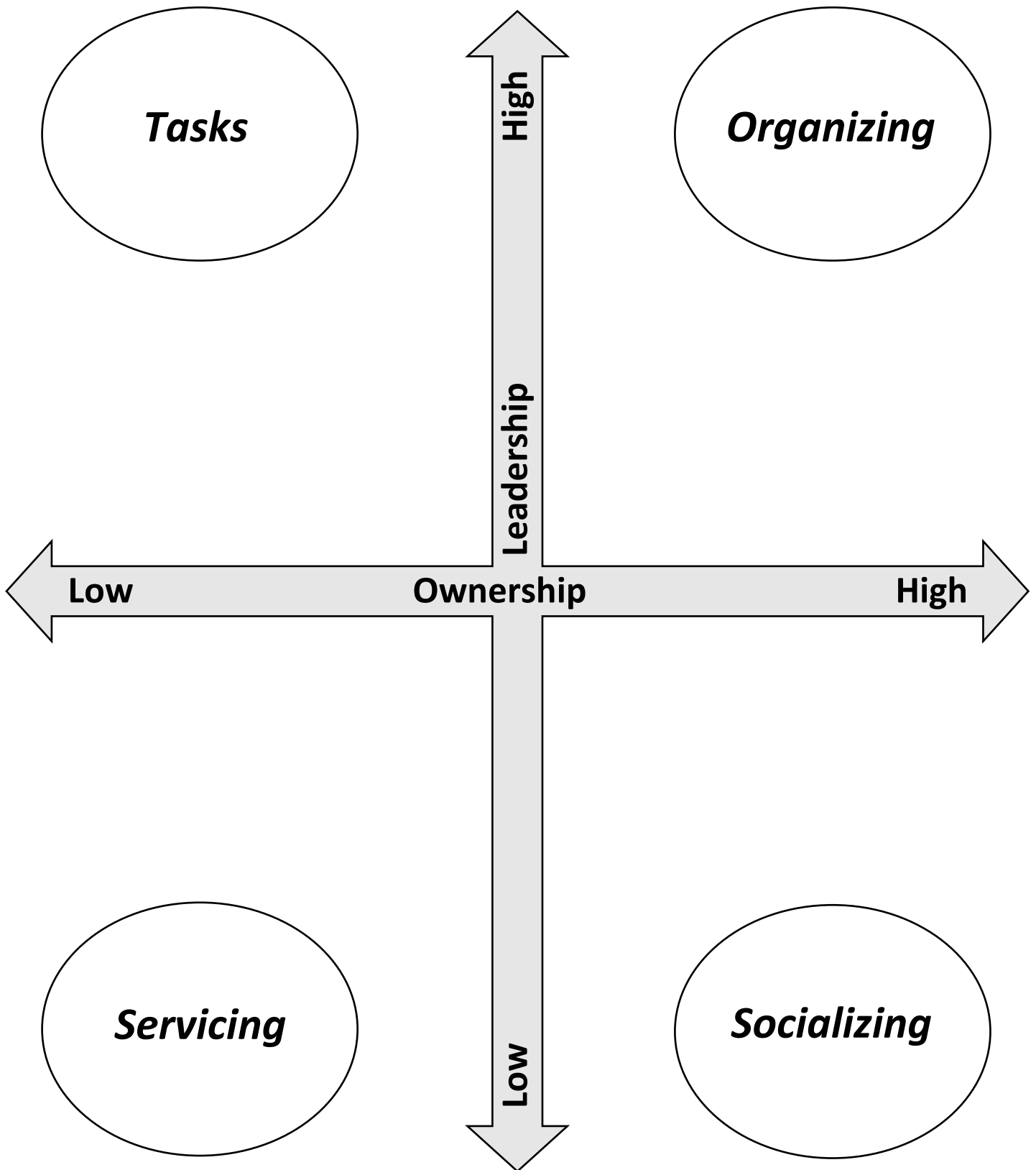
It is time for all us heroes to go home because, if we do, we'll notice that we're not alone. We're surrounded by people just like us. They too want to contribute, they too have ideas, they want to be useful to others and solve their own problems.

Truth be told, they never wanted heroes to rescue them anyway.

Parts of this article are excerpts from *Walk Out Walk On: A Learning Journey Into Communities Daring to Live the Future Now*. Margaret Wheatley & Deborah Frieze. Berrett-Koehler Publishers, Forthcoming April 2011.

## Engagement Grid

John Donaghy, Executive Director, Seattle Education Association



## Ladder of Engagement

Hahrie Han wrote that the Ladder of Engagement is “the difference between organizing events and organizing organizers” (2015).

When we’re bringing people into our unions we want to think about how we can constantly scale up our engagement from making them aware all the way up the ladder to planning the work of the union. Each step of the ladder allows more and more engagement and loyalty in the shared values and campaigns. It is this increased engagement that allows people to build their capacity to lead in more and more ways.

The most trusted and credible of union leaders are found at the top of the ladder. They are responsible for the continual recruitment of people to the ladder and the work of moving people up the ladder. Divvying up the important responsibility of recruitment and engagement building across leaders AND making it clear that their work is needed they’ll respond with their commitment to the Union. Ultimately, the Ladder of Engagement is about building leaders.

What are the kinds of actions that your local does at each level of the ladder to grow and develop people towards higher levels of leadership? How many people would you say you have represented at each level of the ladder?

|            |  |
|------------|--|
|            |  |
| Planning   |  |
| Coaching   |  |
| Partnering |  |
| Included   |  |
| Hooked     |  |
| Activated  |  |
| Intrigued  |  |
| Interested |  |
| Aware      |  |
| Unaware    |  |
|            |  |



# Organizing 2 Bargain



## Module 4 – What are Our People Willing to Do?

Thinking of UniServ work as a set of campaign plans helps to refocus the day to day demands of service providing to the longer term work of organizing. A strong campaign plan results in visible wins for the union, develops more leader, attracts more members, and allows for a collective use of resources to win meaningful change. The frameworks in this toolkit will help you in making an effective campaign design with leaders and members.

**Institute Facilitator**  
Ellen Holmes, NBCT  
[eholmes@nea.org](mailto:eholmes@nea.org)

# A Plan for Organizing 2 Bargain

## Story - Issue and Win

What is the story you want people to tell about your Local and this campaign?

**Our story is ...**

|  |
|--|
|  |
|--|

What is the issue that you will organize around? What do your people want to change?

**Our issue is...**

|  |
|--|
|  |
|--|

What would it look like if you achieved positive change on this issue? This is a concrete goal that can be measured and has a date. This win will directly address the issue and make a significant, visible change in the lives of your people. It “proves” the story you want to tell.

**Our win is...**

|  |
|--|
|  |
|--|

### Core Leadership Team (Structure) Members

Who are the key people that will lead the actions and shape the plan?

[illegible]

## Resources

What resources will you be able to use to gain power and work towards your win?

- **People** - Specific and intentionally identified people who can help you achieve the change you want to see. \*\*May be exhaustible. \*\*
- **Expertise** - Key, specialized knowledge that is used to support the change you want to see. Where is it, how do you get it, how do you communicate it, how do you use it?
- **Durable** - Does not go away (meeting space, research)
- **Exhaustible** - One time use, need to be replenished, need a sustainability plan (money, time)

| People                |
|-----------------------|
|                       |
| Expertise             |
|                       |
| Durable Resources     |
|                       |
| Exhaustible Resources |
|                       |

**Overall Strategic Planner**

- What foundation do you need to build before beginning your plan (recruit leaders, gather resources, etc.)?
- What will you do to kick-off your campaign and gear up for the first tactic?
- What tactics will you take to reach the win? What structures will you build around each tactic?
- How will measure BOTH growth and strength at each step?

|                   |  |  |
|-------------------|--|--|
| <b>Foundation</b> |  |  |
| <b>Kick-off</b>   |  |  |
| <b>Tactic 1</b>   |  |  |
| <b>Tactic 2</b>   |  |  |
| <b>Tactic 3</b>   |  |  |
| <b>Tactic 4</b>   |  |  |
| <b>Tactic 5</b>   |  |  |
| <b>Win</b>        |  |  |

| Kick-Off                                                           |  |
|--------------------------------------------------------------------|--|
| Kick-Off Goal                                                      |  |
| Leaders/ Structures                                                |  |
| Participants                                                       |  |
| Date(s)                                                            |  |
| Location(s)                                                        |  |
| Recruitment and Communication Plan                                 |  |
| Resources and Supplies                                             |  |
| Measurable Growth and Strength Data (Qualitative and Quantitative) |  |

| Debrief |
|---------|
|         |

| Tactic 1                                                                  |  |
|---------------------------------------------------------------------------|--|
| <b>Tactical Goal</b>                                                      |  |
| <b>Leaders/ Structures</b>                                                |  |
| <b>Participants</b>                                                       |  |
| <b>Date(s)</b>                                                            |  |
| <b>Location(s)</b>                                                        |  |
| <b>Recruitment and Communication Plan</b>                                 |  |
| <b>Resources and Supplies</b>                                             |  |
| <b>Measurable Growth and Strength Data (Qualitative and Quantitative)</b> |  |

| Debrief |
|---------|
|         |

| Tactic 2                                                                  |  |
|---------------------------------------------------------------------------|--|
| <b>Tactical Goal</b>                                                      |  |
| <b>Leaders/ Structures</b>                                                |  |
| <b>Participants</b>                                                       |  |
| <b>Date(s)</b>                                                            |  |
| <b>Location(s)</b>                                                        |  |
| <b>Recruitment and Communication Plan</b>                                 |  |
| <b>Resources and Supplies</b>                                             |  |
| <b>Measurable Growth and Strength Data (Qualitative and Quantitative)</b> |  |

| Debrief |
|---------|
|         |



| Tactic 3                                                                  |  |
|---------------------------------------------------------------------------|--|
| <b>Tactical Goal</b>                                                      |  |
| <b>Leaders/ Structures</b>                                                |  |
| <b>Participants</b>                                                       |  |
| <b>Date(s)</b>                                                            |  |
| <b>Location(s)</b>                                                        |  |
| <b>Recruitment and Communication Plan</b>                                 |  |
| <b>Resources and Supplies</b>                                             |  |
| <b>Measurable Growth and Strength Data (Qualitative and Quantitative)</b> |  |

| Debrief |
|---------|
|         |

| Tactic 4                                                                  |  |
|---------------------------------------------------------------------------|--|
| <b>Tactical Goal</b>                                                      |  |
| <b>Leaders/ Structures</b>                                                |  |
| <b>Participants</b>                                                       |  |
| <b>Date(s)</b>                                                            |  |
| <b>Location(s)</b>                                                        |  |
| <b>Recruitment and Communication Plan</b>                                 |  |
| <b>Resources and Supplies</b>                                             |  |
| <b>Measurable Growth and Strength Data (Qualitative and Quantitative)</b> |  |

| Debrief |
|---------|
|         |

| Tactic 5                                                                  |  |
|---------------------------------------------------------------------------|--|
| <b>Tactical Goal</b>                                                      |  |
| <b>Leaders/ Structures</b>                                                |  |
| <b>Participants</b>                                                       |  |
| <b>Date(s)</b>                                                            |  |
| <b>Location(s)</b>                                                        |  |
| <b>Recruitment and Communication Plan</b>                                 |  |
| <b>Resources and Supplies</b>                                             |  |
| <b>Measurable Growth and Strength Data (Qualitative and Quantitative)</b> |  |

| Debrief |
|---------|
|         |

## Organizing 2 Bargain



### Additional Resources

Thinking of UniServ work as a set of campaign plans helps to refocus the day to day demands of service providing to the longer term work of organizing. A strong campaign plan results in visible wins for the union, develops more leader, attracts more members, and allows for a collective use of resources to win meaningful change. The frameworks in this toolkit will help you in making an effective campaign design with leaders and members.

**Institute Facilitator**  
Ellen Holmes, NBCT  
[eholmes@nea.org](mailto:eholmes@nea.org)

# ORGANIZING: PEOPLE, POWER, CHANGE



## Acknowledgements

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Design and photography by Shelby Tay.

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# **ORGANIZING:** **PEOPLE, POWER, CHANGE**

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# Foreword

*Hello and welcome!*

The following guide aims to support you in developing your capacity for effective community organizing. Our goal is to provide you with an introduction to organizing and encourage you to explore answers to the following questions:

Why am I called to leadership in my community? How will I move others to join me? How will we develop strategy and structure our work together? And how will we achieve our goals?

To start, here's how we define **leadership**:

Leadership is accepting responsibility for enabling others to achieve purpose in the face of uncertainty.

Here's how we define **organizing**:

Organizing is leadership that enables people to turn the resources they have into the power they need to make the change they want.

And we break down this definition further by describing the **five key practices of organizing**: telling stories, building relationships, structuring teams, strategizing, and acting. Taken together, these five practices form the basis of the organizing framework laid out in this guide. We'll refer to the above definitions throughout the guide, and unpack what they mean in depth as we work through the organizing framework. **But where does this 'framework' come from?**

Much of this framework was codified by a fellow called Marshall Ganz. Ganz developed the "Public Narrative" framework (see the Telling Stories section) based on years of organizing in and research on social movements. He cut his teeth as a young organizer in the Civil Rights movement, worked with the United Farm Workers in the 1960s and 70s, advised many unions, non-profits, and political organizations for decades, and was a key trainer and organizing strategist behind the U.S. presidential campaigns of 2008 and 2012.

It was during these campaigns that Ganz and fellow organizers (note: *millions* of other organizers) built on community organizing best practices and techniques

from past movements and codified an approach to grassroots organizing and training that many credit with winning the 2008 election. Many organizations, including Leading Change Network and New Organizing Institute, spawned or grew out of these successful campaigns, and most of this guide is adapted from their resources.

Many people and organizations paid close attention to what these American organizers were doing, and some were inspired to shift their approach and adapt this framework. Over the last several years, several organizations in Canada (and British Columbia / Coast Salish Territories, in particular) have begun to shift their strategies to focus on community organizing (that is, putting people and relationships at the centre of the work), modelled after Ganz and American campaigns. That's not to say that local movements or efforts or organizations haven't been working in this relationship-based way for a long time; they just might not take inspiration from the work of Marshall Ganz or credit themselves as 'organizers' in the same way.

Some call this framework the "snowflake model," others "distributed leadership," and still others "the Ganz model." Whatever we choose to call it, we hope to emphasize here that this approach is based in years and years of community organizing - we're truly 'standing on the shoulders of giants' employing this organizing framework, today.

In reading this guide, we ask that you keep two things in mind:

1. Remember that organizing is **above all a practice**. We learn to organize by organizing, not (just) by reading about it. This guide is meant to get you started and serve as a resource, but the best way to learn this framework is to get out and do it!
2. This organizing framework is just that, **a framework, not a formula**. Our goal here is to present some concepts and tools that many organizers have found to be effective and, at times, have been instrumental in winning campaigns.

We hope you find it useful.

Sincerely,

Shea Sinnott and Peter Gibbs,  
Vancouver & Victoria, BC / Coast Salish Territories  
October 2014



# Introduction to Organizing

## Key Concepts

- Organizing is **leadership** that enables people to turn the resources they have into the power they need to make the change they want.
- Organizing is a practice, and there are **five key leadership practices** within this practice: telling stories, building relationships, structuring teams, strategizing, and acting.
- The first question an organizer asks is “**who are my people?**” not “what is my issue?”
- Strong **relationships** are the foundation of successful organizing efforts.
- The **snowflake model** is an organizational structure that embodies leadership as that which enables others to achieve shared purpose in the face of uncertainty.

## What is Organizing?

Organizing is leadership that enables people to turn the resources they have into the power they need to make the change they want. As we'll learn throughout this guide, community organizing is all about people, power, and change – it starts with people and relationships, is focused on shifting power, and aims to create lasting change. Organizing people to build the power to make change is based on the mastery of five key leadership practices: telling stories, building relationships, structuring teams, strategizing, and acting. That is, to develop our capacity for effective community organizing, we must learn:

### The Five Leadership Practices

1. How to articulate a **story** of why we are called to lead, a story of the community we hope to mobilize and why we're united, and a story of why we must act.
2. How to build intentional **relationships** as the foundation of purposeful collective actions.
3. How to create **structure** that distributes power and responsibility and prioritizes leadership development.
4. How to **strategize** turning your resources into the power to achieve clear goals.
5. How to translate strategy into measurable, motivational, and effective **action**.

Though organizing is not a linear process, organizers use the first three practices (stories, relationships, structure) to build power within a community, while the last two practices (strategy, action) are about wielding that power in order to create change.

“A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.”

– Lao Tzu

## People

The first question an organizer asks is “Who are my people?” not “What is my issue?” Effective organizers put people, not issues, at the heart of their efforts. Organizing is not about solving a community’s problems or advocating on its behalf. It is about enabling the people with the problem to mobilize their own resources to solve it (and keep it solved).

Identifying a community of people is just the first step. The job of a **community** organizer is transform a community – a group of people who share common values or interests – into a constituency – a community of people who are standing together to realize a common purpose. The difference between community and **constituency** lies in the **commitment** to take action to further common goals.

For example, a community could be residents of a town that are against a new dam project, while a constituency would be residents of the town against the dam who have signed a petition to take action to stop the dam from being built.

## Power

Organizing focuses on power: who has it, who doesn’t, and how to build enough of it to shift the power relationship and bring about change. Reverend Martin Luther King described power as “the ability to achieve purpose” and “the strength required to bring about social, political and economic change.”<sup>1</sup>

In organizing, power is not a thing or trait. Organizers understand power as the influence that’s created by the relationship between interests and resources. Here, **interests** are what people need or want (e.g. to protect a river, to stay in public office, to make money), while **resources** are assets (e.g. people, energy, knowledge, relationships, and money) that can be readily used to, in the case of organizing, achieve the change you need or want. Understanding the nature of power – that it stems from the interplay between interests and resources – and that we must shift power relationships in order to bring about change, is essential for the success of our organizing efforts.

From the example above, the constituency against the dam may ask questions aimed at ‘tracking down the power’ – that is, inquiring into the relationship between actors, and particularly the interests and resources of these actors in their struggle. For instance, they might ask questions like: *what are our interests, or, what do we want? Who holds the resources needed to address these interests? What are their interests, or, what do they want?*

In doing so, the town residents may realize that their local town council is a key actor, that local councillors want to stay in office and need votes to do so, and in turn, the constituency holds the resources of people, relationships, and votes that could shift this power relationship and bring about change.

---

<sup>1</sup> King, Martin Luther, Jr. (1967). “Where Do We Go From Here?” Annual Report Delivered at the 11th Convention of the Southern Christian Leadership Conference, Atlanta, GA. Retrieved from [http://www-personal.umich.edu/~gmarkus/MLK\\_WhereDoWeGo.pdf](http://www-personal.umich.edu/~gmarkus/MLK_WhereDoWeGo.pdf)

## Change

In organizing, change must be specific, concrete, and significant. Organizing is not about 'raising awareness' or speech-making (though these may contribute to an organizing effort). It is about specifying a **clear goal** and mobilizing your resources to achieve it.

Indeed, if organizing is about enabling others to bring about change, and specifically, securing commitment from a group of people with shared interests to take action to further common goals, then it's critical to define exactly what those goals are.

In the case of the proposed dam project from above, the constituency against the dam must create clear, measurable goals. Note the difference between "our goal is to stop the dam" versus "our goal is to put pressure on town council in the next 3.5 months - through door-knocking, events, and local newspaper op-eds aimed at getting  $\frac{1}{3}$  of town residents to sign our petition - to pass a motion to stop the dam project."

You'll learn how to come up with goals in the Strategizing section and how to achieve them in the Acting section.

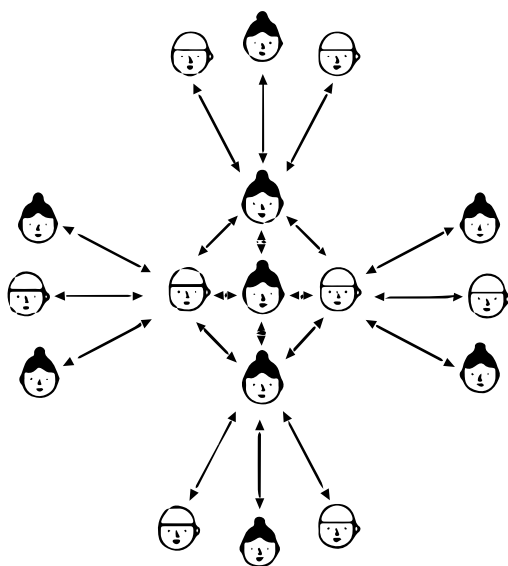
## The Snowflake Model: A distributed approach to leadership

We define leadership as accepting responsibility for enabling others to achieve purpose in the face of uncertainty, and the organizational model that best embodies this understanding of leadership is what we call the "**snowflake model**."

First, in the snowflake model, **leadership is distributed**. No one person or group of people holds all the power; responsibility is shared in a sustainable way, and structure aims to create mutual accountability. The snowflake is made up of interconnected teams working together to further common goals.

Second, the snowflake model is based above all on enabling others. A movement's strength stems from its capacity and **commitment to develop leadership** and in the snowflake model, everyone is responsible for identifying, recruiting, and developing leaders. Leaders develop other leaders who, in turn, develop other leaders, and so on.

The practise of coaching is the key means by which organizers in the snowflake develop leadership. See the Coaching section for more details on what coaching in organizing is and how to practise your coaching skills.



You'll learn about the snowflake model in greater detail in the Structuring Teams section, but for now, reflect on the organizational structures that you've been a part of in your work, school, or other areas of your life. How might you draw out those structures? Where did you fit into those structures, and how did you feel in your role?

Now, take a look at diagram 1. Note the faces, the clusters of faces, and the links between them. How might the snowflake model compare to the structures you've been a part of in the past? As you'll see in the Structuring Teams section, the snowflake model is unique from typical organizing or leadership structures in that responsibility is distributed and it prioritizes leadership development above all.

In closing, keep the snowflake model structure and the core tenets of people, power, and change in mind as we dive deeper into the the five practices of organizing: telling stories, building relationships, structuring teams, strategizing, and acting.

## Further Reading

Ganz, M. (2010). "Leading Change: Leadership, Organization, Social Movements." In N. Nohria & R. Khurana (Eds.), *the Handbook of Leadership Theory and Practice* (pp. 509-550). Danvers: Harvard Business School Press.

For a full list of writings by Marshall Ganz, visit <http://marshallganz.com/publications>

For readings and training resources from the New Organizing Institute, visit <http://neworganizing.com/toolbox>

# Telling Stories

## Key Concepts

- We tell stories in organizing to communicate our **values** and to motivate people to take action.
- A story structure is made up of three elements: plot, character, and moral, but a story comes alive when the character faces a **challenge**, makes a **choice**, and experiences the **outcome**.
- The **Public Narrative** framework is comprised of a Story of Self, a Story of Us, and a Story of Now, and learning to craft and re-craft your Public Narrative is a leadership practice.

## Storytelling in Organizing

We turn to storytelling in organizing to answer the question of “why?” – why we care, why the work that we do matters, why we value one goal over another. Most of us don’t do this work because of a list of facts, and rattling off statistics isn’t usually an effective means of recruiting ordinary people to stand up against injustice. Instead, we’re here because of our values; the desire to make change stems from beliefs like fairness, equality, democracy, or environmental sustainability.

Storytelling allows us to communicate our values, and in organizing, **we use stories to articulate our shared values**. Stories can be a source of inspiration, a means to engage and connect with one another, and most importantly, a way to motivate others to join us. That is, in order to motivate others to join us in making change, we need to identify and articulate our shared values in a way that spurs us to take action, together. The most effective way to do that is by telling stories.

Remember that storytelling is not synonymous with ‘speech-making.’ It is a practise we use in many different contexts, not just from a stage at a rally. For example, stories are also told when recruiting a new team member, or when debriefing with a volunteer who had a hard shift. Specifically, an organizer may ask a new team member – *why did you choose to get involved in this campaign? or can you tell me more about why you’re here today?* – in order to hear a little of the volunteer’s story. In turn, the organizer might share a bit of their story, for the purpose of building connection, and, hopefully, motivating the volunteer to take further action on the campaign.

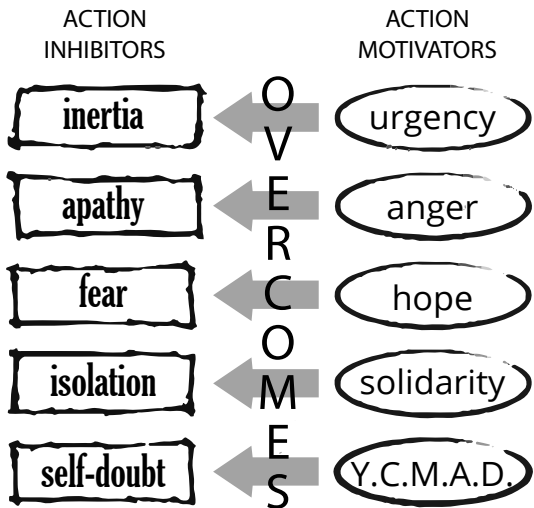
Each of us can learn to tell a story that can move others to action. We all have stories of challenge and of hope, or we wouldn’t think the world needed changing or think that we could change it. The trick is to articulate a story that communicates the values that have called us to leadership, the values that unite us, and the challenges that we must overcome together; in this section, we’ll explore a framework for storytelling called “Public Narrative” that revolves around those three elements – a Story of Self, Us, and Now.

“If I am not for myself, who will be for me? If I am only for myself, what am I? And if not now, when?”

– Hillel (Pirkei Avot Chapter 1:14)

## Emotions

The key to motivation is understanding that **values inspire action through emotion**. Stories enable us to communicate our feelings about what matters, so compelling stories are not overly abstract or intellectual, they're about real-life experiences that have the power to move others.



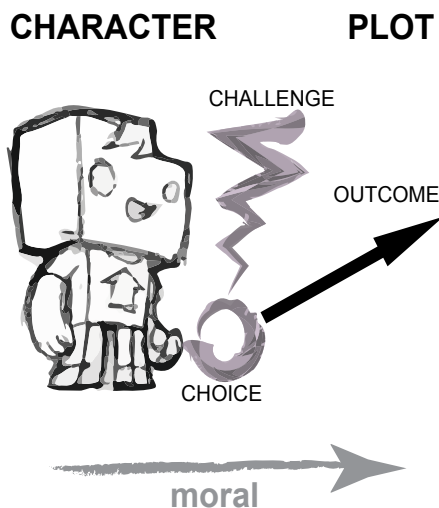
Again, storytelling in organizing is all about inspiring action, and leaders must learn to **mobilize the emotions that make agency possible**. As diagram 2 illustrates, some emotions inhibit action, while other emotions facilitate action. Action is inhibited by feelings of inertia, apathy, fear, isolation, and self-doubt, while action is facilitated by feelings of urgency, anger, hope, solidarity, and the feeling that “you can make a difference” (or, Y.C.M.A.D.).

For instance, fear can paralyze us and drive us to rationalize inaction. Amplify this fear by feelings of self-doubt and isolation and people become victims of despair. On the other hand, hope can overcome fear, and in concert with self-esteem (Y.C.M.A.D.) and love (solidarity), these emotions can move us to act.

Effective storytellers learn how to adapt their stories to different audiences by tapping into the emotions their listeners are feeling at the time, and then evoking mobilizing emotions they deem timely or relevant to motivate them to act.

## Structure: Challenge, Choice, Outcome

If you reflect on stories you've heard or remember most vividly, you'll probably notice that stories have similar structural elements. That is, a story is usually crafted of just three things: plot, character, and moral.



But what makes a story a story, rather than the recounting of an event? **Challenge, choice, and outcome**. A story begins with a challenge that confronts a character and demands that they make a choice, and this choice yields an outcome. Stories capture our interest when the character meets an unexpected challenge; listeners lean in when presented with tension, uncertainty, or the unknown. Challenges, choices, and outcomes are the structural elements that make stories come alive.

Remember, **stories are about people**. The storyteller engages an audience when they make them identify with the character in the story. As a storyteller, the goal is to create empathy between listener and character so that, hopefully, listeners are encouraged to think about their own challenges and choices. Even further, the goal is to get listeners to experience or feel the outcome of the character's choices (a 'lesson of the heart') and not just understand it (a 'lesson of the head').

## Public Narrative

Marshall Ganz created the Public Narrative framework based on the stories told by social movement leaders and his understanding of the need for social movements to “tell new public stories.”<sup>2</sup> As Ganz has written:

Through public narrative, social movement leaders – and participants – can move to action by mobilizing sources of motivation, constructing new shared individual and collective identities, and finding the courage to act.<sup>3</sup>

The Public Narrative framework is made up of three components: **a Story of Self, a Story of Us, and a Story of Now**. A Story of Self communicates the values that have called you to leadership; a Story of Us communicates the values shared by those in action; a Story of Now communicates an urgent challenge to those values that demand action now. Note the quotation from Hillel in the opening to this section: “If I am not for myself, who will be for me? If I am only for myself, what am I? And if not now, when?” (*Pirkei Avot* Chapter 1:14).

Simply put, Public Narrative says, “Here’s who I am, this is what we have in common, and here’s what we’re going to do about it.” By mastering the practise of crafting a narrative that bridges the self, us, and now, organizers enhance their own efficacy and create trust and solidarity with their constituency.



<sup>2</sup> Ganz, M. (2010). “Leading Change: Leadership, Organization, Social Movements” (pp. 526).

<sup>3</sup> Ibid, pp. 527.

## Story of Self

Telling your Story of Self is a way to communicate who you are, the choices that have shaped your identity, and the values you hold that influenced those choices. Learning to tell a compelling, emotive Story of Self demands the courage of introspection, and even more courage in sharing what you discover.

We construct our stories of self around “**choice points**” – moments when we faced a challenge, made a choice, experienced an outcome, and learned a lesson. Ask yourself: *when did I first care about being heard? When did I first experience injustice? When did I feel I had to act and what did I do?*

Once you identify a specific, relevant choice point, dig deeper and ask yourself: *what was the outcome of this choice and how did it feel? What did it teach me?*

Some of us may think that our personal stories don’t matter or that others won’t care to hear them. Yet if we do community or social change work then we have a responsibility to give a public account of ourselves – where we come from, why we do what we do, and where we think we’re going. What’s more, if we don’t author our own stories, others might do it for us (and in ways we may not like).

In developing your Story of Self, reflect on these questions

1. Why am I called to leadership?
2. Why did I decide to tackle this specific injustice or problem and work on this organizing effort?
3. What values move me to act? Have these values always been important to me? If not, when did that change? How might these values inspire others to similar action?
4. What stories can I tell from my own life about specific people or events that would show, rather than tell, how I learned or acted on those values?

For more help with developing your Story of Self and full Public Narrative see page 42.



## Story of Us

A Story of Us expresses the values and shared experience of the 'us' you want to evoke at the time. This means our 'us' can and will change depending on who we're speaking to. The goal is to create a sense of unity, togetherness, and focus on the shared values of your listeners.

Similar to a Story of Self, a Story of Us focuses on choice points, but this time, the character in your Story of Us is the **community you are motivating to act**, and the choices are those the community has faced. That said, a compelling Story of Us doesn't just highlight challenges, it also lifts up stories of success to give people hope. As Ganz writes, "Hope is one of the most precious gifts we can give each other and the people we work with to make change."<sup>4</sup>

In developing your Story of Us, reflect on these questions

1. What values do you share with this community? (note: community here is the 'us' in your story)
2. What experiences have had the greatest impact on this community? What challenges has it faced?
3. What change does this community hope for and why?

For more help with developing your Story of Us and full Public Narrative see page 42.

## Story of Now

A Story of Now articulates the **urgent challenge** your 'us' faces and the threat to your shared values that demands immediate action. In your Story of Now, paint the picture of what the future looks like if we fail to act now (the 'nightmare') and what the future could be if we act together (the 'dream').

Lastly, a Story of Now makes the bridge from story, *why* we should act, to strategy, *how* we can act. Specifically, your Story of Now should end with a "hard ask" (see the Building Relationships section for what this is). It's up to you to both motivate your listeners to take action and give them a specific, concrete way to take action.

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<sup>4</sup> Ganz, M. (2009). Why Stories Matter: The Art and Craft of Social Change. Sojourners. Retrieved from <http://www.sojournal.net/magazine/2009/03/why-stories-matter>

In developing your Story of Now, reflect on these questions

1. What is the urgent challenge your 'us' faces?
2. What change does this community hope for and why? What would the future look like if this change is made? What would the future look like if the change isn't made? (note: here, you're trying to paint a picture of the 'dream' of the future if the change is made, and the 'nightmare' of the future if it isn't.)
3. What choice are you asking people to make and why now?
4. What action are you asking them to take and what impact will this have on the bigger picture? What's the risk, or again, what would the future look like if we fail to act?

For more help with developing your Story of Now and full Public Narrative see page 42.

When woven together, your Public Narrative should present a plan for how to overcome the challenge at hand and give your listeners an opportunity to join you in taking action. In closing, remember that storytelling in organizing is a leadership practice above all and is a means of connecting, inspiring, and motivating one another to work together to create change.

As you listen to others' Public Narratives, reflect on the following questions

1. What values did the speaker's story convey?
2. What details reflected those values?
3. What was the challenge, choice, and outcome in each part of their story?
4. What did the character in the story learn from those outcomes?
5. What was the speaker moving people to do?

For a more comprehensive guide to listening to and coaching others in telling stories, see the worksheet on page 46.

## Further Reading

Ganz, M. (2009). *Why Stories Matter: The Art and Craft of Social Change*. Sojourners. Retrieved from <http://www.sajo.net/magazine/2009/03/why-stories-matter>

Ganz, M. (2011). "Public Narrative, Collective Action, and Power." In S. Odugbemi and T. Lee (Eds.), *Accountability Through Public Opinion: From Inertia to Public Action* (pp. 273-289). Washington, DC: The World Bank.

Sachs, J. (2012). *Winning the story wars: why those who tell-and live-the best stories will rule the future*. Boston: Harvard Business Review Press.

# 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.



# Coaching: Enabling Others

## Key Concepts

- Coaching is key for **leadership** development; the goal of coaching is to help people find their own solutions to meet challenges, and the role of the coach is to ask questions to get people to uncover the answers in themselves.
- Coaching can be thought of as a **five-step process** – inquire & observe, diagnose, intervene, action, and check-in – and these five steps provide a simple framework for effective coaching in organizing.
- Developing a **culture of coaching** is key for building effective teams.

## What is coaching?

If organizing is leadership that enables people to turn their resources into the power they need to make the change they want, then **coaching is about enabling others**. In trying to create change, organizers will undoubtedly run into challenges, as failure, conflict, and obstacles are often inevitable in our campaigns. Coaching is a means of helping individuals and teams work through these challenges.

The role of the coach is to **help people find their own solutions**; rather than offering advice, coaches ask questions to get people to uncover the answers in themselves and use their own resources to meet challenges. The purpose of coaching is to enable others to build their own capacity to act, so they can coach others, and so on. In this way, coaching is synonymous with **leadership development** and so is key for building scalable, sustainable teams.

In organizing, coaching usually takes the form of an intervention (note that the process usually starts with a conversation) in an individual or team's work to support the coachee(s) in improving their effectiveness. Read on for more details on effective coaching and the coaching process.

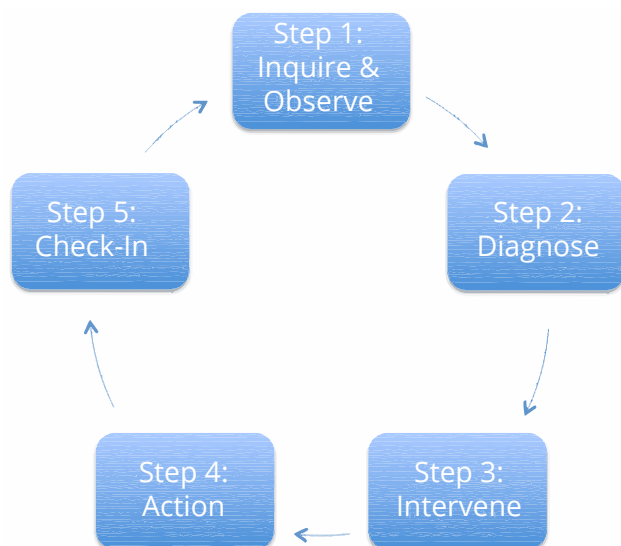
Maintenance 1:1s are the primary opportunity to coach an organizer. See the Building Relationships section for more information on what these are, how frequently they are practiced, and why.

# Effective Coaching

| Coaching is...                                                                                | Coaching is not...                                                                                                               |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Being present and listening.                                                                  | Providing solutions before hearing / observing the obstacles.                                                                    |
| Providing a space for your coachee to speak and be heard.                                     | Being an expert or having all the answers.                                                                                       |
| Asking questions that both support and challenge the person you are coaching.                 | Telling the coachee what to do.                                                                                                  |
| Helping the coachee explore their challenges and successes.                                   | False praising the coachee because you don't want to hurt their feelings or solely criticizing the coachee for their weaknesses. |
| Empowering the coachee to identify resources and find solutions to the challenges themselves. | Identifying the challenge and coming up with the solution yourself.                                                              |

## Coaching: A Five-Step Process

There are five steps in the coaching process. While contexts vary, these five steps provide a simple framework for effective coaching in organizing.



### 1. Inquire & Observe

When you are observing a coachee's actions or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. Instead, be present with the coachee and **start by listening**, asking questions, and closely observing what they say and do so that you can both dig deeper into the challenge(s) at hand. *Ask yourself: what do I see and hear?*

For example, is the coachee failing to plan or evaluate tactics that meet shared goals? Is the coachee articulating feelings of frustration or fatigue regarding canvassing? Is the coachee struggling to complete routine tasks correctly or on time?

Remember, challenges aren't always obvious, and, sometimes, the bulk of the coach's work is simply supporting the coachee in discovering the nature of the obstacle they're facing. One skill to help both coach and coachee uncover the challenge(s) is called "**backtracking**." Here are some sample backtracking statements and questions:

"Let me be clear about this..."

"Let me see if I've got this right..."

"What I'm hearing you say is \_\_\_\_\_. Is that right?"

### 2. Diagnose

Challenges in organizing usually fall into one or more of the following three categories: strategic, motivational, and skills challenges – or "**head, heart, hands**" – and how you coach depends on the nature of the challenge. *Ask yourself: what is the nature of the challenge and how will I intervene?*

Coaching is not only about addressing challenges and problem-solving. Inquisitive coaching – that is, asking questions with the aim of supporting people in uncovering their own answers – is an invaluable practice in developing our stories and devising strategy. Specifically, see the Coaching Stories worksheet on page 46 for information on how coaching can help in developing our stories. On the other hand, asking coaching questions about strategic goals can be an effective way of supporting people in devising effective strategy.

From the examples above, if the coachee is failing to plan or evaluate tactics that meet shared goals, you might focus on the coachee's understanding of **strategy** (head) and invite them to a planning meeting. On the other hand, if the coachee is articulating feelings of frustration or fatigue in going canvassing, you might focus on the coachee's **motivation** (heart) and offer encouragement. Lastly, if the coachee is struggling to complete routine tasks correctly or on time, you might focus on the coachee's **skills** (hands) and offer learning or practise to make sure they have mastery over their responsibilities.

### 3. Intervene

Now it's time to gently push the coachee to **create a plan for moving forward**. This plan should take the form of specific, timely steps the coachee will take to address the challenge(s) articulated in Step 2. Here are some sample questions you could ask the coachee in order to come up with next steps:

"If you knew you wouldn't fail, what would you do?"

"How will you put this new information into practice?"

"What is the very next step in moving forward?"

"What resources and support do you need to accomplish this task?"

"When will you do this by?"

### 4. Action

Next, step back and **observe the coachee in action**. Give them time and space to take steps to address their challenge(s). Avoid the urge to do it for them.

### 5. Check-in

Now it's time to **hold the coachee accountable** and support them in debriefing what happened. *Ask yourself: how do I help the coachee in reflecting on their experience?*

Assess whether the diagnosis of the challenge and intervention (i.e. the coachee's plan) were successful. You may realize that you need to repeat Steps 1-4 and support the coachee in coming up with a different plan for addressing the same challenge, or, it's time to celebrate success!

And next, start again! Nurturing a "**culture of coaching**" – whereby organizers are consistently and constantly enabling others to find solutions to meet challenges – is fundamental to leadership development in organizing.

### Further reading

Hackman, R and Wageman, R. (2005). A Theory of Team Coaching. *Academy of Management Review*, 30:2, 269-287. <http://amr.aom.org/content/30/2/269.abstract>

Gawande, A. (2011). Personal Best. *The New Yorker*. <http://www.newyorker.com/magazine/2011/10/03/personal-best>

# Structuring Teams

## Key Concepts

- **Teams** are critical to organizing, in part because they **deepen relationships** that help us commit to action.
- Effective teams require **shared purpose, interdependent roles, and explicit norms**.
- The **snowflake model** is defined by mutual accountability and commitment, a sustainable number of relationships, clearly defined roles, and capacity for exponential growth.
- The **“ladder of engagement”** can help us effectively and gradually guide a supporter into becoming a leader.

## Why Organize in Teams?

Once again, organizing is leadership that enables people to turn the resources they have into the power they need to make the change they want. The snowflake model is the structure that best suits this approach to building power, and **working in teams is critical** to effective organizing in the snowflake model.

But first, why organize in teams? First and foremost, working in teams is **more fun** than working alone! Teammates also offer **support and mentorship** to one another, which play a key role in leadership development. People who feel supported and who enjoy what they’re doing are more likely to keep doing it. Next, by working in teams, we can **meet higher goals** by tapping into the diverse range of resources (including skills and knowledge) multiple people bring. And most importantly, by working in teams, we **develop relationships** with fellow teammates that facilitate and deepen our commitment to taking action.

## What do effective teams have in common?

Effective teams usually have three elements in common: shared purpose, interdependent roles, and explicit norms.

### Shared Purpose

We can’t start building an organization without a clear mission. A team must be clear on what it has been created to do (purpose) and who it will be doing it with (constituency). Its purpose should be clear and easy-to-understand, while it must also be challenging and significant to those on your team. Team members should be able to articulate their shared purpose.

A compelling organizing purpose is a response to injustice. The first step in articulating shared purpose is to identify the people you are organizing – your specific constituency, or, the community of people who are standing together to realize a common purpose.

Shared purpose should also be measurable: your team needs clear goals in order to measure progress.

Your Story of Now (or that of the team or group you’re working with) is one way to think about shared purpose. See the Telling Stories section for information on crafting your Public Narrative.

## Interdependent Roles

Each team member must have responsibility, or, their own piece of work that contributes to bigger goals. In an effective team, **no one works in a silo**. A functioning team will have a diversity of identities, experiences, and opinions to ensure that the most possible is being brought to the table.

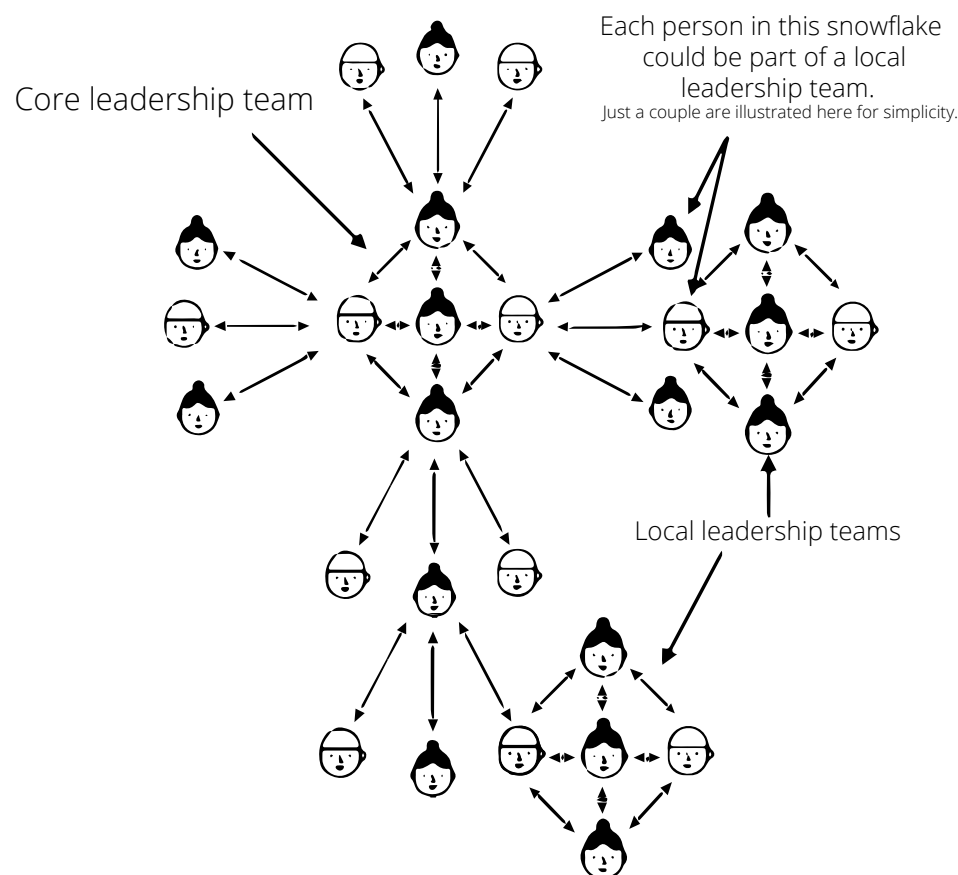
## Explicit Norms

Your team should **set clear expectations** for how to govern itself. How will you manage meetings, regular communication, decisions, and commitments? And, most importantly, how will you correct ground-rule violations so that they remain active and legitimate ground rules?

Teams with explicit operating rules are more likely to achieve their goals. Some team norms are operational, such as – *How often will we meet? How will we share and store documents? How will we communicate with others outside the team?* – while others address expectations for member interaction. Setting norms early on in team formation will guide your team in its early stages as members learn how to work together. Making norms explicit allows your team to have open discussions about how things are going. The team can update and refine norms as they work together to improve working relationships.

## The Snowflake Model: Interconnected teams

The snowflake model is defined by its distribution of leadership and by its commitment to leadership development. **Relationships are the glue** that hold the snowflake together, and these relationships support the **interconnected teams** that make up the snowflake. Read on for more information on the key elements of the snowflake.



## Distributed leadership: core and local leadership teams

In the snowflake model, decision-making responsibility is decentralized whenever possible. The core leadership team ensures the whole organization is coherent and effectively moving in the same direction towards long-term goals. Local leadership teams ensure the organization is flexible, effectively delivering on short-term objectives. Everyone is responsible for strategizing, ongoing learning, and identifying and growing new leaders and resources. The core leadership team devises strategy, while local leadership teams test that strategy on the ground. They adapt it locally and provide feedback to improve organization-wide strategy.

## A sustainable number of relationships

In the snowflake model, each person has a sustainable number of relationships. While you are likely to interact with many people in your organizing work, it's important to focus on maintaining relationships with those on your team (one way to do this is through regular team meetings or maintenance 1:1 meetings). As a general rule, if you are organizing full time (i.e. committing 40 hours/week), then you can maintain **up to ten relationships**. If are organizing part time, as is the case for the vast majority of grassroots organizers, you can maintain **up to five relationships**. Notice that in diagram 6, no one is connected to more than five people.

The 1:1 meeting is an important tool for building the relationships that hold your team together. See the Building Relationships section for information on 1:1 meetings.

## Mutual accountability

Notice how in the diagram the arrows point both ways. The snowflake model doesn't operate as a hierarchy, with managers delegating tasks in a top-down way and expecting results. Rather, team members are accountable to each other, mutually agree on tasks, and expect results from and provide support to each other. Someone within the core leadership team may assign a local leadership team with a task, but someone within a local leadership team is just as likely to assign the core leadership team with a task.

## Clearly defined roles and responsibilities

Each individual in a team has a specific role with clearly defined responsibilities. While the team works together towards common goals, every task should be assigned to a specific team member(s) and each team member should clearly understand their responsibilities. Roles can vary based on the strategy and tactics (e.g. in an electoral campaign, roles may include a canvass captain, phone captain, data captain, and a community organizer in a team leadership role).

## Capacity for exponential growth

Because leadership in the snowflake is distributed into many small teams, and because the model is based on leadership development, the snowflake model has the capacity for exponential growth. Teams add more people, and those people break off and form their own teams, and those teams form new teams, and so on. Therefore, it may take three months to grow from five to 25 people, but in the the next three months you could grow to 125 people, and three months later 625 people, and so on.

The size of a team and its growth rate will vary from campaign to campaign. For instance, teams working in the snowflake model structure have ranged in size from two or three people running a local campaign to teams of approximately 10,000 people in one state in a nationwide electoral campaign (Florida state during the 2012 presidential election). That said, if implemented properly, the snowflake model has the capacity to get big, and get big fast.

## The Ladder of Engagement: Recruiting organizers

The path from interested supporter to organizer does not happen overnight. Rather, it involves a supporter being recruited, tested, and escalated into roles that require progressively more commitment and skills. In order to grow and take on more leadership, our people must demonstrate that they have the ability to perform the roles of each position.

As an organizer, it's your job to identify and develop leadership in others. We call this process – whereby individuals take on more and more leadership – the “ladder of engagement.” Here's an example of an organizing **ladder of engagement** (note that your ladder might look different depending on your campaign):

1. **Supporter:** Individual supports campaign (e.g. signs a petition) but does not express interest in ‘getting involved.’
2. **Volunteer Prospect:** Supporter signs up on a website or says yes to a volunteer's ask. Organizer invites them to come out to a volunteer event, and ideally, this invitation happens **within 48 hours**, because prospects are more likely to say yes the quicker the follow up timeframe.
3. **Team member:** Supporter comes out to a team event (e.g. a meeting or a canvassing event), and is now a team member. Organizer schedules the team member to come to another event or schedules a **recruitment 1:1** meeting.
4. **Leadership Prospect:** Team member begins taking on leadership. Organizer then schedules an **escalation 1:1** meeting to ask team member to take on a leadership role.
5. **Organizer:** Leadership prospect is able to organize. They have passed tests (read on for what this means), so organizer asks them to be a leader.

“**Passing tests**” means exhibiting ability and commitment. For example, we might ask someone to run a phone bank event – the ‘test’ – and see if they follow through. If a team member shows that they can follow through on commitments (i.e. the more tests they pass), the more confidence you can have in their leadership and so give them more responsibility (e.g. ask them to step up in running regular phone banks for the team as a phone bank captain).

Note: Steps 4 and 5 can be repeated over and over to escalate the organizer into new roles as they take on more responsibility and become more committed.



## Team Stages

Teams aren't created as perfect, fully-functioning snowflakes. Rather, they go through different phases of growth and learning, and inevitably experience growing pains along the way.

**Phase 1: Potential** - At this stage, the 'team' is in its infancy. A few excited volunteers are eager to do more, but people at this stage have limited or no involvement beyond this interest. An organizer's role is to develop this team to Phase 2 as soon as possible. To do so, the organizer will network and recruit within the community by scheduling 1:1 meetings. The organizer will organize events to meet and schedule potential new team members.

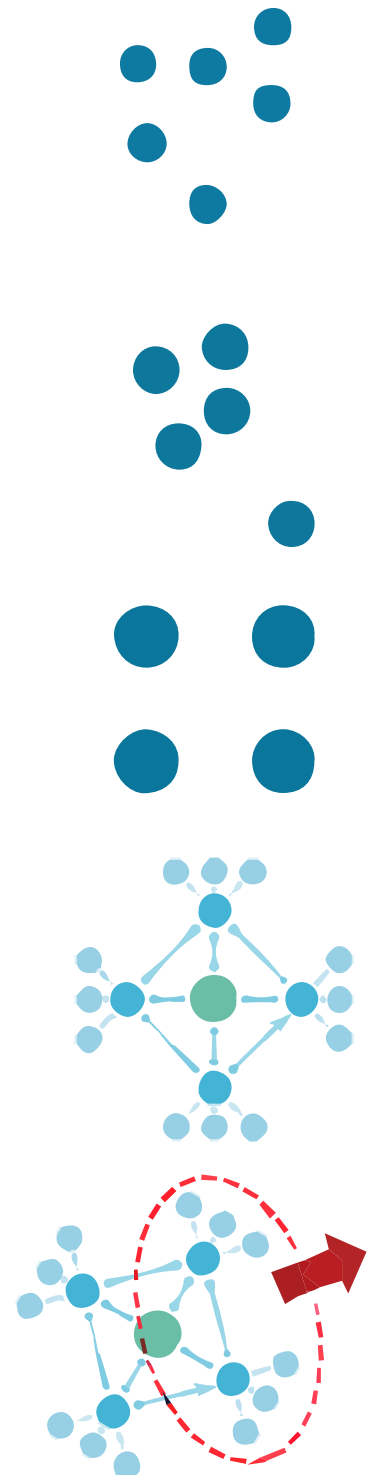
**Phase 2: Team Formation** - At this stage, the 'team' has a local team leader (e.g. a community organizer) but no other organizers. During this phase, the team leader has to work to start recruiting team members and begin moving them up the ladder of engagement until they become organizers. Note that this phase usually takes the longest.

**Phase 3: Team** - At this stage, the team has one team leader and at least one other organizer. Now, the team is official and it needs to grow to increase its potential. As more people attend events and join the team, the team grows as the leaders test, escalate, and make hard asks. The challenge for organizers in this phase is to grow sustainably – that is, without growing too quickly and neglecting members of the existing team. In this phase, you must continue to invest time and resources into testing and escalating individuals that deliver. In other words, don't get hung up on people who don't show up; focus on those that do.

**Phase 4: Developed Team** - At this stage, the team is efficient and well-established. It has at least four core organizers, including the team leader. If the team follows the ladder of engagement approach, it will grow into a bigger and more efficient snowflake over time.

**Phase 5: Team Transformation** - At this stage, the team has grown to its fullest potential and can multiply into more teams. Organizers may start training existing team members to start new teams in other neighbourhoods or regions (also known as "turfs"). Teams may split in two, with one half moving into new turf to start a team there. Organizers must be intentional and thoughtful in supporting the transformation process, as this can be a complicated time for teams and strong emotions amongst team members could come up.

Above all, remember that effective teams are bolstered by strong relationships, and that in the snowflake model, leadership is distributed, and organizers are committed to developing the leadership capacity of others.



# Strategizing

## Key Concepts

- We devise strategy by asking first, “who are our **people** and what is their **problem**?” before deciding on our **goals**.
- **Strategy is made up of “nested goals”**: smaller, measurable goals that we achieve incrementally in order to meet our larger, ultimate goal.
- A “**theory of change**” statement summarizes our strategy, and provides us with a strategic blueprint for how we plan on making change.

## What is strategy and how does it work?

Simply put, **strategy is turning what you have into what you need to get what you want.**

**What you have** is your **constituency’s resources**: people, time, skills, money, experiences, relationships, credibility, your allies, supporters, your leadership.

**What you need** to achieve the **change you want is power**. Power is gained through tactics that can creatively turn your resources into the capacity you need to achieve your goal.

**What you want** is your **goal**. Your goal is a clear and measurable outcome that allows you to measure progress along the way.

To illustrate strategy, we will use a classic organizing example: the 1956 boycott of the bus system in Montgomery, Alabama. In 1956, as part of regional racial segregation policies, African-American or black passengers had to sit at the back of the bus, and white passengers at the front. If the bus was full, black passengers were forced to give up their seats for white passengers. Demanding a change to these rules, black passengers boycotted the bus system, depriving the system of substantial revenue. 381 days after the boycott started, the bus system was desegregated.<sup>5</sup>

Strategy is **motivated** by an urgent challenge

We strategize in response to an urgent challenge or a unique opportunity to turn our vision into specific goals. We commit to the goal first, then develop how we will get there. Think of the Montgomery Bus Boycott – *what challenge did the leadership of the boycott respond to? What was their motivating vision?*

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5 For more information on the 1956 Montgomery Bus Boycott, see Branch, T. (1989). Chapter 4: First Trombone. *Parting the Waters: America in the King Years 1954-63*. New York, NY: Simon & Schuster Inc.

Strategy is **creative**

Challenging the status quo requires making up for our lack of resources by using the resources we do have intentionally and creatively. During the bus boycott, the leadership turned the resources of their constituency (a bus fare) into power by mobilizing that resource collectively.

Strategy is a verb, and is an **ongoing process**

Strategy is something we do, not something we have. Strategizing is not about creating a static strategic plan at the beginning of a campaign and implementing it. Rather, we continually strategize as we implement our strategic choices and change our strategy in response to what happens. In this way, we 'act our way into new thinking' rather than 'think our way into new acting.'

Strategy is **collaborative**

Strategy is most dynamic and effective when the group responsible for strategizing brings diverse experience, background, and resources to the table.

Strategy is **intentional**

Strategy is a theory of how we can turn what we have (*resources*) into what we need (*power*) to get what we want (*achieving goals*). We call this a "**theory of change**," and will discuss it later in this section.

## How to strategize

When strategizing, we ask ourselves three questions:

1. Who are our PEOPLE?
2. What is the PROBLEM?
3. What is our GOAL?

## Step 1: Who are my people?

When strategizing, there are different distinct groups we need to consider: our constituency, and within it our leadership, our supporters, our competitors, and our opposition. See page 47 in the Appendix for the "Tracking down the power" exercise to help you map out and prioritize your people.

### Constituency

Constituents are people who have a need to organize, who can contribute leadership, can commit resources, and can become a new source of power. An organizer's job is to turn a **community** – people who share common values or interests – **into a constituency** – people who have committed to act on behalf of those values or interests.

### Leadership

Although your constituency is the focus of your work, your goal as an organizer is to draw upon leadership from within that constituency. The work of these leaders, like your own, is to accept responsibility for enabling others to make change. They are accountable to their constituency, represent the constituency to others, and support members of the constituency in achieving shared goals, together.

## Supporters

People whose interests are not directly or obviously affected may have an interest in backing an organization or effort's work. Although they may not be part of the constituency, and are not directly involved in making change, they may have similar values and resources to contribute. For example, non-indigenous Canadians that are not directly affected by infringements on aboriginal rights may have similar values and be able to contribute resources (e.g. logistical support, money) to campaigns run by Indigenous Peoples.

## Competitors

These are individuals or organizations with whom we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. For instance, two unions trying to organize the same workforce may compete or collaborate, or two community groups trying to serve the same constituency may compete or collaborate in their fundraising. When strategizing, identify competitors and, where possible, take steps to turn them into supporters.

## Opposition

In pursuing their interests, constituents may find themselves in conflict with the interests of other individuals or organizations. An employer's interest in maximizing profit, for example, may conflict with an employee's interest in earning an adequate or living wage. The interests of a Liberal candidate conflict with those of the NDP candidate in the same riding. At times, however, opposition may not be immediately obvious, and might emerge only during the course of a campaign. When strategizing, identify your opposition, consider how they will respond to your organizing, and how you can respond in turn to neutralize their oppositional actions.

## Step 2: What is the problem?

Now we need to analyze the problem by asking three questions: *What exactly is the problem we're trying to solve? Why hasn't it been solved? And what would it take to solve the problem?*

### What is the problem?

What is the problem facing our **people**? To be most effective as an organizer, you should seek to enable your constituency to change an intolerable circumstance. In the Montgomery Bus Boycott example, the people were black residents of Montgomery, and their intolerable circumstance was a system of racist segregation policies.

### Why hasn't the problem been solved?

*Who has the resources to solve the problem? Why haven't they used them to solve the problem? Do we know how to solve it, but just lack the necessary resources? Or do we need to first figure out how to solve the problem?*

It's important to look at the history of this problem to understand what has been tried (if anything), what failed, and why.

## What would it take to solve the problem?

To determine how we will solve the problem, we develop a “**theory of change**.” A theory of change sums up *how what we do will result in the change that we want*. In community organizing, the theory of change is based on power relationships, and in this context, power is not something that you have by virtue of the position you hold in an organization. Instead, organizers understand power as the influence created by the relationship between interests and resources.

We assume that the world is the way it is because some people benefit. We also assume that these people currently have more power than us and are therefore able to maintain the status quo. Community organizing, then, focuses on power: who has it, who does not, and how to build enough of it to shift the power relationship. That shift is what makes change.

In organizing, we conceptualize two kinds of power: “power with” and “power over.” Understanding which type of power is involved in the problem we are facing helps us decide how to approach the problem.

**Power with:** Sometimes we can create the change we need just by organizing our resources with others, creating power with them. All organizing involves power with. For instance, creating a community credit union or a community run day care are examples of ‘power with’ community organizing.

**Power over:** Sometimes others hold power over decisions or resources that we need in order to create change in our lives. In cases like these, we have to organize our power with others first in order to make a claim on the resources or decisions that will fulfill our interests.

When we have to engage those who have power over us in order to create change, we ask ourselves five questions:

1. What change do we want?
2. Who has the resources to make that change?
3. What do they want?
4. What resources do we have that they want or need?
5. How could we organize those resources to give us enough leverage to get what we want?

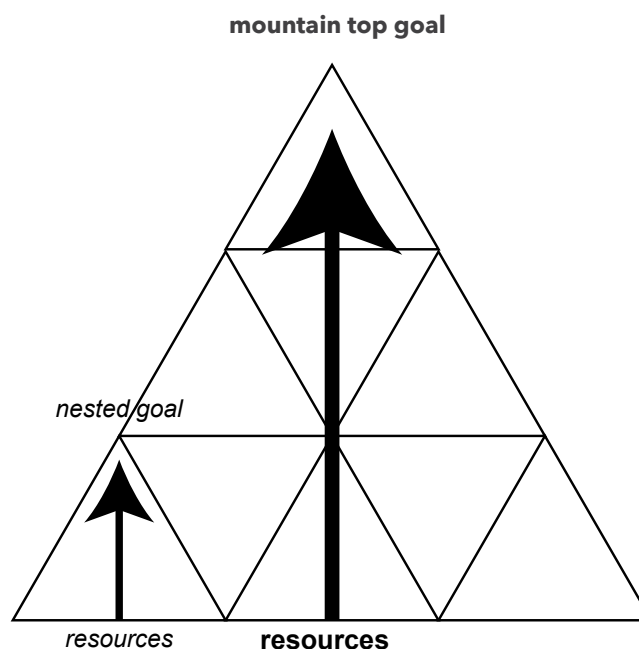
Once we have answered these questions, we’re one step closer to deciding on our strategic goal.

### Step 3: What's the goal?

A strategic goal should be **clear and measurable**. Choosing your strategic goal is the most important choice we make in designing a campaign.

No one strategic goal can solve everything. In order to put our resources to work solving our problems, we have to decide where to focus. We must ask ourselves: *what goal can we work toward that may not solve the whole problem, but will get us well on the way to solving the problem?* Unless we choose a goal to focus on, we'll risk wasting our precious resources in ways that just won't add up.

Remember, strategy is nested; a campaign's ultimate goal, or the "mountain top" goal, is likely not achievable in one attempt (see diagram 12). Instead of chasing after the mountain top goal all the time, we can set smaller, nested goals that help measure incremental progress throughout the campaign. Nested goals may take place over time (e.g. a local campaign for a municipal living wage policy may start with electing supportive council candidates before moving on to pushing for an actual bylaw), or over a geographic area (e.g. a provincial election in British Columbia may have up to 85 nested goals, one for each provincial riding a party or group wishes to influence).



An **effective strategic goal**:

1. Is **measurable**, ideally as a number with units (e.g. people, votes, dollars, hours, etc.).
2. **Focuses resources** on a single strategic outcome.
3. **Builds the capacity** of our constituency.
4. **Uses a point of leverage**: our constituency's strength or our opposition's weakness.
5. Focuses on a **motivational issue** that is visible and significant to our constituency.
6. Can be **replicated or emulated**.

## Theory of Change

Once you have an understanding of the type of power you need to build and have a measurable strategic goal in mind, you can develop your theory of change, which summarizes your strategy.

A theory of change statement is a tool to understand your strategy and how (or if) it will work. Being able to articulate a clear theory of change statement is a prerequisite to an effective campaign. To put it bluntly, if you can't write your strategy out in a sentence that makes sense, then it probably won't work.

A theory of change statement uses this format:

**If** we do (TACTICS)  
**then** (STRATEGIC GOAL or CHANGE)  
**Because** (REASON)

In the Montgomery Bus Boycott example from earlier in this section, the theory of change could be written like this:

**If** *African Americans in Montgomery boycott the bus system*  
**then** *the bus company will desegregate the buses*  
**because** *the decrease in ridership will significantly impact their profits.*

In a Canadian federal election, a partisan theory of change might read like this:

**If** *we turn out 6.2 million votes nationwide (~40%)*  
**then** *we will win a majority government*  
**because** *that will provide us with a plurality of votes in over 170 ridings needed to win.*

Theory of change statements should be clear for both the big and small picture (e.g. large scale on a national level, or small scale at the local level in electoral organizing). A single campaign may have many local theories of change nested within a broader campaign. For example, in a Canadian federal election, a local theory of change may look like this:

**If** *we turn out more than 25,515 votes in Richmond Centre*  
**then** *our candidate will win the riding*  
**because** *that will provide us with over 50% of votes in the election in the riding.*

In closing, strategy is simply turning what you have into what you need to get what you want. Thinking through - who are our people? what is our problem? and what is our goal? - and formulating a theory of change - your strategic blueprint for how you plan on making change - is critical to effective community organizing.

# Acting: Tactics & Timelines

## Key Concepts

- For a tactic to be effective, it should be **strategic, strengthen your organization, and develop individuals.**
- To effectively engage our people in action, we need their **commitment** and to use **motivational engagement.**
- An **organizing sentence** summarizes your campaign and provides clarity on your people, strategy, tactics, and timeline.

Strategy without tactics is just a bunch of nice ideas. Tactics without strategy are a waste of resources.

## Tactics: Strategy in Action

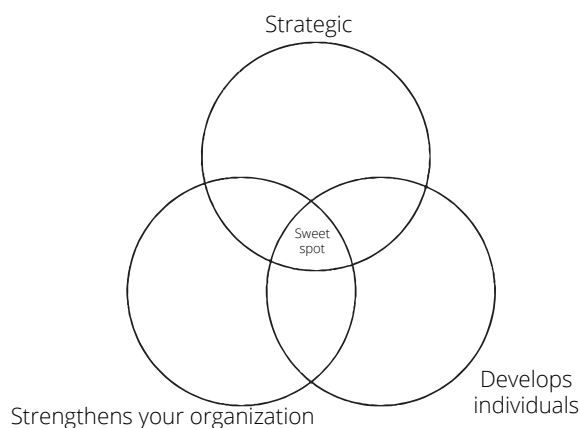
We act to put our strategy into practice, and we do this by **implementing tactics**. Just as it's important to devise effective strategic goals, it's important to choose the most effective tactics to meet those goals. Your organizing effort will quickly run into challenges if you use tactics that fail to move you towards your strategic goal. Similarly, if you spend all your time strategizing without putting it into practice via tactics – and thereby learning how to implement tactics skillfully and effectively – you will have wasted your time.

## The “Sweet Spot”

A tactic is most effective when it meets these three criteria:

1. **Strategic:** it results in concrete, measurable progress toward your campaign goals.
2. **Strengthens your organization:** it attracts and engages new people; it increases your community's capacity to work together to make change.
3. **Develops individuals:** it builds the leadership, skills, and capacity of your constituency.

When choosing tactics to implement your strategy, you're aiming for the **“sweet spot”** (see diagram) where all three of the above criteria overlap.





## Commitment and Motivational Engagement

There are two central components to engaging people in effective action: **commitment** and **motivational engagement**.

First, action requires that leaders engage others in making explicit commitments to achieve specific, measurable outcomes. We know that we cannot achieve our goals on our own, so we need others to join us.

Second, to successfully engage others in a way that expands rather than depletes our resources, we need to design action mindfully through **motivational engagement**. Once we have secured commitment from others to join us in action, it is important that they have a meaningful experience when they join us. If people don't feel like what they are doing is important, or they do not grow and learn as they act, then they are unlikely to say yes the next time we ask for a commitment.

There are three characteristics of a **motivational action**:

1. **Meaningful:** the person can see that the action is significant and makes a difference towards achieving a meaningful goal.
2. **Autonomy:** people are given levels of responsibility according to their skills and abilities to achieve a particular outcome.
3. **Feedback and Learning:** People can see the progress of their work, measure success, and receive coaching and support from more experienced leaders so they can learn and grow.

These three characteristics lead to greater motivation, higher quality work, and greater commitment. In designing and delegating action steps, then, the key is to commit people to engage in ways that facilitate such experiences.

In addition, there are five assessment criteria that serve as guidelines for designing motivational action:

- **Task Identity** – Do participants get to do the whole thing from start to finish?
- **Task Significance** – Do participants understand and see the direct impact of the work?
- **Skill Variety** – Do participants engage a variety of skills, including “head, heart, and hands” (or strategic, motivational, and skills tasks)?
- **Autonomy** – Do participants have the space to make competent choices about how to work?
- **Feedback** – Are results visible to the person performing the task, even as they perform it?

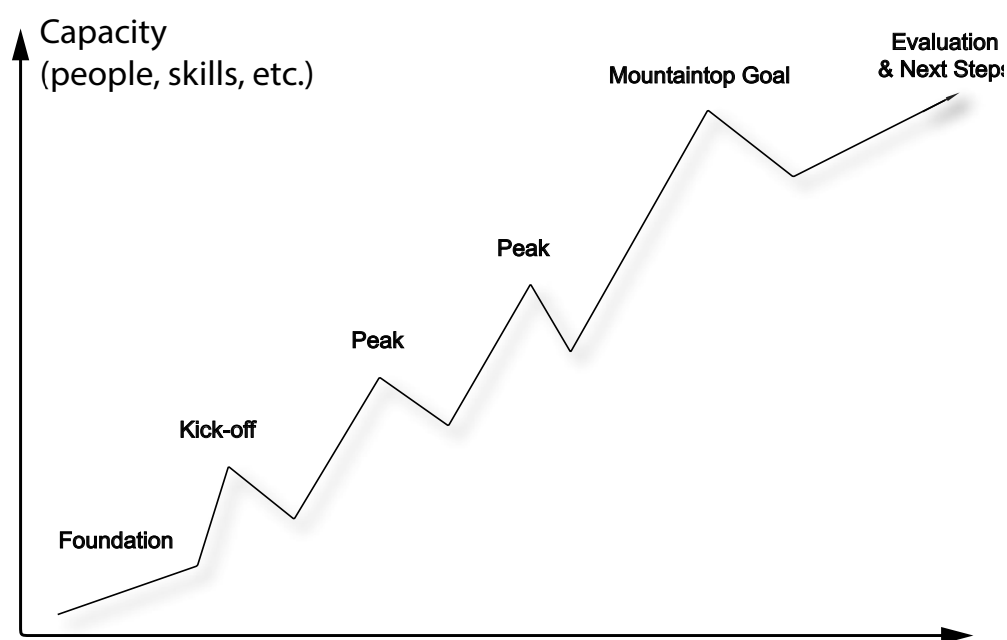
The more we ask people to commit to actions that meet these five criteria, the more likely people are to commit and continue taking action. Nearly any action can be redesigned to provide a more meaningful experience that supports individual creativity and growth while achieving the campaign's goals.

We build commitment through relationships, and the best way to secure a commitment to a specific action is by making a “hard ask.” See the Building Relationships section, in particular the section on Hard Asks, for more information.

## The Campaign Timeline

The rhythm of organizing is the campaign: coordinated bursts of activity focused on achieving specific goals. Campaigns unfold over time with a rhythm that slowly builds a foundation, gathers gradual momentum with preliminary peaks, culminates in a climax when a campaign is won or lost, and then achieves resolution.

In organizing, we assume that we begin a campaign with far fewer resources than we will need to tip the balance of power and achieve our goal. Growing our capacity (people, money, skills, etc.) is critical for success. This capacity-building is what builds momentum. Like a snowball, each success contributes resources, which makes the next success more achievable. As we map our campaign, we identify milestones for when we will have created enough new capacity and developed enough power to undertake activities that we couldn't before. Read on for more details of what happens during each step of a typical campaign timeline.



### Foundation

During the foundation period, the goal is to create the capacity (or, the “power with,” see the Strategizing section for more information) needed to launch a campaign. A foundation period may last a few days, weeks, months or years, depending on the scope of the undertaking and the extent to which you start ‘from scratch.’ Organizers prioritize relationship-building during the foundational period. This typically includes 1:1 meetings, house meetings, and meetings of small groups of supporters. You want to build as broad a base as possible while not letting things heat up too quickly. This is a crucial period for leadership development.

## Kick-Off

The kick-off is the moment at which the campaign officially begins. Setting a date for a kick-off creates urgency and focuses the concentration and commitment it takes to get things going. The kick-off becomes a deadline for initial recruiting, planning, and preparation of materials. Typically, a kick-off takes the form of a big meeting or rally around which everyone is mobilized. Leadership can be recognized there, the campaign story told, the plan ratified, and the program adopted. In terms of action, sign-ups can be gathered, and commitments can be made to hold a meeting, make phone calls or pass out leaflets, and so forth.

Note that for organizers, the primary purpose of a kick-off isn't to create a media event, but to bring in new people and establish commitment to the campaign. A kick-off is also a deadline for the formal delegation of leadership roles to those who will be responsible for carrying out the campaign.

## Peaks

The campaign proceeds toward a series of peaks, each one building on what has come before. By crossing the threshold of each peak, we break through to the higher level of capacity needed to reach our next target. Each peak should have a measurable goal (e.g. number of people at a rally, number of signatures on a petition, number of organizations pledging support, etc.) that launch you forward towards your next peak. This way, you can measure success and make adjustments accordingly based on observable data.

## The “mountain top” peak

The campaign “mountain top” peak comes at the moment of maximum mobilization. Beware of peaking too early – often, campaigns accidentally peak at the kick-off. Your goal as an organizer is to have your campaign capacity reach its peak at the time when it is needed most. In some cases, the timing of this peak is predictable (e.g. in an election campaign). In other cases, those who lead the campaign can designate the peak. In still other cases, the mountain top emerges from the actions and reactions of all those playing roles in the campaign.

## Evaluation and next steps

Campaigns are either won or lost. Only by risking failure do we make the kind of commitments that make success possible.

Resolving a campaign, however, means learning how to be successful at winning and losing. To succeed at winning, you must realize when you have won and learn to celebrate success. On the other hand, never claim a victory that's not yours or pretend a loss is a win. It robs the effort of its value. We need to acknowledge a loss as a loss, but contextualize the loss, interpret what happened, accept responsibility, recognize those who contributed, and prepare for what comes next.

Win or lose, a campaign should always conclude with evaluation, celebration, and preparation for next steps. When we win, we are sometimes so interested in celebrating, we forget to learn why we won, what we did right or wrong, and recognize those who contributed. When we lose, even when we do evaluate, we may not celebrate the hard work, commitment, courage, and achievements of those involved in the campaign. The important thing about campaigns is there is indeed a 'next time' and it is important to prepare for it. Or, as many a Canucks fan has remarked, “Just wait ‘til next season!”

## Organizing Sentence

The “**organizing sentence**” is a tool used to clarify the important components of your strategy and organizing plan. Every team in a campaign – including the core leadership team and each local leadership team – should compose an organizing sentence unique to their team.

An organizing sentence looks like this:

We are organizing (WHO) to (WHAT OUTCOME) through (HOW) by (WHEN).

Or, put another way:

We are organizing (*our people*) to (*strategic goal*) through (*tactics*) by (*timeline*).

For example, in a provincial election, a core leadership team’s organizing sentence may look like this:

**We are organizing** *BC Liberal Party members and other supporters of a free enterprise coalition* **to** identify 805,126 voters who will pledge to vote Liberal **through** *door-to-door and phone canvassing* **by** *May 13, 2014*.

Similarly, a local leadership team’s organizing sentence in a provincial election may look like this:

**We are organizing** *BC Liberal Party members and other supporters of a free enterprise coalition in the Nechako Lakes riding* **to** identify 4,920 voters who will pledge to vote Liberal **through** *door-to-door and phone canvassing* **by** *May 13, 2014*.

To summarize, we implement tactics to act and put our strategy into practice. In order to be effective, we must employ “sweet tactics” that are strategic, strengthen our organization, and develop individuals. In turn, formulating an organizing sentence – that employs sweet tactics and is mindful of the campaign timeline – is a useful tool for guiding and focusing our organizing.

## Further Reading

Issenberg, S. (2012). *The Victory Lab: The secret science of winning campaigns*. New York, NY: Broadway Books, Crown Publishing.

Sharp, Gene (1973). 198 Methods of Nonviolent Action. *A Force More Powerful*. See <http://www.aforcemorepowerful.org/resources/nonviolent/methods.php>

# Tying It All Together

This guide has provided an introduction to organizing as **leadership that enables people to turn the resources they have into the power they need to make the change they want.** We've also outlined the five key leadership practices - **telling stories, building relationships, structuring teams, strategizing, and acting** - that together, make up a framework for effective community organizing.

We practise telling stories, building relationships, and structuring teams to **build power** in our organizing. Telling stories communicates our shared values and motivates others to take action. Telling stories also connects us to one another and is key in building strong relationships. In building relationships, we secure commitment from our communities and grow and sustain a constituency. In turn, relationships are the glue that bind effective teams together, and we structure teams so that we can work together in a sustainable and empowering way.

We strategize and act to **wield power** in organizing. We devise strategy in response to an intolerable circumstance our community faces, and our strategy becomes our blueprint for making change. We implement strategy through acting via tactics and subsequently, deepen our relationships, strengthen our teams, and develop shared stories in the process.

By tying all these practices together in our organizing, we embody leadership as **accepting responsibility for enabling others to achieve purpose.** In so doing, hopefully, we achieve the change we want and develop leaders capable of creating positive change thereon.

# Appendix

## Worksheet: Developing your Public Narrative

### Story of Self

To start in developing your Story of Self, reflect on the following questions:

1. Why am I called to leadership?
2. Why did I decide to tackle this specific injustice or problem and work on this organizing effort?
3. What values move me to act? Have these values always been important to me? If not, when did that change? How might these values inspire others to similar action?
4. What stories can I tell from my own life about specific people or events that would show, rather than tell, how I learned or acted on those values?

Next, use the table below to dig deeper on who you are and why you're here. Write down thoughts or draw pictures to illustrate your responses.

| Where you come from                                                                                                                                                                                                                                                                                                                                              | Who you are                                                                                                                                                                                                                                        | How you got involved                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>- Where were you born and where did you grow up?</li> <li>- Are there people that made an impact on you while growing up (family members, community members, role models, friends)?</li> <li>- Are there significant childhood experiences that stick out for you (early memories, coming-of-age experiences)?</li> </ul> | <ul style="list-style-type: none"> <li>- What are you passionate about (interests, talents, hobbies)?</li> <li>- Are there significant experiences that have had an impact on your choices (school, travel, work, family, or partners)?</li> </ul> | <ul style="list-style-type: none"> <li>- Are there people or significant experiences that stick out for you (social movement leaders, role models, books or knowledge) that spurred you into taking action for the first time?</li> <li>- What was your first experience of getting involved in organizing (volunteering in your community, supporting an organization, voting, attending a rally or protest)?</li> </ul> |

Next, based on your reflection, use the table below to write out the details of one choice point – a specific experience when you faced a challenge, made a choice, experienced an outcome, and learned a lesson.

| Challenge                                                                                                                  | Choice                                                                                                     | Outcome                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>- Why did you feel it was a challenge? What was so challenging about it?</li> </ul> | <ul style="list-style-type: none"> <li>- Why did you make the choice you made? How did it feel?</li> </ul> | <ul style="list-style-type: none"> <li>- How did the outcome feel and why? What did it teach you?</li> </ul> |

Now, you're ready to draft a Story of Self. In crafting your story around the choice point you've chosen above, try to be as detailed as possible. Create setting for your listeners – paint a vivid image of what you experienced (what you felt, how it sounded or looked like). Feel free to draw pictures, too.

Story of Us

To start in developing your Story of Us, reflect on the following questions:

- 1. What values do you share with this community? (note: 'community' here is the 'us' in your story)
- 2. What experiences have had the greatest impact on this community? What challenges has it faced?
- 3. What change does this community hope for and why?

Next, based on your responses to the above, use the table below to reflect on another choice point but this time, for your community. (Note: 'community' here can mean your group or organization, people involved in your campaign, or even the specific individual or group of people with whom you're sharing your story).

| Challenge                                                             | Choice                                                       | Outcome                                                              |
|-----------------------------------------------------------------------|--------------------------------------------------------------|----------------------------------------------------------------------|
| - What was the challenge we faced? What's the root of that challenge? | - What specific choice did we make? What action did we take? | - What happened as a result of our choice? What hope can it give us? |

Your goal here is to tell a shared story that evokes shared values, illustrates the challenge(s) your community has faced or faces, and gives them hope that it can act together to make change.

Story of Now

- In developing your Story of Now, reflect on these questions
- 1. What is the urgent challenge your community faces?
  - 2. What change does this community hope for and why? What would the future look like if this change is made? What would the future look like if the change isn't made? (note: here, you're trying to paint a picture of the 'dream' of the future if the change is made, and the 'nightmare' of the future if it isn't.)
  - 3. What choice are you asking people to make and why now?
  - 4. What action are you asking them to take and what impact will this have on the bigger picture? What's the risk, or, what would the future look like if we fail to act?

Next, based on your responses to the above, use the table below to reflect on one last choice point but this time, one that your community faces now.

| Challenge                                                                                                                                                          | Choice                                                                                            | Outcome                                                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| - What is the problem your community faces? Why is it urgent to organize now? What stories or images can you convey to make the challenge real for your listeners? | - What will the future look like if we fail to act? What could the future look like if we do act? | - What choice are you asking people to make? It it clear what form their action will take and how it fits within the bigger picture (the 'dream' of the future you've described)? |

In drafting your Story of Now, remember that you're trying to paint a clear and vivid picture of the urgent challenge your community faces, what the future could look like if they join you, and what specific action your listeners can take now to make it happen. Quick tip: your Story of Now should end with a "hard ask."



Weaving it together

Now it's time to weave Self, Us, and Now together. Use the table below to guide you. Then, it's time to try it out by practicing your full Public Narrative with others.

| Self                                                                                                                                  | Us                                                                                                                             | Now                                                                                                                                                  |
|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div>- Which choices in your life have led you to be here today? Pick one or two that relate to this community and this moment.</div> | <div>- What is this community all about and which stories reveal that? What specifically moves you about this community?</div> | <div>- What challenges make you feel enough (or angry enough) to act? What gives you hope? What specific choice are you asking people to make?</div> |

## Worksheet: Coaching Stories

The following are three steps to help you coach others in their storytelling. Review this worksheet before you start. Remember, your goal here is to listen and to support the coachee in improving their stories. Steer clear of sugar feed-back - "That was really great!" - and instead, try asking questions and observing how the coachee responds.

### Step 1: Ask questions.

Start by asking:

"How did that go for you? How did you feel telling your story?"

"If you were to tell it again, would you change anything in the telling? If yes, what would you do differently?"

Then, note some of your first impressions and give them space to speak to what you noticed.

"I noticed you did \_\_\_\_\_ or made this decision in telling your story, why did you do that?"

"You said \_\_\_\_\_ in telling your story, what did you mean by that?"

### Step 2: Pay attention.

As you're listening, reflect on the following elements of the story and ask yourself the attendant questions. Repeat some of your reflections back to the storyteller using the sample statements.

#### A. Challenge, choice, outcome.

- What were the specific challenges the storyteller faced?
- Did the storyteller paint a clear picture of those challenges?
- Was there a clear choice made in response to the challenge(s)?
- What was the outcome that resulted from the choice(s)?

"When you described \_\_\_\_\_, I got a clear picture of the challenge."

"I understood the challenge to be \_\_\_\_\_ and the choice to be \_\_\_\_\_. Is that what you intended?"

"How would you describe the outcome of your choice? I heard \_\_\_\_\_ or learned \_\_\_\_\_, is that what you intended?"

#### B. Values.

- Could you identify the storyteller's values and where they come from?
- Did you hear the storyteller voice or describe certain emotions? How did the story make you feel?

"It's clear from your story that you value \_\_\_\_\_."

"Your description of that value / emotion resonated with me because..."

#### C. Details & Setting.

- What were the sections of the story that had especially vivid details? What did these descriptions do or how did they make you feel?

"Your description of detail / image / feeling helped me identify with your experiences because..."

### Step 3: Tell them what you'll remember.

Tell the storyteller what stood out for you or resonated with you, and what you will remember.

"Your description of detail / image / feeling stood out for me, because..."

"The story hooked me at \_\_\_\_\_ point, because..."

## Worksheet: Tracking down the power

Here is an exercise to help you identify important people or groups when strategizing, and when designing and implementing tactics.

This exercise needs:

- Markers
- Post-it notes
- Two sheets of flipchart paper or a large whiteboard or blackboard
- Your leadership team

### Step 1: Map the actors

Draw the diagram from the following page ("Map the Actors") on a large piece of flipchart paper or whiteboard. Gather your leadership team. On post-it notes, write out the names of individuals and groups who have influence on your campaign (or have the potential to influence your campaign). Stick the names in the appropriate ovals in the "Map the Actors" diagram you've drawn out. Refer to the "Step 1: Who are my people?" portion of the Strategizing section to guide you.

### Step 2: Field of Play

Now, draw the "Field of Play" diagram on a large piece of flipchart paper or whiteboard. Take the actors you mapped out and put them on the field. The field of play is a spectrum – ranging from those with the greatest interest in change to those with the greatest interest in the status quo. Place each post-it note from your map of actors onto the field of play along the spectrum. As you go, ask if each actor is currently taking action on the issue (whether in support of or in opposition to your goals), or if they are 'on the sidelines.'

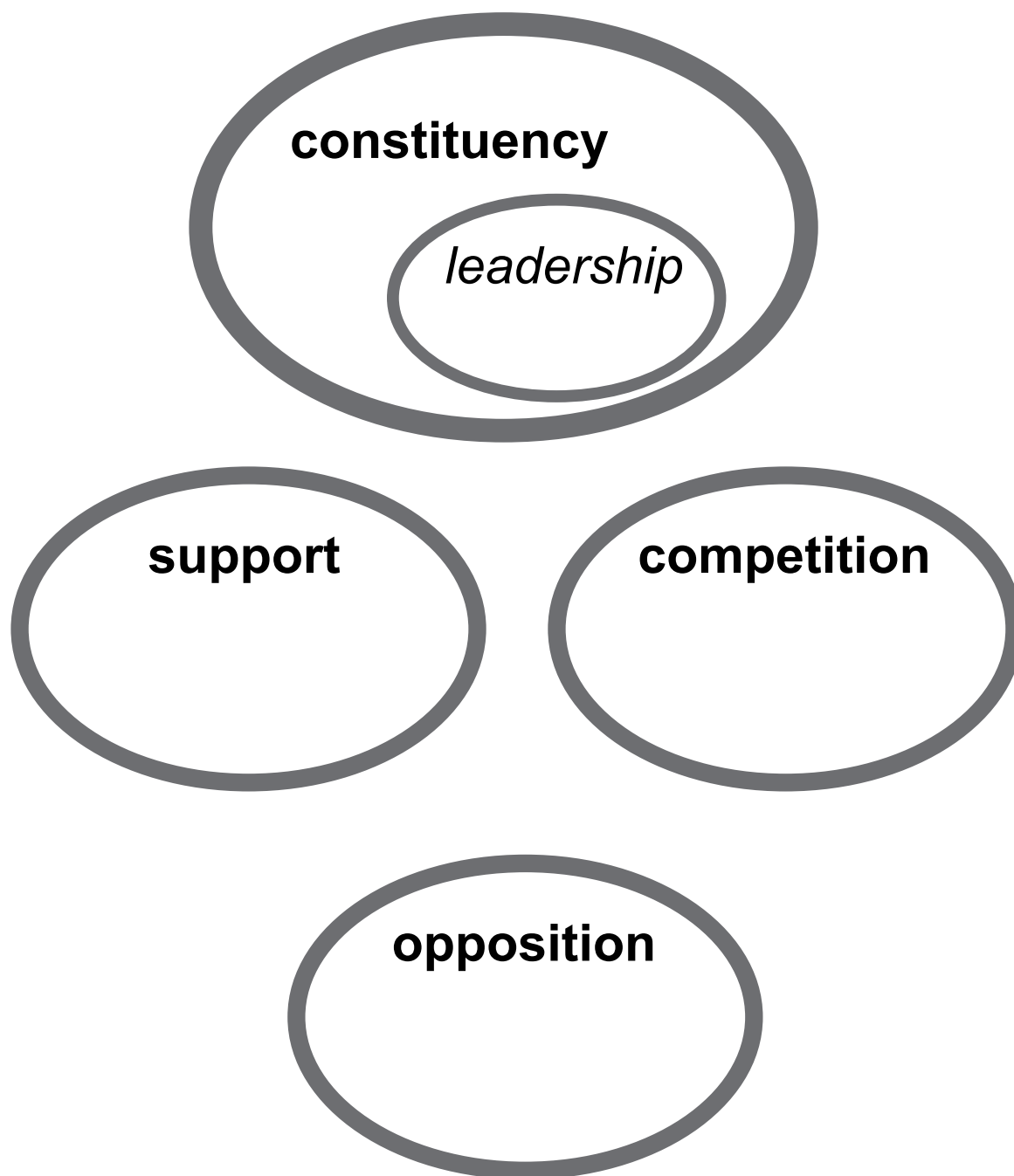
### Step 3: Debrief and reflect

When finished, step back and observe your field of play. Ask yourself the following questions:

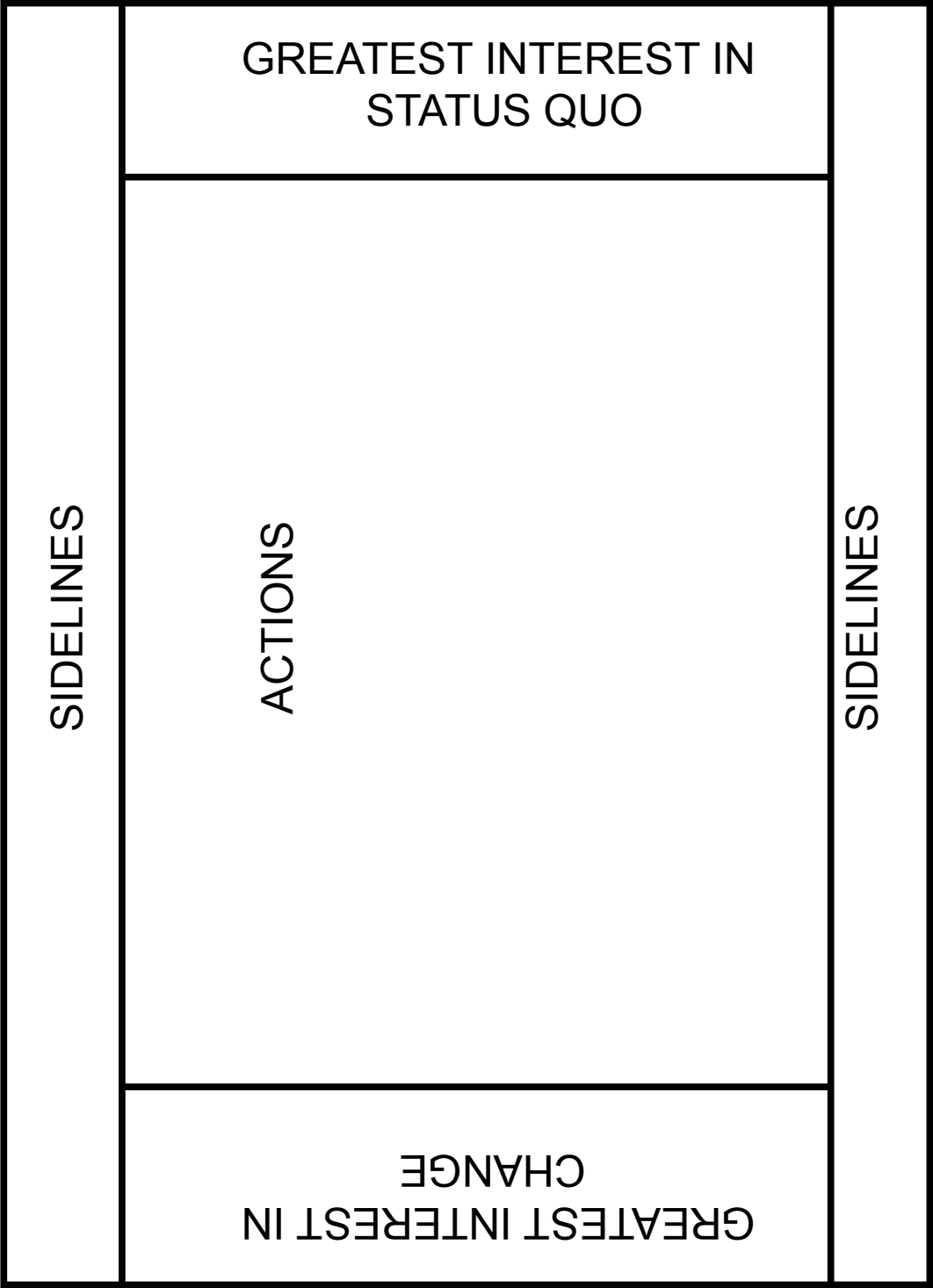
- Are there key supporters on the sidelines?
- What would it take to get those key supporters off the sidelines?
- Are there influential competitors taking action in conflict with your goals?
- What steps could be taken to convert them to supporters or to your constituency?
- Are there effective opposition groups taking action?
- What steps could be taken to neutralize or overcome their efforts?

Remember: don't get stuck addressing every actor; instead, try to focus on a few that are the most influential.

## Map the Actors



Field of Play





ORGANIZING:  
PEOPLE, POWER, CHANGE

# FUNDAMENTALS OF ORGANIZING TOOLKIT

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## Introduction

### What Is Organizing?

Organizing is people coming together to collectively create the change they want to achieve. It is people joining together to work toward common goals.

In 2002, Marshall Ganz's article in *Social Policy*, titled *What is Organizing?* described organizing this way:

*Organizers identify, recruit and develop leadership, build community around leadership, and build power out of community. Organizers challenge people to act on behalf of shared values and interests. They develop the relationships, understanding, and action that enable people to gain new understanding of their interests, new resources, and new capacity to use these resources on behalf of their interests. Organizers work through "dialogues" in relationships, interpretation, and action carried out as campaigns.*



### Self-Interest - A Building Block for Organizing

One-on-one conversations are a critical organizing tool for understanding self-interest and in building relationships in order to mobilize people into action.

Everybody cares about something; figuring out what that something is takes understanding the person's self-interest. Organizing is finding out what someone's self-interest is and what they care about. Nobody is apathetic about issues such as school safety, student learning conditions, dignity and respect in the workplace, professional development, or their paycheck.

Apathy is often mistaken for feeling powerless and the inability to effect change. As organizers we must tap into the issues people care about and offer inspiration and collectively develop viable solutions to address those issues. We can't make assumptions about what is in someone's self-interest; we must hear it articulated by an individual. Relationships are the foundation of organizing. If you have a relationship with someone based on trust, not only will they share what they care about—their self-interest—you can mobilize them into action.

NEA, Affiliates and Locals organize to build power to make change. Our power comes directly from our members. To successfully build power, we must engage members and increase membership. To engage and increase membership, we must understand the issues our members care about—understand their self-interest.



Ultimately we seek to build power to make change. In this toolkit, we will cover the critical elements of organizing:

- One-on-One Conversations
- Issue Identification
- Mapping the Workplace
- Bargaining—Issue Campaign
- Campaign Planning
- Building Power
- Organizing for Community Support

Organizing principles are the same whether you are trying to invite potential members to join your Association, identify and develop local leaders, rally members to support demands (whether residing in a state with a bargaining statute or a state without a bargaining statute), enlist community help for an issue of concern, or drum up support for a political candidate or platform.

The strategies and tactics provided here will assist Affiliates and Locals to successfully achieve campaign goals.

## One-on-One Conversations

### One-on-One Conversation Tools

- The Relational Meeting: Purpose and Process of the Organizing Conversation
- An Organizing Conversation
- Conducting a One-on-One Conversation: Key Components
- Practice the Organizing Conversation
- Write Your Own Organizing Conversation
- Worksite One-on-One Conversation Reporting Form
- General One-on-One Conversation Reporting Form
- How to be a Good Listener
- Anger, Hope, Urgency, You (AHUY)

All organizing is based on building relationships and finding common ground. Personal relationships are the foundation for mobilizing members into collective action. We cannot mobilize people effectively if we don't know what matters to them and what motivates them.

Through face-to-face, in-depth conversations, organizers can build the trust of the people they are contacting and make sure their questions are fully answered. That trust and understanding, developed through personal contacts, will be necessary to maintain support for whatever kind of campaign the Association is engaged in. This is also known as relational organizing.

Whether you are in a small or large workplace, conducting one-on-one conversations with all of your colleagues can feel very overwhelming. It is important to begin your conversations with colleagues who are respected by their peers and administrators. From that group, start with those you know and trust and expand your reach from there.



### Goals of One-on-One Conversation

- Assess where people stand, how they feel
- Find peoples' passion
- Identify potential leaders and activists
- Develop relationships
- Identify and validate self-interests
  - > personal goals
  - > professional ambitions
  - > values
- Identify what motivates or inhibits
- Agitate—Why are things the way they are and how can things be different?
- Inoculate
- Identify social and community connections
- Get commitment
- Set a follow-up plan
  - > Build solidarity/power
  - > Collect and analyze data



## Listening

Asking questions and active listening during a one-on-one conversation can identify common ground—issues, interests, values—that can lead to collective action. Listen for:

**Issues:** The topics, problems, concerns and public policy that people care about.

**Interests:** A person's stake in an issue.

**Values:** The moral principles people live by.

**Capacity:** What an individual can contribute to an issue or group, e.g., money, time, special skills, networks.

**Commitment:** What an individual is actually willing to do. A person's commitment is directly related to the depth of his/her interest.



### Active Listening

There are times when we all should listen rather than talk; however, this is often easier said than done. Research shows that we listen to people at a rate of 125–250 words per minute, but think at 1,000–3,000 words per minute. And once finished talking, we can only recall about 50% of what was said. We need to take note and better learn that there are times when being silent is powerful...and then there are times when we really do need to stop the conversation to speak up and ask those important questions before the topic becomes a runaway train.

It might be easier to discern the difference between when to talk and when to listen if you apply the 80/20 rule. Spend 80% of your time listening and only 20% of your time actually talking.

Plus, when you listen, you can repeat some of the words back to the other party and they will be astounded because you “get it” and listened with authenticity to hear and UNDERSTAND.

## An Organizing Conversation

Here are some guidelines for a fruitful conversation (or a series of conversations) with a co-worker.

Nobody should follow a script mechanically, of course. Talk with people like human beings! But think of this outline as a tool. The steps can help you move toward a goal, so your co-worker isn't left feeling like their time's been wasted with a spiel or a gripe session. Done right, an organizing conversation leads to action.

Your job is mostly to ask questions. You want your co-worker to realize:

- He/she cares about a problem.
- There's a decision-maker who has the power to fix this problem.
- The decision-maker won't fix it until someone pushes them to.
- If your co-worker really wants this problem fixed, he/she has to join you and other co-workers in taking action.

But just telling them all this wouldn't be very effective. Instead, you want to ask the right questions that prompt the individual to bring it up on their own. To ask the right questions, you need to choose an issue by understanding the difference between an issue and a problem. As the Midwest Academy puts it, “A problem is a broad area of concern. An issue is a solution or partial solution to the problem.” You don't organize people around homelessness; you organize them around a bill to allocate more funding for affordable housing programs, or around creating a coalition of churches willing to provide shelter to those who need a place to stay.

Most likely, if you are concerned with large, complex problems like homelessness or hunger, you will not be able to pick one issue that will solve the problem completely; you will need to target one specific facet of the problem. How do you choose that issue? The Midwest Academy suggests many criteria for this process, as follows.





## Issue Identification

### Issue Identification Tools

- Checklist for Deciding on an Issue
- A Good Organizing Issue
- Issue Selection
- Evaluate Your Organizing Issue
- Getting the Ball Rolling

It's important to organize around issues, not problems.

### The Criteria for Deciding on an Issue

#### 1. Result in a real improvement in the lives of students, school staff, and community members

If you can see and feel the improvement (if it is measurable), then you can be sure that it has actually been won. The group must seek a broad consensus on what an improvement really is and state it clearly as a goal.

#### 2. Give people a sense of their own strength.

People should come away from the plan feeling and knowing that their efforts caused the project to succeed. This builds the confidence to take on larger issues.

#### 3. Alter the relationships of power.

Building a strong coalition creates a center of power and communication that leads to changes in the way the decision-makers make decisions.

#### 4. Be worthwhile.

People should feel that they are working for something about which they care, and which merits the effort.

#### 5. Be winnable.

From the beginning, people will have to be able to see that there is a good strategy for winning on an issue. Don't choose an issue that is so huge and abstract that the end result is unimaginable. Those involved should be able to see, from the beginning, that there is a good chance of succeeding in their efforts.

To facilitate development of a good strategy, try to get advice from those with experience:

- Find out who has won on the issue and talk with them.

To develop a winnable project plan, consideration must be given to costs to your group:

- How much money will your plan cost?
- How much time and effort will your plan require?

Consideration must also be given to the cost of any opposition to your issue:

- How much money will your plan cost those who might oppose it?
- How much money are they likely to spend to defeat your plan?
- What do they value that will make them want to hold out against your plan?



#### 6. Be widely and deeply felt.

Many people must feel that the issue is real and agree with the solution. No matter the job family, employees must feel strongly enough about the issue to do something about it.

#### 7. Be easy to understand.

It is preferable to not have to convince people that the issue exists, that the solution is good, and that it is important for them to help solve it. Sometimes this is necessary, though, particularly with issues that involve school finance.

#### 8. Identify the decision-maker.

The decision-maker is the person who can give you what you want. A more complex project plan may focus on several decision-makers. During planning, if the group can't decide who the decision-maker is, it will be necessary to reexamine the viability of the issue or define the goals more clearly.

#### 9. Have a timeline that works for your group.

Your group should establish a timeline that defines the approximate dates for the beginning,

middle, and end of your project plan. It will be important to put your goals and accompanying tactics in the timeline.

#### 10. Do not be divisive.

Avoid issues that divide your group. Survey your group to find an issue that will be supported. Will this issue help or hinder in reaching new people?



#### 11. Build leadership.

The plan should have many roles and tasks inviting the involvement of a multitude of individuals no matter their job classification. Consider the skills people will develop and the contacts the group will make for future work together.

In a plan that involves working with a coalition, building leadership has a different meaning since the coalition partners are already leaders. Coalition leaders may need to learn to work with each other and to merge several plans together.

#### 12. Be consistent with your values and vision.

Values should be consistent with the group's values and vision in support of public education and public education employees.

#### 13. Set your organization up for the next fight.

You need to build capacity through leadership development, capacity building, messaging, actions, activist identification, etc., which will give you a jump-start when you are ready to go for the next campaign.



### Let's Begin Organizing... The Critical Conversation

#### 1. Discover the issues

Begin by asking questions—and listening to the answers—to learn what your co-worker cares about. Make your questions open-ended, especially when you're getting to know someone.

How's your day going?

How did you get this job?

What do you like about working here?

When you're organizing around a particular issue, your questions might get more pointed. Still, even if you have a petition about the awful new schedule, don't leap straight into "Will you sign this?" Instead, ask:

I hear your now working a morning and afternoon shift schedule-how does that work for you?

The point is for your co-worker to remind himself or herself how they feel about this problem, before you ask them to act. If you've discussed this issue before, you can still ask how it's affecting them today, or share someone else's story and get their reaction.

#### 2. Agitate

React to what he or she tells you, and ask follow-up questions. By reacting, the organizer can help the other person feel they have permission to be angry:

Wow. How long has that been going on?

How does that make you feel?

Is that okay with you?

How are you coping?

How is that affecting your family?

### 3. Lay the blame

Get them talking about who's responsible.

Why do you think we're having this problem?

Who's in a position to fix it? What would they have to do?

Do you think this problem is going to correct itself?

Many times we feel our problems are just "the way things are." Realizing that bad conditions didn't fall from the sky can be empowering. If someone made the decision that caused this mess, that someone could also unmake it.



### 4. Make a plan to win

Now that your co-worker is angry, it's time to offer some hope. Hope comes from your power in numbers and a winnable plan. That's how you make your problem into a problem for the decision-maker.

Most people want to go back to the old bell schedule. The administrator hasn't listened, but what if 25 of us sign this petition, and we all march into his office together to deliver it?

What do you think he'll do? Will he be able to keep ignoring us?

What's his supervisor going to say?

This step will be trickier if today's petition doesn't address a problem that this person feels strongly about. You'll have an easier time organizing if you choose issues that are widely and deeply felt.

But what you can say is that power in numbers is our only way to get a say on any issue. For instance:

If we win on this issue, do you think administration will learn something? Will taking action on the next issue be easier?

This is the first step. We've all got to start backing each other up. How else are we going to build enough power to fix the understaffing you're talking about?



### 5. Get a commitment

Ask the member to be part of the solution by taking a specific action.

Will you sign this petition and come with us to deliver it on Thursday?

If someone is fearful, acknowledge that their fears have real reasons behind them. But still, things won't get better unless they get involved. Your job isn't to convince them that their fears are unfounded, but that they need to act anyway.

How is the schedule ever going to get fixed if we don't take action? Are you willing to let this problem go on?

Helping the member through it will be a lot easier when you're inviting them to act on what they've already said—not pushing an action you're trying to "sell."

### 6. Inoculate and re-commit

Now your co-worker is committed—but does he/she know what they're getting into? Ask how they think management will react to the action.

What do you think the administrator will say when we go to his office?

If there's a likely risk he/she hasn't thought of, warn them about it.



What if he gets angry and threatens to write everyone up? What if he offers to meet with one or two of us but not the whole group?

Talk through the possible outcomes. Then ask whether you can still count on their participation.

Does any of that change your mind?

This part might sound like you're undermining your organizing. You've gone to all this trouble to help your co-worker decide to act, and now you're trying to talk them out of it? But like inoculating against a virus, the idea is to help them develop an immunity to the administrator's attacks—by giving them a small dose before they're exposed to the real thing.

This way, when the administration reacts, he or she won't be thrown by it. In fact, your correct prediction will boost your credibility.



## 7. Set a follow-up plan

As organizers, we need to be continually cognizant that follow-up is the key to organizing. Without timely and continual follow-up, much of your hard work will be for naught.

Agree on the next step, and when you'll check back in. Maybe they're going to meet you on Thursday to deliver the petition, or they'll ask two co-workers to sign. Or maybe you simply promise to report back on Friday about how the meeting went.

Remember, you're not just trying to pull off this one action. You're also trying to draw people gradually closer to the center and build an ongoing network of communication. You're trying to make standing up, in an organized way, a normal and natural part of workplace life.

Can you ask Jane to sign? Great! I'll come back at the end of the day to find out how it went, okay?

## Assessment of One-on-One Conversations

Assessment is a word that describes the act of organizers engaging people in one-on-one conversations to determine as best as possible their degree of support for the union, based on the directly observable verbal, visual, and behavioral indications uncovered in the conversation. Assessments are conducted several times during the life of an organizing campaign and for various strategic purposes. Although the underlying reason for assessments is to measure the level of union support at any given point in time, assessments also are used to:

- Track movement of support.
- Continually assess leadership potential and development.
- Guide allocation of time and resources in a campaign.
- Provide a road map of who needs the highest priority of a personal organizer's attention in a campaign.
- Measure committee effectiveness.
- Uncover issues.
- Gain feedback on effectiveness of tactics and issues.
- Assess outcome of worker "tests" throughout the campaign.
- Test effectiveness of the employer campaign.

Conducting assessments is a fundamental skill that organizers must learn and constantly practice. Conducting assessments effectively calls upon an organizer's skills in communication and observation, especially listening skills. Assessments must be as precise as possible, directly observable, and measurable.

## Assessment Dos and Don'ts

**DO** always base assessments on directly observed verbal, visual, and (most important) behavioral indications of the person's degree of support for the union, such as volunteered statements or more preferably observable actions in support of the union.

**DO NOT** base assessments on supposition, hearsay, rumor, or a previous assessment.

**DO** begin assessment conversations with open-ended probing questions that allow you to uncover indications on which to base your assessment.

**DO NOT** rely entirely on closed-ended "yes" or "no" questions, or direct questions on the person's degree of Union support that will easily allow the person to provide the answer he or she thinks you want to hear or need to hear so you will just go away. If you do ask

## Remembering your conversation

It is appropriate—and strongly advised—to make notes immediately after the conversation when the organizer is no longer with the person. Also, it is appropriate to make notes on information a person offers to the organizing campaign, such as names of co-workers, phone numbers, information on the employer, etc.—but first gain permission from the person to do so.

Prior to starting the conversation, a question such as: “Do you mind if I take a few notes as we talk?” will go a long way in building the relationship.

direct questions, make sure you collect other evidence to support or refute the answers you hear.

**DO** use active listening skills.

**DO NOT** be so focused on how you will respond to what you hear that you miss important indications provided to you in the conversation that will help you with your assessment or that will provide clues on how to probe more deeply for those indications.

**DO** watch for non-verbal indications in addition to what is being said in the assessment conversation.

**DO NOT** ignore facial expression and body language. They are important elements of the conversation.

**DO** treat the assessment conversation like any other organizing conversation.

**DO NOT** communicate overtly that the purpose of the conversation is to make an assessment.

**DO** make mental notes of how you will assess the person, how you will justify that assessment based on what you observed, and any issues or problems uncovered in the conversation.

**DO NOT** make written notes during the conversation and **DO NOT** complete any paperwork associated with the assessment in front of the person.

**DO NOT** be fooled by the “friendly 4,” the person who is nice to you but does not provide any evidence of having the characteristics of someone who should be assessed as a “1”, “2”, or “3.”

**DO NOT** confuse assessing worker support for the union with assessing personality. There are people whom you do not personally admire who are “1s.” Conversely, the nicest person you know may never support the union.

**DO** end the assessment conversation in as positive a manner as possible, keeping the door open for future contact.



| Code | Assessment Definition                                                              |
|------|------------------------------------------------------------------------------------|
| 1    | Leader: member or potential member who will do anything for the campaign's success |
| 2    | Supporter: member or potential member who supports the organizing campaign         |
| 3    | Member or potential member on the fence, needs follow-up                           |
| 4    | Opposes union and will never support the campaign                                  |
| 0    | Member or potential member not yet assessed                                        |



## Mapping the Workplace

### Mapping Tools

- Draw Your Own Workplace Map
- Make a Chart of Your Workplace
- Map How People Connect
- Analyze Your Workplace Map

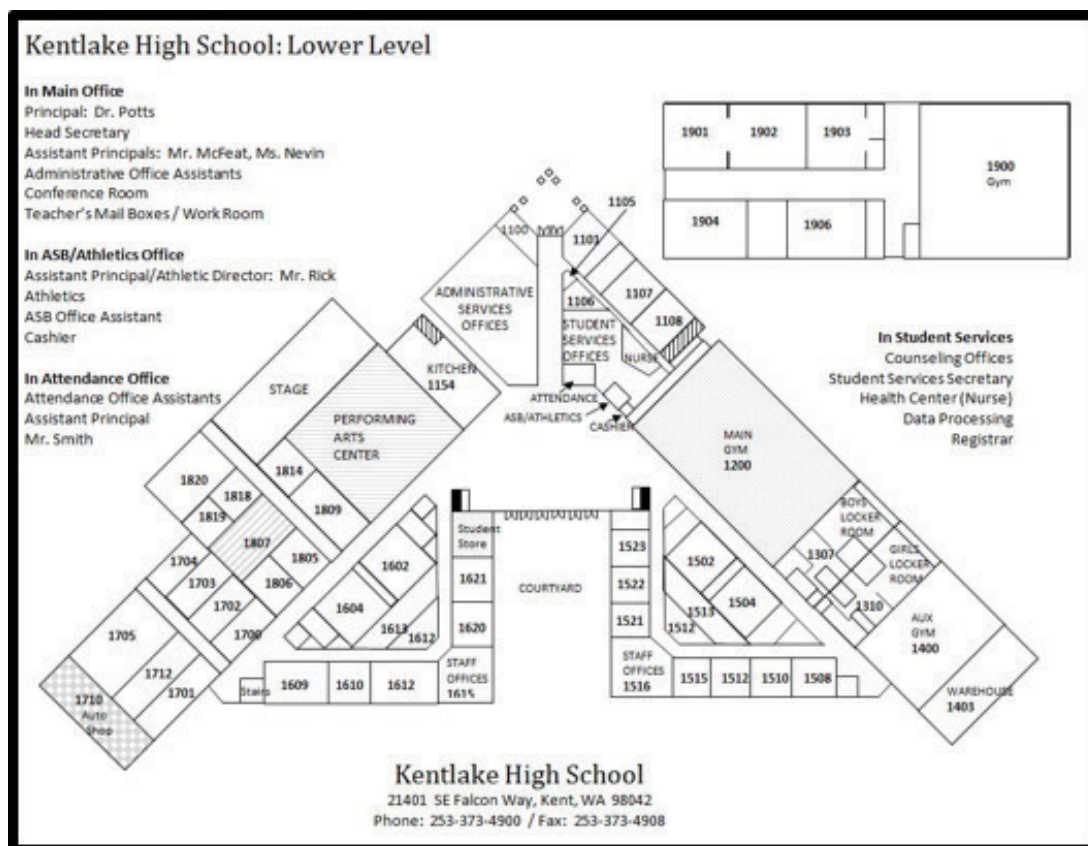
Mapping is a physical depiction of the worksite that illustrates presence and physical proximity of staff by such factors as membership or activist status, age/seniority, job title, assessment status, social relationships, etc.

Once created, a map gives us a look at selected data from a bird's eye view and provides a starting point for a strategic discussion of organizing.

- Map out where members/potential members are, supervisors/administrators, and every teacher, ESP member, etc.



- Find the worksite's "Hot Spots" and "Dead Zones."
- Find where conversations and action happens—where do people congregate throughout the work day?
- Check your map against your worksite rosters.





Also mark the wider circle of Union supporters.

Who signed the last petition?

Who is a member/potential member?

## Leader Identification

Fundamentally, a leader is someone who has followers. That means there are others who will take an action—sign the petition, wear the sticker, attend the rally—when this person asks. When conducting a one-on-one conversation and mapping the workplace, it is critical that we keep an eye out for natural leaders.

Leaders are people who:

- **Have a following.**

Leaders know other people in the community or in their building or district who share their concerns. Leaders identify other people who can be engaged in the Association/campaign and welcome new people readily.



- **Deliver.** If a leader promises to do something, he or she does it.

- **Are accountable.** Others in the organization or community care about what a leader is saying or doing on their behalf. Leaders check in with the people they represent.

- **Listen.** Leaders have their ear to the ground and take the time to ask other people what they need and what they think.

- **Motivate others.** Leaders bring out the best in other people.

- **Get respect and give respect.** Other people listen to leaders and view them as trusted colleagues.

- **Rise to the occasion.** In a crisis, others can count on leaders to respond.

- **Turn anger into action.** Leaders are comfortable expressing their dissatisfaction with oppressive people and institutions and are ready to direct their anger toward doing something productive.

- **Are hopeful.** Leaders believe that change is possible and that they have a role in creating their own future.

- **Understand self-interest.** Leaders know what is important to them and what they hope to achieve from building the organization. Leaders believe that working with others is how to get what they want.

## Map out how people connect

### Mark the groups.

Draw a circle around the people who form each work group and each social group. If members of a group are scattered all over, indicate them in some other way, such as with a certain color or symbol.

Who goes to the same place of worship?

Who socializes together?

Who works together?

Who are all the smokers?

Who carools together?

Who are the Spanish- speakers?

As you identify groups, discuss them.

How does this group relate to the administration?

What are the biggest problems affecting this group?

Keep your observations respectful and factual, not "gossipy." The idea is to find insights that will help you organize with these co-workers, not repeat stereotypes or gripes about them.

**Mark the leaders.** Indicate each group's leader with an appropriate color.

Who's the main leader in this group?

Who do you go to with problems?

**Map out union support.** Who is part of your organizing team so far? If there's not a formal group, choose some criteria.

Who gathered signatures on the latest petition?

Who's helping to map the workplace?

- **Want to build collective power.** Leaders know that building collective power is the way to create long-term solutions to building level, district level, and community social problems.
- **Have a sense of humor.** Leaders understand that humor sustains communities and individuals, and prevents bitterness and burnout. They may not be comedians or great joke-tellers, but they are able to find the humor in both the good and not-so-good aspects of everyday life.
- **Are natural role models.** Not all leaders have titles or hold elected offices, but they have a following amongst their peers.

#### **A leader is not necessarily:**

- The loudest person in the group.
- The person who speaks the most.
- The person with the most money or education.
- The person who is most interested in politics.



### **Building the Organizing Committee**

(Association/Building Representatives, Member Engagement Teams, Action Teams)

- Composed of a group of the most respected leaders in the workplace who are representative of the workforce. Both members and potential members.
- The Committee members are the organizers of the Association/Union in the building/school/ worksite.
- They work as a team and set goals and benchmarks for their work as organizers.
- They act as a group and not as individuals; always aiming to engage in collective action.
- They obtain and keep the necessary information to be able to reach their colleagues at any time.
- The building's organizing committee helps the Local put together the Local's organizing

committee.

- They identify potential leaders and engage co-workers in the activities of the Local.
- They will listen to their co-workers' issues and collectively will try to strategize for solutions.
- The members will be trained on collective action and will also conduct trainings as they become more familiar with the subject.
- They will be trained and will conduct one-on-one interviews with their colleagues, and will keep detailed records of those conversations.
- They are able to listen patiently, and when colleagues feel listened to they grow closer to the organization.
- They provide the same responses as other members when asked the same questions, and they are also able to say: "I don't know, but let me find out for you." They speak with one voice.
- The members of the Committee build solidarity in the workplace.
- They are trustworthy and keep confidences. They DO NOT gossip.
- They maintain a positive outlook when faced with a crisis and are always looking for an organizing opportunity; always reminding their co-workers that they can achieve much when working together.
- Committee members display good common sense when faced with adversity.
- They accept feedback and admit mistakes, but invariably look forward to making a change and not staying stuck in the error.
- They maintain a consistent message that is education centered and not tied to a political party or ideology based.
- Committee members will ensure their colleagues are informed of all Association/Union activities, regardless of membership status.
- They will have as a goal to gain buy-in from all the members and potential members working with the organization.





## Bargaining–Issue Campaign

### Organizing for Bargaining or Organizing for an Issue Campaign Tools

- Sample Contract Survey
- Organizational Readiness Checklist
- To React or Not to React
- Answering Tough Questions
- Practice Answering Tough Questions
- When You're Called into the Office

The outcome of bargaining, or meet and confer, places responsibility for the outcome directly on the membership, not just on the negotiator. The Association's bargaining leverage or contract influence is in direct proportion to the other side's perception of our strength.

Management decides how to respond to negotiators based on whether they believe the membership is involved, and to what extent the membership is prepared to take collective action. Public officials also respond to the level of organization involvement and to whether they will gain or lose politically.

### Campaign Budgeting

It's All About the Money!

**It's not enough to be right,  
you also need might.**

#### BARGAINING/CONTRACT NEGOTIATION: INTERNAL METHODS

##### STEP 1. Identify the Objective

In a contract campaign, the obvious objective is to win the best contract possible for the membership. Identifying make-or-break contract issues is essential.

##### STEP 2. Gather Information

###### 1. Survey the membership about contract and/or bargaining goals.

- One-on-one conversations
- NEA surveys
- Pencil and paper
- Online survey templates (such as [surveymonkey.com](https://www.surveymonkey.com))
- Listening tour



###### 2. Research school district's positions and financial capacity.

- Political climate
- Cost data
- Budgets and audits
- Decision-making structure

###### 3. Make comparisons.

- Emerging issues
- Past issues
- Districts/Locals of comparable size and financial situation

##### STEP 3. Develop an Action Plan

Members should clearly understand that bargaining and/or contract negotiating is being conducted by them, not for them.

###### 1. Select a bargaining/negotiating team.

- Team size
- Diversity
- Constitutional provisions
- Appointed vs. elected
- Criteria for team members
- Responsibility
- Authority

### **Interest-Based Bargaining: Collaborative**

This process encourages the parties to seek and find common interests of proposals, applying neutral standards in an attempt to reconcile their differences and reach common ground.

### **Traditional Bargaining: Confrontational**

This process involves negotiating specific proposals to reach an agreement through the application of pressure, utilizing such techniques as counter-proposals, compromise, and trade-offs.

#### **2. The team should agree on the philosophy about bargaining/contract negotiating.**

- Interest based vs. traditional
- Collaborative vs. confrontational
- Single spokesperson vs. group discussion
- Historical impact
- The will of the members

#### **3. Set bargaining goals.**

- Establish the difference between goals and priorities
- Short-term objectives
- Long-term objectives
- What are the employer goals?



#### **4. Plan for member involvement in the campaign.**

- Consider the impact of bargaining on membership recruitment and retention especially given the many ESP job categories
- Analyze past member involvement: Who? How?

#### **5. Create an issue theme.**

- Concepts like "safety in the workplace" mobilize workers more than a "2% wage increase"

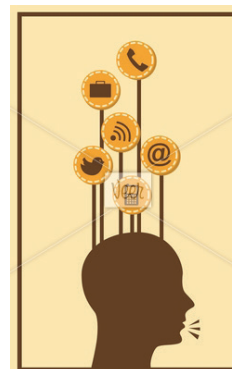
#### **6. Organize support teams—communications, crisis, research, website, newsletter, issues, etc.**

- Identify respected workers and volunteers at each worksite to organize/participate in support team activities
- Using one-on-one conversations, the teams survey the membership to identify issues and develop contract proposals

- The support teams ensure that workers know they "own" the issues campaign

#### **7. Plan communication strategies.**

- Internal or external
- Written vs. meetings or face-to-face
- Frequency of meetings/messages
- Detailed or general message
- Digital or print
- Social media



### **BARGAINING/CONTRACT NEGOTIATION:**

#### **External Methods**

- Bring the community to the contract table—in a time when parents, community, and educators have less and less say in how their schools are run, the Union contract is one place where we can authentically give parents and community members a voice
- Don't define the community in strictly geographical terms. People are drawn together by common interests, not just because they live or work together
- Social media

### **BARGAINING/CONTRACT NEGOTIATION:**

#### **The Media Campaign**

- Recruit among the membership the "poster child" members and prepare bios for release
- Train members on how to give interviews and stay on message
- Train members on how to put together a media package, how to write press releases, and how to do follow up after the release to ensure coverage
- Build relationships with the media/reporters months before they receive your first press release
- Use the time to educate them on the issues
- Examples of media tactics: ads in school football/basketball programs
- Meet with editorial board of newspaper
- Strategic press releases
- News conferences
- Free media: public service announcements, letters to the editor, public service airtime on radio or cable TV, radio call-in shows
- Social media

## Campaign Planning

### Campaign Planning Tools

- Local Association Campaign Planning Guide
- Choose Tactics that Fit
- Arrange Tactics
- Field Experience Toolkit
- Midwest Academy Strategy Chart
- Debrief Questions
- Wisconsin Education Association Council Tactics Manual

While individual organizing campaigns may serve different purposes—such as winning Union recognition and representation rights, increasing Union density by enlisting new members, electing pro-Union candidates to political office, establishing fair and effective accountability and performance standards, or achieving a decent contract—all organizing campaigns have the following common attributes:

- Start with an issue that resonates with members and the individuals and communities we are trying to reach.
- Follow a written plan that clearly states the immediate objective, its rationale, and relationship to achieving a larger long-term goal; how it will be accomplished and the leverage that will be used; a timeline with milestones and benchmarks; what members will be asked to do; and a work plan that specifies who will do what and when.
- Are conducted through a cohesive worksite structure characterized by a ratio approaching 1 trained worksite activist for every 10 unit members.
- Involve members by asking them in person and making participation easy.



- Record, update, and employ data for documenting member participation, measuring progress, and determining next steps.
- Draw from a common set of skills that includes list building, research, the organizing conversation, assessments, charting, mapping, leadership identification and development, and committee building.
- Employ strategies of escalating tactics for applying steadily increasing internal and external leverage to counteract opposition.

A winning strategy requires taking a comprehensive look at every internal and external source of leverage with the potential to affect the outcome of the campaign. Every prospective campaign should be viewed through a set of strategic considerations, such as member and community demographics, employer finances and governance, legal and regulatory environment, community and political power analysis, potential allies and opponents, affiliate readiness, and the role and likely impact of the media. It is an approach that requires research, education, and agitation for organizing and mobilizing our members, potential members, and allies.

## Building Power: The Campaign Debrief

### Power Tools

- Power Is the Goal
- Building Full Capacity Locals
- Sketch Out a Member Network
- Taking the Conversation Online
- Remember the Basics

During any organizing campaign, “debriefing” your site or home visits or phone calls is vital for continuous improvement and building power. Yet many times we still don’t do it. However, if we don’t take the time to properly review each event, we may miss critical opportunities to identify mistakes and grow.

Here are 3 tips to help you design an excellent debriefing process that can ensure your campaign’s success and help you to continue to grow as you plan for future campaigns.

#### 1. Set the Time(s)

Try to schedule your team debrief at the end of the day, following the site or home visits or phone calls. If this is not possible, try for no later than the next day. Timely debriefs can help detect if there are issues, enabling you to adjust before it’s too late.

The key takeaway? Debriefs are most successful when the details are still fresh in everyone’s mind. The longer you wait, the less you’ll recall and your learning could be severely impacted.

#### 2. Set an Agenda

No one on your team should be asking, “What are we here to talk about?” A good debriefing session is not a directive—it’s a conversation. So make sure your colleagues in the room know what you’ve gathered to talk about. What do they need to prepare? What do they need to bring?

#### 3. Learning, Not Finger Pointing

Always remember, a debrief is not a forum to complain. It is not an opportunity for people to air their dirty laundry and especially not to lay blame.

This is easier said than done, especially if things didn’t turn out very well that day. Emotions can run high and people can become defensive, but this can be a good thing. People get emotional because they care. They’re passionate about the work, have high standards for themselves, and are embarrassed if they perceive things weren’t



successful. Keep the debrief positive and focus on collective learning. Keep it grounded in the concrete details of the campaign...the what, how, and why. Start with the data and then talk about what happened, not who did it. Your path to answering the following questions will be much clearer.

1. What went well? What didn’t? Why?
2. What constraints or barriers did you face? How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the worksite?
7. Were you able to get to everyone given the different schedules and worksites?
8. How can we do better in the future?

Debriefing your events is a critical part of your entire campaign planning process. In fact, it is likely one of the more important aspects of the campaign and one that it often overlooked. By taking part in an active learning process, you’ll be better equipped to lead a successful campaign and continue to build Union power.

Articulating issues or demonstrating proficiency in the basic organizing skills alone no longer guarantees successful outcomes. Employers, “right-to-work” front groups, and political adversaries run comprehensive campaigns that employ sophisticated research, targeted messaging, community outreach, judicial and political intervention, community pressure, and the media to defeat worker power. We should not be any less equipped to carry the fight to them.



## Organizing for Community Support

### Community Organizing Tools

- Sample Member Community Organizing Survey
- Sample Checklist for Potential Community Contacts
- Living Wage Questionnaire

Developing allies in the community should be a priority for every Association. Community groups, parent organizations, religious leaders, politicians, and others are more likely to stand with us if we have identified issues of mutual concern and if we have a history of working together.

Education professionals are often active members of groups outside the school setting, from churches to political parties to volunteer organizations, and generally live within the communities where they work. Take the time to discover relationships that already exist between members and community groups. Members may live next door to or socialize with school board members or local politicians. They may be friends with local journalists at newspapers or radio and TV stations. We need to identify all relatives and relationships that our members have encompassing their respective school district. It is also important to identify all the connections that our members' close relatives and friends have to the communities where they live and work. Be especially mindful to determine parents and relatives who are vocal supporters of public education.

All of this information needs to be entered into your database. Being able to quickly identify sources of support will be vital in campaigns to pressure the employer to negotiate favorable contract terms or resolve workplace issues.



### Make a list of all potential community groups where your members are stakeholders, such as:

- PTA/PTO
- Booster clubs for bands, sports, cheerleading, high school glee club, etc.
- Boy Scouts, Girl Scouts, boys' and girls' clubs
- Little League, Pop Warner, soccer teams, etc.
- Book clubs, cooking clubs, etc.
- Places of worship
- Other charities

Keep adding to this list and remember to expand your community reach beyond your geographical boundaries.



# FUNDAMENTALS OF ORGANIZING RESOURCES

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The NEA Center for Organizing would like to extend our sincere gratitude to LaborNotes, the Midwest Academy and the Wisconsin Education Association Council, whose materials are reprinted here and which greatly enhance this toolkit.

# SECTION 1

## One-on-One Organizing Tools

## **ONE - ON – ONE**

### **The Relational Meeting: Purpose and Process**

- To develop a relationship with the person being interviewed
- To identify his/her concerns/issues
- To identify networks
- To evaluate leadership potential of interviewee
- To “agitate” (raise some questions) around issues that concern the interviewee
- Create an action to empower the interviewee

## **THE RELATIONAL MEETING: AN ART, NOT A SCIENCE**

A key organizing activity essential to issue organizing is the one-on-one interview, sometimes referred to as the one-on-one “Hit”. A broadening of the skills, purpose, and scope inherent in this issue organizing tool is required for the Relational Meeting, and activity essential to value based organizing.

### **A. Purpose of the Relational Meeting:**

1. To develop a relationship with the person being interviewed;
2. To build trust through a conscious sharing of stories;
3. To identify interests beyond the superficial level of the immediate issues at hand;
4. To identify his/her concerns/issues;
5. To identify networks
6. To evaluate leadership potential of interviewee
7. To “agitate” (raise some questions) around issues that concern the interviewee
8. Create an action to empower the interviewee

### **B. Preparation for the Relational Meeting:**

1. The organizer must know his/her own stories and which ones may be appropriate to share in a specific meeting;
2. The “frame” of the meeting must be considered-how to start and how to end;
3. Possible additional questions should be considered-
  - a. Why do you do your job?
  - b. Where do you want to leave your mark?
  - c. What drives you to care about...?

### **C. Organizer attitudes and behavior during the Relational Meeting:**

1. The meeting is a planned, non-task oriented dialogue;
2. The organizer seeks to develop common ground;
3. Curiosity is the motivation;
4. The organizer engages in strategic vulnerability;
5. Be interesting and interested;
6. Be empathetic

### **D. Follow-up tasks:**

1. Prepare notes from the meeting which summarize the participant’s background, job, history;
2. Identify areas of self-interest which were revealed with energy, conviction, emotion;
3. Reflect on where the participant’s interests might overlap with your own and the organization you work with.

## PROCESS

1. Call – Make an appointment or “schedule time to talk”.
2. Best meeting place is the interviewee’s work pace or home. (They will be more comfortable on their own turf.)
3. Begin with small talk to break the ice.
4. Frame the purpose of the meeting; (In general terms) tell the interviewee why you are there.
5. Agenda is the interviewee
  - a. What are their concerns, issues, reactions?
  - b. Don’t tell them, ask them. Don’t give them your program, let them tell you what they need and want or are willing to do!
  - c. Ask open-ended questions, elicit their responses/reactions.
6. **DON’T** go from question to question. Probe each question for more information. Encourage interviewee to expand on remarks. (Try to open them up)
7. Ask about networks. Identify power structure in their building or where they work. (Who else should I see? Why do you think I should talk to that person? )
8. **AGITATE** by asking questions that cause interviewee to think about issues.
9. Try to get some commitment from them, some follow-up action on their part. Set up a meeting, agree to talk to someone else, etc.
10. **DO NOT:**
  - ARGUE**
  - LIE OR INVENT**
  - TALK MORE THAN YOU LISTEN**

## **CHECKLIST FOR OBSERVING RELATIONAL MEETING**

1. How did the organizer frame the purpose of the meeting?
2. What kinds of questions were effective to initiate an examination of values, missions?
3. What shared stories were used? What purpose did they serve?
4. Which active listening skills were observed?
  - A. Eye Contact
  - B. Facial Expression(s)
  - C. Body Language
  - D. Restatement/Paraphrase
  - E. Summarization/Affirmation
5. Who seemed to be in control of the meeting?
6. Instances of agitation?
7. Elements of public drama?





# AN ORGANIZING CONVERSATION

Here are some guidelines for a fruitful conversation (or a series of conversations) with a co-worker.

Nobody should follow a script mechanically, of course. Talk with people like human beings! But think of this outline as a tool. The steps can help you move toward a goal, so your co-worker isn't left feeling like her time's been wasted with a spiel or a gripe session. Done right, an organizing conversation leads to action.

Your job is mostly to ask questions. You want your co-worker to realize:

- She cares about a problem.
- There's a decision-maker who has the power to fix this problem.
- The decision-maker won't fix it until someone pushes them to.
- If your co-worker really wants this problem fixed, she has to join you and other co-workers in taking action.

But just telling her all this wouldn't be very effective. Instead, you want to ask the right questions that get her to say it herself. We tend to remember what we said, not what the other person said.

## 1. DISCOVER THE ISSUES

Begin by asking questions—and listening to the answers—to learn what your co-worker cares about. Make your questions open-ended, especially when you're getting to know someone.

*How's your day going?*

*How did you get this job?*

*What was it like when you first started here?*

When you're organizing around a particular issue, your questions might get more pointed. Still, even if you have a petition about the awful new schedule, don't leap straight into "Will you sign this?" Instead, ask:

*How's the new schedule working for you?*

The point is for your co-worker to remind herself how she feels about this problem, before you ask her to act. If you've discussed this issue before, you can still ask how it's affecting her today, or share someone else's story and get her reaction.



## 2. AGITATE

React to what she tells you, and ask follow-up questions. By reacting, the organizer can help the other person feel she has permission to be angry:

*Wow. How long has that been going on?*

*How does that make you feel?*

*Is that okay with you?*

*How are you coping?*

*How is that affecting your family?*

## 3. LAY THE BLAME

Get her talking about who's responsible.

*Why do you think we're having this problem?*

*Who's in a position to fix it? What would they have to do?*

*Do you think this problem is going to correct itself?*

Many times we feel our problems are just “the way things are.” Realizing that bad conditions didn't fall from the sky can be empowering. If someone made the decision that caused this mess, that someone could also unmake it.

## 4. MAKE A PLAN TO WIN

Now that your co-worker is angry, it's time to offer some hope. Hope comes from your power in numbers and a winnable plan. That's how you make your problem into a problem for the decision-maker.

*Most people want to go back to the old schedule. The supervisor hasn't listened, but what if 25 of us sign this petition, and we all march into his office together to deliver it?*

*What do you think he'll do? Will he be able to keep ignoring us?*

*What's his boss going to say?*



This step will be trickier if today's petition doesn't address a problem that this person feels strongly about. You'll have an easier time organizing if you choose issues that are widely and deeply felt—we'll talk about that in Lesson 4.

But what you can say is that power in numbers is our only way to get a say on any issue. For instance:

*If we win on this issue, do you think management will learn something? Will taking action on the next issue be easier?*

*This is the first step. We've all got to start backing each other up. How else are we going to build enough power to fix the understaffing you're talking about?*

## 5. GET A COMMITMENT

Ask the member to be part of the solution by taking a specific action.

*Will you sign this petition and come with us to deliver it on Thursday?*

If someone is fearful, acknowledge that her fears have real reasons behind them. But still, things won't get better unless she gets involved. Your job isn't to convince her that she's wrong about her fears, but that she needs to act anyway.

*Is the schedule ever going to get fixed if we don't take action? Are you willing to let this problem go on?*

Helping her through it will be a lot easier when you're inviting her to act on what she's already said—not pushing an action you're trying to “sell.”

## 6. INOCULATE AND RE-COMMIT

Now your co-worker is committed—but does she know what she's getting into? Ask how she thinks management will react to the action.

*What do you think the supervisor will say when we go to his office?*



If there's a likely risk she hasn't thought of, warn her about it.

*What if he gets angry and threatens to write everyone up? What if he offers to meet with one or two of us but not the whole group?*

Talk through the possible outcomes. Then ask whether you can still count on her participation.

*Does any of that change your mind?*

This part might sound like you're undermining your organizing. You've gone to all this work to help your co-worker decide to act, and now you're trying to talk her out of it? But like inoculating against a virus, the idea is to help her develop an immunity to management's attacks—by giving her a small dose before she's exposed to the real thing.

This way, when management reacts, she won't be thrown by it. In fact, your correct prediction will boost your credibility.

## 7. SET A FOLLOW-UP PLAN

As organizer Fred Ross put it, "90 percent of organizing is follow-up."

Agree on the next step, and when you'll check back in. Maybe she's going to meet you Thursday to deliver the petition, or she'll ask two co-workers to sign. Or maybe you simply promise to report back on Friday about how the meeting went.

Remember, you're not just trying to pull off this one action. You're also trying to draw people gradually closer to the center and build an ongoing network of communication. You're trying to make standing up, in an organized way, a normal and natural part of workplace life.

*Can you ask Jane to sign? Great!  
I'll come back at the end of the shift to find out how it went, okay?*



## **Conducting a One-On-One Conversation**

### **Key Components**

1. The Introduction/Greeting
2. Getting the Story/Listening/Using Open-Ended Questions
3. Making Connections
4. The Ask
5. Thank You and Follow-up

Examples of open-ended questions:

What brought you into this work?

What excites you about working here?

What are some of the changes you would like to see in the workplace?

What worksite issues do you and your co-workers talk about the most?

It is important to remember that the "why" questions get to issues of values and interests. The "how" and "what" questions get to capacity and commitment.



## EXERCISE: PRACTICE THE ORGANIZING CONVERSATION

It can feel awkward at first, encouraging your co-workers to get mad and challenging them to face their fears. But like anything, it gets easier with practice.

If you're reading this in a workshop or as a group, pair up and practice the conversation. Take turns playing the role of organizer. If you're reading this on your own, ask an experienced organizer to be your partner, or recruit a friend or family member to try it out.

### REMEMBER THE STEPS

Ask about the other person's real job, whatever it is. Pretend you work there too, but you don't know much yet—maybe you're new. Have him give you a plausible setting for the conversation, such as the lunchroom. Ask him to do his best to answer your questions honestly, as if this were for real.

Start with **issues**. Ask as many questions as you can think of, to find out what he loves and hates about the work, what's changed over time, what he would fix if he had a magic wand. Don't rush.

When you think you've zeroed in on the issue he cares about most, move into **agitation** and **laying the blame**. See if you can get him to say out loud that he's ready to do something to solve this problem, and to name who's responsible.

Move into a **plan to win**, and inspire him with the idea of strength in numbers. Ask him to **commit** to a specific action. Do some **inoculation** about the risks and ask him to recommit. Set a **follow-up plan**, when you will be back in touch.

### HOW DID IT GO?

Afterwards, debrief with your partner. Find out how he felt about the conversation.

- Did you correctly identify his top-priority issue?
- What else could you have asked about?
- What parts of the conversation really made him think?
- What parts did he enjoy?
- If he agreed to take the action, why did he decide to do it?
- If he didn't, what could have made him reconsider?





# EXERCISE: WRITE YOUR OWN ORGANIZING CONVERSATION

Choose a real issue from your own workplace: \_\_\_\_\_

Choose a possible action you might organize to address it: \_\_\_\_\_

Choose a real co-worker: \_\_\_\_\_

Imagine you're going to approach him or her about joining you in action. You want to cover all the bases of a good organizing conversation. What questions would you ask at each step?

**1. Discover the issues.** Ask questions to learn what your co-worker cares about. Make your questions open-ended.

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**2. Agitate.** React to what she tells you, and ask follow-up questions. Help the other person feel she has permission to be angry.

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**3. Lay the blame.** Get her talking about who's responsible.

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**4. Make a plan to win.** How could you use your power in numbers to make your problem into a problem for the decision-maker?

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**5. Get a commitment.** Ask the member to be part of the solution by taking a specific action.

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**6. Inoculate and re-commit.** Does your co-worker know what she's getting into? Help her develop an immunity to management's attacks.

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**7. Set a follow-up plan.** Agree on the next step, and when you'll check back in.

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## **Worksite One-on-One Conversations Reporting Form**

Please return this form to. \_\_\_\_\_

as soon as possible after conducting the one-on-one interviews.

Your name: \_\_\_\_\_

Your worksite: \_\_\_\_\_

Names of members/ potential members you met with: \_\_\_\_\_

Dates of conversations:

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### **Tally**

Number of unit members at your worksite: \_\_\_\_\_

Number of unit member 1-1 conversations you held: \_\_\_\_\_

## General One-on-One Conversation Reporting Form

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

TELEPHONE \_\_\_\_\_ PERSONAL CELL \_\_\_\_\_

PERSONAL EMAIL \_\_\_\_\_

JOB CLASSIFICATION \_\_\_\_\_

YEARS IN THE COMMUNITY \_\_\_\_\_

ORGANIZATIONAL AFFILIATIONS (ie, Book Clubs, Women's Clubs, Brownies, Boy Scouts, Little League, Bowling League, Volunteer work, Sport's Clubs, Extra Curricular Activities, VFW, etc)

\_\_\_\_\_  
\_\_\_\_\_

HOW MANY RELATIVES/GOOD FRIENDS DO YOU HAVE IN THE COMMUNITY AND IN WHAT ORGANIZATIONS DO THEY PARTICIPATE?

\_\_\_\_\_  
\_\_\_\_\_

PLACES OF WORSHIP

\_\_\_\_\_  
\_\_\_\_\_

WHAT OTHER CO-WORKERS SHOULD WE TALK TO ABOUT THIS ISSUE?

\_\_\_\_\_  
\_\_\_\_\_

ISSUES/COMMENTS/SKILLS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RATINGS

- 1) WILL DO ANYTHING FOR THE ISSUE
- 2) SYMPATHETIC
- 3) FENCE STRADDLER
- 4) OPPOSED



# HOW TO BE A GOOD LISTENER

- **Avoid distractions.** Look the other person in the eye, and put your phone away.
- **Slow down.** Our brains process thoughts four times faster than spoken words. It's easy to skip ahead in a conversation, using your assumptions to fill in the gaps and plan your response. Resist this urge. Focus on what is actually being said.
- **Don't interrupt.** Take the time to hear the full story.
- **Keep an open mind.** Don't assume you already know what someone cares about. People will surprise you.
- **Don't fish.** Avoid leading questions like "Don't you agree that..."
- **Practice empathy.** Sometimes people need to let off steam. Don't discourage them. Your immediate task is to hear what they have to say, not to judge.
- **Show that you hear what they're saying.** React, ask follow-up questions, and repeat back what you understood. If you don't understand, ask.
- **Find common ground.** You don't have to agree with every point, but look for areas of agreement, and acknowledge where you differ.
- **Don't feel you need to sell something.** An organizer is not a salesperson. You're genuinely looking to learn the other person's point of view and create something new together.





## A.H.U.Y. THERE!

The acronym “A.H.U.Y.” is a helpful shorthand for what it takes to move someone to act:

**Anger:** This is an injustice. We have to fix this.

**Hope:** Change is possible. We can fix this. Here’s our plan.

**Urgency:** Now’s the time. We can’t wait any longer.

**You:** can make a difference. Your participation matters.



# SECTION 2

## Issue Identification Tools

## Checklist for Deciding on an Issue

A good issue will meet most of these values.  
Use this checklist to compare issues. You may decide to modify or add to this list.

| <i>Issue 1</i> | <i>Issue 2</i> | <i>Issue 3</i> | <b>Will the Issue:</b>                                                                                             |
|----------------|----------------|----------------|--------------------------------------------------------------------------------------------------------------------|
|                |                |                | 1. Result in a real improvement in the lives of students, school staff, and community members                      |
|                |                |                | 2. Give people a sense of their own strength                                                                       |
|                |                |                | 3. Alter the relationships of power                                                                                |
|                |                |                | 4. Be worthwhile                                                                                                   |
|                |                |                | 5. Be winnable                                                                                                     |
|                |                |                | 6. Be widely and deeply felt                                                                                       |
|                |                |                | 7. Be easy to understand                                                                                           |
|                |                |                | 8. Identify the decision-maker                                                                                     |
|                |                |                | 9. Have a timeline that works for your group                                                                       |
|                |                |                | 10. Not be divisive                                                                                                |
|                |                |                | 11. Build leadership                                                                                               |
|                |                |                | 12. Be consistent with the group's values and vision in support of public education and public education employees |



## A GOOD ORGANIZING ISSUE...

- **...is widely felt.** How common is the problem? How many workers face this situation? Many people must feel that this is a real problem and agree with the solution you're pursuing.
- **...is deeply felt.** Is this an issue that people feel strongly enough about to actually do something? It's not enough that many people agree, if none are really hot under the collar.
- **...is winnable.** It's hard to know for sure whether you will win, but it's possible to have a good idea whether you can. Your group should match your demand to the power you've already got.

To win, you'll need to make it harder for the decision-maker to keep saying no than to say yes. The more pressure you can bring to bear, the more issues will become winnable.

- **...builds the union and builds leaders.** Consider how this fight will build your capacity for future fights. Will the issue attract leaders or groups who haven't been very involved? Will it build solidarity between groups? Will it give you the chance to try an action that's one step beyond what you've done before? Will the solution lay the groundwork for future improvements?

Each fight should build off the last. It often happens that we don't win the concrete gain wanted, but we do come out smarter and better organized—which makes it more likely we can win next time.



## Issue Selection

### Checklist for Choosing an Issue:

A good issue is one that matches most of the following criteria. Use this checklist to compare issues or develop your own criteria and chart for choosing an issue.

| Issue 1 | Issue 2 | Issue 3 | Will the Issue...                                  |
|---------|---------|---------|----------------------------------------------------|
|         |         |         | 1) Win real improvement in people's lives          |
|         |         |         | 2) Give people a sense of their own power          |
|         |         |         | 3) Alter the relations of power                    |
|         |         |         | 4) Be worthwhile                                   |
|         |         |         | 5) Be winnable                                     |
|         |         |         | 6) Be widely felt                                  |
|         |         |         | 7) Be deeply felt                                  |
|         |         |         | 8) Be easy to understand                           |
|         |         |         | 9) Have a clear target                             |
|         |         |         | 10) Have a timeframe that works for you            |
|         |         |         | 11) Be non-divisive                                |
|         |         |         | 12) Build leadership                               |
|         |         |         | 13) Set your organization up for the next campaign |
|         |         |         | 14) have a pocket book angle.                      |





## EXERCISE: EVALUATE AN ORGANIZING ISSUE

Have you started mulling over some possible organizing issues at your workplace? Pick one, and answer these questions to help you think through its organizing potential.

### 1. What's the problem?

### 2. What's our proposed solution?

### 3. Is this issue widely felt?

- How many people are technically affected by the problem?
- How many people feel like it affects them?

### 4. Is it deeply felt?

- How much do people care about the issue?
- What are they willing to do about it?

### 5. Is it winnable?

- Who's the decision-maker who could say yes to our solution?
- What would it cost this person to say yes? Consider not just the budget but also the decision-maker's personal or political investment in the issue.

### 6. How much pressure will we have to bring to overcome this person's resistance?





## GETTING THE BALL ROLLING

Say there's a problem where you work. Maybe you have a supervisor who humiliates someone in front of co-workers. You've tried reasoning with him, but nothing changes. You want to do something.

- **Think clearly about the problem** you're facing. Try to get past the emotion—the anger, resentment, shame, or whatever you're feeling about it. Write down the simple facts.
- **Resist the urge** to act only on emotion, or to do something all by yourself. That's often when you're most vulnerable, and you might make more trouble for yourself than for the boss. Instead, take a deep breath and reach out to co-workers.
- **Find someone at work you trust**, and share the facts you've written down. Ask for an honest opinion. If you both agree that this is a serious problem, see if you can come up with the names of other co-workers who are affected, too.
- **Talk one on one** with these other people. So far, you're just checking to see if others agree with you, not deciding what you're going to do about it.
- **Some people will be more concerned than others.** Don't be discouraged. Keep talking—without pestering people—until you find even one person who shares your desire to do something.
- **If you find a small handful of co-workers** who share this problem, get them together, perhaps over a cup of coffee during your break. First share your fears about what could happen if your group did something. Then, talk about what will happen if you do nothing. This will usually help make up your mind to do something! Then start talking about steps you could take.
- **Figure out together** who in management is the decision-maker on the issue. Does this boss know about the problem? How could you approach the boss, collectively? What are the risks and advantages of different approaches?
- **Check your workplace map** from Lesson 3. Think about who's involved so far, and who else you'll need to involve in order to win. Are there key leaders you want to involve early on? Who in your group should approach them, and what approach might work best?
- **Use the information** in Lessons 4 and 5 to make a plan. Take small steps to build your trust as a group. This is the best way to overcome fear.





# SECTION 3

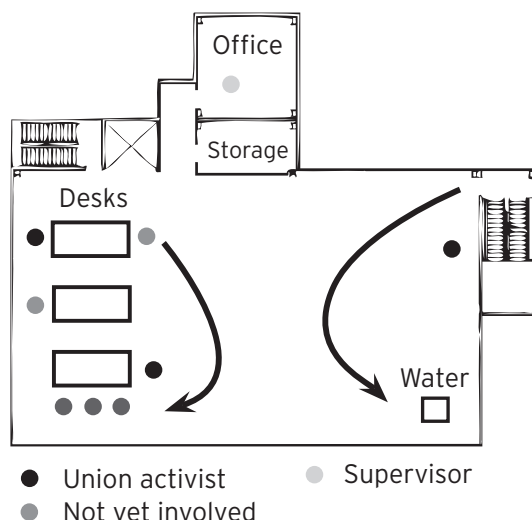
## Mapping Tools



# EXERCISE: DRAW YOUR OWN WORKPLACE MAP

## You will need:

- Butcher paper
- Color markers
- Sticky dots



**Start with the physical space.** First, use a flipchart or large sheet of paper and a black marker to outline the area or building, showing entrances, exits, and windows. Label the offices, production lines, storage areas, shipping and receiving docks, lunchrooms, and bathrooms.

Add details such as machines, desks, and water coolers. If the building is large, make maps of different areas. Be sure the map is large enough to show the information clearly.

**Add motion.** Draw the flow of work or production, and/or the paths that different people take through the space regularly, in different colors.

Are there spots where the flow of work tends to get bottlenecked? These could be important pressure points. Who works there?

Are there places where people congregate, like the break room or the proverbial water cooler? These could be good places for outreach conversations, or group gatherings.

**Add all the people.** Sticky dots work well to represent workers. You might use different colors to indicate supervisors, union activists, various jobs, or shifts. Mark the dots with initials or names.

## CAN YOU GET A LIST?

It's best to work from a list of all employees in your workplace or department (whatever you're mapping). Otherwise it's surprisingly easy to forget people, especially those you don't work closely with, part-timers, or those with unique jobs.

Maybe you can get this list from your union office, especially if you're a steward. If not, is there a list at work you can discreetly copy or take a picture of? The boss may distribute an emergency phone list, or post a schedule. Be resourceful.





## EXERCISE: MAKE A CHART, TOO

In some workplaces, everyone moves all over the place, and a physical map would be a hopeless jumble. In that case, make a chart instead.

Even if you made a map, you'll find a chart helpful too. Charts are easy to update and allow you to see at a glance where your union is weak and where it's strong. Make a big version to display on the wall. Enter the same information into a spreadsheet you can print out and carry around with you.

**Make a grid.** You might use columns for different work areas or job titles, and rows for shifts.

**Write in all the names.** Some organizers include cell phone numbers and email addresses, to have all the info in one place.

**Map the groups and leaders.** As with the map, use colors and symbols to map out formal and informal connections. Discuss the same questions.

**Color code the chart.** Depending on your goals, you might highlight all the people who have committed to a rally, signed a petition, or worn a button.

**Keep updating.** Continually revise your chart. Track how people's union roles and relationships change.

**SAMPLE CHART**

|       | Dishwashers                                            | Room Service                                         |
|-------|--------------------------------------------------------|------------------------------------------------------|
| Day   | Heather A.<br><i>Heather@gmail.com</i><br>617-555-1212 | Ana E.<br><i>Ana@aol.com</i><br>??                   |
|       | Jose B.<br><i>Jose@gmail.com</i><br>718-555-1212       | Mark F.<br><i>Mark@aol.com</i><br>908-555-1212       |
| Swing | Rose C.<br><i>Rose@gmail.com</i><br>206-555-1212       | Charlie G.<br><i>Charlie@aol.com</i><br>434-555-1212 |
|       | Brad D.<br><i>Brad@gmail.com</i><br>808-555-1212       | Lauren H.<br>??<br>??                                |





## EXERCISE: MAP OUT HOW PEOPLE CONNECT

**Mark the groups.** Draw a circle around the people who form each work group and each social group, using different colors. If members of a group are scattered all over, indicate them some other way, such as with a certain color or checkmark.

*Who works together?*

*Who are all the smokers?*

*Who carools together?*

*Who are the Spanish-speakers?*

As you identify groups, discuss them.

*How does this group relate to management?*

*What are the biggest problems affecting this group?*

Keep your observations respectful and factual, not gossipy. The idea is to find insights that will help you organize with these co-workers, not repeat stereotypes or gripes about them.

**Mark the leaders.** Indicate each group's leader with an appropriate color.

*Who's the main leader in this group?*

*Are there other leaders in this group?*

**Map out union support.** Who's part of your organizing team so far? If there's not a formal group, choose some criteria.

*Who gathered signatures on the latest petition?*

*Who's helping to make this map?*

Also mark the wider circle of union supporters.

*Who signed the last petition?*

*Who is a dues-paying member?*





## EXERCISE: ANALYZE YOUR WORKPLACE MAP

**Discuss your map.** You now have a great deal of information about interactions in your workplace. This is a good place to stop and ask yourselves:

*What do you see?*

Even when people know their workplace well, the map will help them see it with new eyes. Ask open-ended questions.

*What's going on here?*

*Do we see any patterns?*

*How does news travel?*

*What new questions does this map raise?*

The stories that come out will be about issues that are bothering people. Keep adding to the map, marking which workers are being harassed by management, for instance, and which are facing layoffs. If the map gets too crowded, start tracking the information another way.

**Use your map to identify areas and leaders to focus on.** Making workplace dynamics visible puts valuable information on the table.

*See this group over here, the one we've never had contact with? Who can talk to someone in that group?*

The next time you go to work, look around and compare the reality to your map.

*Did we overlook anyone?*





# SECTION 4

Organizing for Bargaining or Organizing  
for an Issue Campaign Tools

## Sample Contract Survey

This sample survey illustrates some principles about survey design. It certainly doesn't cover all the subject areas a real survey would cover. Obviously, you will have to prepare your own to suit your particular group of workers. How you structure the questions will depend on your plan for analyzing the answers.

### What Do You Want to Bargain For?

#### Local 000 Contract Campaign Survey

Our Local Association has launched our campaign for a new contract.

The first step is to find out what we, the members, want. You can help by returning this survey and by one of the meetings listed below.

As you know, what we win this year will depend on our active involvement as Association members. Our bargaining team is only as strong as the membership standing behind them.

That's why the second page of this survey asks you to check those activities you are willing to help with.

Please return the survey to your contract campaign committee member or the Association office by

Date: \_\_\_\_\_

Name \_\_\_\_\_

Job \_\_\_\_\_

Job Title \_\_\_\_\_

Full-time? \_\_\_\_\_ Part-time? \_\_\_\_\_ Other status \_\_\_\_\_

Home address \_\_\_\_\_

Work phone \_\_\_\_\_ Home phone \_\_\_\_\_

Cell phone \_\_\_\_\_ Personal email \_\_\_\_\_

**1. Wages** (check only one)

- ☐ Equal dollar increases for everyone . How much? \_\_\_\_\_
- ☐ Equal percentage increases for everyone. How much? \_\_\_\_\_
- ☐ A percentage raise with a minimum or floor (example: 5% or \$ 100 per month, whichever is greater) What percentage? What minimum? \_\_\_\_\_

**2. Time Off** (check only one)

- ☐ Not a priority
- ☐ More sick leave How much? \_\_\_\_\_
- ☐ More vacation How much? \_\_\_\_\_
- ☐ More holidays? When? \_\_\_\_\_

**3. Scheduling** (Check no more than two)

- ☐ Not a priority
- ☐ Eliminate mandatory overtime
- ☐ Eliminate rotating shifts
- ☐ Increase required notice for overtime from one day to \_\_\_\_\_
- ☐ Standardize starting and quitting times
- ☐ Negotiate optional 4 day/10 hr. schedules where feasible
- ☐ Negotiate a voluntary reduced hours option
- ☐ More worker choice in starting and quitting times

**4. Priorities**

The major issue areas are listed below. Mark 1 next to the most important to you, 2 next to the second most important, and so on.

- \_\_\_\_\_ Wages
- \_\_\_\_\_ Health Benefits
- \_\_\_\_\_ Retirement Benefits
- \_\_\_\_\_ Scheduling
- \_\_\_\_\_ Contract Length
- \_\_\_\_\_ Health and Safety Rights
- \_\_\_\_\_ Career Ladders/Training Opportunities
- \_\_\_\_\_ Job Security

### 5. Other Concerns

Use the space below to describe any other job-related problems that you think should be dealt with in contract negotiations. Possible subjects might include inequities or discrimination, workers' rights, health and safety, workloads, job classifications, promotional opportunities, grievances, or other working conditions. If you have ideas for possible solutions, be as specific as you can. Use additional sheets of paper if necessary.

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### What We Win Depends on You

The Association can't win a good contract for us, because ***we are the Association.*** Now that you've thought about priorities for bargaining, please indicate which responsibilities you can take on to help build our negotiating strength. Your contract campaign committee will be contacting you with more details.

- ☐ Serve on contract campaign committee (coordinates bargaining support activities)
- ☐ Distribute leaflets when needed to my co-workers
- ☐ Be part of a phone tree to contact 5 other workers when our representatives need to get a message out quickly
- ☐ Attend rallies or special events to show we support our negotiators
- ☐ Be trained to speak to community groups about our proposals
- ☐ Help with research to develop and support our bargaining proposals
- ☐ Other ways you can help (please explain)
- ☐ Social Media \_\_\_\_\_

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## Organizational Readiness Checklist

This organizing and bargaining checklist is intended to help the local Association as it prepares for bargaining and develops strength through organizing. It may be adapted to fit local circumstances. Some items, even if initially completed, may require ongoing adjustment and revision.

If the local is planning to request WEA crisis assistance and funding, a copy of the completed assessment should be forwarded to the Advocacy and Organizing Center, Attn: Mike McNett.

The checklist is designed to ensure that each local is adequately prepared in the following key areas.

- A regular communications program that listens to members about their needs and goals, engages them as active participants, and keeps them informed throughout the process;
- A knowledgeable, well-trained bargaining team;
- A structure, including a Bargaining Support Team, to build and channel the power of members and Association allies in the broader community through organizing.
- To accept, in a pre-crisis or crisis situation, professional staff support to advise and work with local leaders, which will entail changes in leaders' and bargaining team members' roles, responsibilities and decision-making

| Yes                      | In-Process               | No                       | Bargaining Issues                                                                                                                                                                           |
|--------------------------|--------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1. Bargaining team has attended training.                                                                                                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 2. Bargaining team roles have been clearly assigned.                                                                                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 3. UniServ staff is involved in the bargain and is familiar with the proposals.                                                                                                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4. Association is communicating regularly with a coordinated bargaining cluster, has made proposals consistent with the goals of the CBC, and is engaged in disciplined pattern bargaining. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5. Bargaining blueprint or comparable plan has been completed.                                                                                                                              |

| Yes                      | In-Process               | No                       | Research                                                                                                                                                                                |
|--------------------------|--------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 6. The school district monthly budget status reports have been examined.                                                                                                                |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7. A detailed analysis of the school district budget has been completed.                                                                                                                |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 8. A group of comparable districts has been developed.                                                                                                                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 9. Relevant language in the comparable contracts has been compiled.                                                                                                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 10. Association leaders are familiar with processes in their constitution and bylaws regarding calling and announcing membership meetings and conducting strike and ratification votes. |

| Yes                      | In-<br>Process           | No                       | Assessments of Members                                                                                                                                                     |
|--------------------------|--------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 11. Membership has been surveyed (through one-on-ones, focus groups and/or bargaining survey) to determine bargaining issues.                                              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12. Survey results have been communicated to the membership.                                                                                                               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 13. The bargaining team has done a follow-up survey on the bargaining issues, if needed.                                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 14. Further issue assessments have been done by worksite.                                                                                                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 15. Contact has been made with special interest groups within the Association in an effort to solicit their support.                                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 16. Members at each worksite have been talked with or surveyed to determine member readiness to participate in various tactics. <b>If yes, attach results by worksite.</b> |

| Yes                      | In-<br>Process           | No                       | Organizing                                                                                                                                                                            |
|--------------------------|--------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 17. UniServ staff is involved with the organizing.                                                                                                                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 18. An organizing/bargaining support team has been established and is meeting.                                                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 19. Association has established a bargaining/organizing timeline that applies the necessary negotiations and expression of power to gain a settlement within a reasonable time frame. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 20. The person or persons making bargaining decisions on behalf of the employer has/have been identified and researched.                                                              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 21. A series of escalating actions has been designed to influence the district's decision-maker(s) to agree to a favorable settlement.                                                |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 22. Individuals who can strongly influence the district's decision-maker(s) have been identified.                                                                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 23. June general membership meeting is scheduled or has taken place.                                                                                                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 24. August general membership meeting is set and has been communicated to the membership.                                                                                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 25. Contact list for new hires is complete.                                                                                                                                           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 26. New hires have been contacted by the local.                                                                                                                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 27. District information is complete from strike manual: superintendent information, school board information, district bargainer information, etc.                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 28. List of other district employee unions and leadership is completed (home phone, cell phone, e-mail, etc.).                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 29. School district and work site maps are on file.                                                                                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 30. Worksite organizers (could be building reps) have been identified and trained.                                                                                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 31. A member skill and talent list has been compiled.                                                                                                                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 32. Membership has participated in some form of organizing activity (sign building, leafleting, phone calling, etc.).                                                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 33. A power analysis of the district and community has been completed.                                                                                                                |

| Yes                      | In-Process               | No                       | Organizing                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 34. Allies have been identified in the community, including groups and individuals. <ul style="list-style-type: none"> <li>• The local has identified members with established contacts with these potential allies.</li> <li>• Initial contact has been made with the allies to discuss how their interests intersect with those of the union.</li> </ul> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35. Members and parents who can be named in affidavits have been identified.                                                                                                                                                                                                                                                                               |

| Yes                      | In-Process               | No                       | Association Resources/Budget                                                                                                                                                                                                      |
|--------------------------|--------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 36. Money is available in the Association budget for tactics, organizing, and pre-crisis pressure. <b>How much?</b> \$ _____                                                                                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 37. Attach local Association budget.                                                                                                                                                                                              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 38. Determine from bylaws the procedure for making expenditures, and be prepared to expedite this process and manage required timelines.                                                                                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 39. Review WEA Crisis Funding Policy application process (in Strike Manual) and be prepared to enter into the agreement. The funding policy requires local matching funds and potential changes in the decision-making structure. |

| Yes                      | In-Process               | No                       | Communications                                                                                                                                                                                                                    |
|--------------------------|--------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>INTERNAL</b>          |                          |                          |                                                                                                                                                                                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 40. Issues have been framed and bargaining unit members are well informed about negotiation issues.                                                                                                                               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 41. The “message” has been developed for use in communications and organizing.                                                                                                                                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 42. Information about bargaining is disseminated regularly via newsletter or email, both after each bargaining session and at predetermined strategic intervals.                                                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 43. Member list, by building, has been completed (home phone, cell phone, home e-mail, summer addresses, etc.).                                                                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 44. The local has a system in place by which to send email to each member’s home email address.                                                                                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 45. Expectations and method for effective summer communications established.                                                                                                                                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 46. Social media tools your local will use for the bargain analyzed and established. <ul style="list-style-type: none"> <li>• Facebook</li> <li>• Twitter</li> <li>• Texting system</li> <li>• Website</li> <li>• Blog</li> </ul> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 47. The Local’s website and/or blog and Facebook pages have been updated to include a persuasive portrayal of the union’s position and message. Trusted individuals are designated to post regular updates.                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 48. The school district’s financial condition has been communicated to Association members. <b>Describe when and how.</b>                                                                                                         |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 49. Organizing/information meetings have been held regularly with building reps and/or organizing/bargaining team members.                                                                                                        |

| Yes | In-<br>Process | No | Communications |
|-----|----------------|----|----------------|
|-----|----------------|----|----------------|

**INTERNAL**

- |                          |                          |                          |                                                                                     |
|--------------------------|--------------------------|--------------------------|-------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 50. Bargaining team members and/or Association officers have made building visits.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 51. A cell phone tree is established for each worksite or zone and has been tested. |

| Yes | In-<br>Process | No | Communications |
|-----|----------------|----|----------------|
|-----|----------------|----|----------------|

**EXTERNAL**

- |                          |                          |                          |                                                                                                                                          |
|--------------------------|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 52. An email list for community mailings has been compiled.                                                                              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 53. A community communications plan has been developed using the Association's message and appealing to the self-interest of the public. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 54. A media contact list for Association communications has been prepared.                                                               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 55. Members of the media have been contacted and briefed on bargaining issues.                                                           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 56. Association news media fact sheet complete.                                                                                          |





## TO REACT, OR NOT TO REACT?

If management puts out a “fact sheet” filled with lies, how should you respond? It can be tempting to thoroughly refute every point, but you should stop and think before going down that rabbit hole.

Management is trying to distract and confuse. If derailing works, they’ll keep it up, supplying more lies as quickly as you can debunk them. When you’re on the defensive, you are—for the moment—losing.

Avoid dignifying an attack with a written response. Co-workers may be looking to you for cues on whether to take it seriously. You want to keep the focus on your issues, not their attacks.

So when should you react? Essentially, when you have to. If management is successfully changing the subject, then you may need to respond to what they’re saying, in your flyers and conversations. The goal is to put out the fire and bring the focus back to your issues.

Remember, your campaign won’t be won with dueling flyers, but with one-on-one conversations through the communication network you’ve been building. Management has enough money and personnel to out-flyer you, but you’re the ones who are trusted shop floor leaders.

**Do not** respond to the boss’s message just because:

- It’s infuriating.
- It’s a lie.

**Do respond** if:

- It’s getting traction—people you care about are talking about it.
- It’s closing people off to your message.





# ANSWERING TOUGH QUESTIONS

On paper and in person, keep the focus on your message. When people come to you riled up over the spin from management, a good way to respond is “Affirm, Answer, Redirect.”

**Affirm:** Let them know you’re listening, you understand, and their feelings are valid. Your co-workers may be scared or upset by what they’ve heard. Don’t get mad at them. It’s management’s fault, not theirs.

*I hear you, I don’t want to lose money either!*

**Answer:** Give a truthful, concise answer to the question. Don’t be evasive. If there’s a grain of truth to management’s message, say that up front.

*Yes, it's true that we could end up paying more for healthcare and this is a serious issue, but we need additional information before we speak to the membership.*

If you don’t know the answer, don’t guess. Tell them you’ll find out and get back to them. Make sure you follow through, to maintain trust.

**Redirect:** But once you’ve answered the question, don’t get bogged down in too much back-and-forth about it. Instead, be ready with a question that brings the conversation back to your message and points out what management is trying to distract them from.

*If they're so concerned about our pocketbooks all of a sudden, why haven't they given us a raise for two years?*

Remind your co-workers of the issues that inspired them to organize in the first place. Ask whether that’s changed. Steer the conversation back to the plan to win, and the next steps.





## EXERCISE: PRACTICE ANSWERING THE TOUGH QUESTIONS

1. Pick a message management has used, or might use, to undermine your campaign. If there's a concern that's already been getting traction with your co-workers, use that one. Write the concern the way a co-worker might phrase it: \_\_\_\_\_

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2. Now write what you would say to answer it, using the three steps:

**Affirm:** Let them know you're listening, you understand, and their feelings are valid.

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**Answer:** Give a truthful, concise answer to the question. If there's a grain of truth to management's message, say that up front.

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**Redirect:** Be ready with a question that brings the conversation back to your message and points out what management is trying to distract them from.

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3. Practice out loud with a friend.





## WHEN YOU'RE CALLED INTO THE OFFICE

If managers start cornering individuals, how can you prepare people? Warn them what to expect. It's helpful to role-play how a one-on-one meeting might go.

Advise your co-workers that there's no need for heroics. Arguing with your supervisor about your campaign won't help. The supervisor's goal is either to intimidate you or to find out information, such as who the leaders are.

Here are some good practices to follow any time you are called into the office:

- **Assert your Weingarten rights.** If you have a legally recognized union in the private sector (even if you don't have a contract yet), you have the right to have a steward present in any meeting that could lead to discipline. (Many public sector unions have similar protections in state law or contracts.)

So any time you start to feel intimidated, ask your supervisor directly: "Will this meeting lead to discipline?" If she says anything but "no"—including "yes," "maybe," "we'll see," or "I don't know yet"—tell her you want a steward present, as is your right.

- **Take notes on what the supervisor says**, especially if you think she might be violating your rights. (For instance, questions about your organizing could be illegal surveillance of union activity. Consult your union officers or a lawyer.)

Note-taking during the meeting could make the supervisor nervous enough to rein in her behavior—or it could make her mad enough to escalate. Gauge your particular supervisor. If not during the meeting, be sure to make a written record immediately afterward.

- **Answer questions** related to your work, but don't volunteer extra information you weren't asked.
- **Debrief soon afterwards** with a steward or core group member. This gives the steward a chance to make sure you're okay, find out if your rights were violated, answer any new fears or doubts management has planted, and gather intel on what management's up to.



# SECTION 5

## Campaign Planning Tools

# Local Association Membership Campaign Planning Guide

Use this template to assist your local association plan and lay out your membership campaign strategies and tactics. Your membership plan should take the form of a written document listing a range of elements and how each element will be developed and communicated. This template is offered to give you guidance but does not require you to follow this suggested format or sequence. When using this template, we suggest that it be a participatory process among leaders and other stakeholders in your local association in order to maximize involvement of your activists and rank and file members. This is a work in progress and we welcome your feedback in order to make this template more beneficial for local associations.

## Background and History of Local Association

*Give a brief history of your local association. Include information on leadership, involvement among members, relationships with key stakeholders, successes and accomplishments your local association has seen as well as failures and losses. Also list any membership growth or loss your local has seen in the last 10 years.*

## Local Association Situational Analysis and Assessment

*Discuss the current situation your local association is in. What political, economic/financial, cultural, or other factors are creating challenges or opportunities for your local association and members? What problem is your local association faced with currently and what problems do you foresee in the next year? Identify both internal and external strengths and weaknesses your local association has.*

## Message and Issues to Organize Around

*List potential issues you might be able to use throughout the year-round campaign that will be universal to both members and potential members. Present prospective messages that might work to generate urgency among both internal and external audiences. Remember, messages often need to be tailored to fit differing populations.*

## Year-round Membership Campaign Objectives and Goals

*Develop the goals and/or strategies for your year-round membership campaign. You should include more than just being on the winning side of an issue. Your local should look to build capacity with every campaign. It should also look to frame the campaign issues to better ensure you can deliver on the local's agenda in future campaigns. What specific and tangible outcomes do you aim to achieve? List out what kind of benchmarks your local will use to determine success. Your objectives should be strategic, measurable, achievable, realistic, and time specific. Your objectives and goals should be both qualitative and quantitative.*

Qualitative: *Will you provide engagement opportunities for current members? Will you provide training for leaders and members on issue organizing at the site level? Will you try to build a foundational infrastructure at worksites? Will you begin to identify the "next generation" of leaders for your local? Will you build better relationships with community groups or the district?*

Quantitative: *How many new members would your local like to recruit? How many new activists would you like your local to identify? How many quality contacts/conversations will your local have with potential members? How many leaders will you identify?*

## Campaign Phases and Timeline

*Consider the different phases your local goes through each year: back to school, fall in building recruitment, winter, spring early enrollment, summer break, etc. Plan out the key dates including internal and external events and activities, milestones, kickoff or trigger events. These are all dates that your local deems important and then you build your campaign around this calendar. In this, you should consider who is responsible for each activity and what resources your local might need to be successful. Don't forget to schedule time for debriefs after each phase and then a final debrief at the end of your year-round campaign.*

## Campaign Organization Structure

*Who will be involved in the year-round membership campaign and what will their roles and responsibilities be? Who are the key players? Campaigns involve key decision makers, opponents, and allies. State what role your local leaders will play? How will your Association Representatives be involved? Do you have a membership committee and what will their responsibilities be? What will be the role of the president? What will be the role of the local UniServ staff person? In order to effectively implement your plan, you will need activists and volunteers. Don't forget to include your strategies for recruiting and retaining activists and volunteers.*



## Campaign Strategies and Elements in each Campaign Phase

*Here, outline what strategies you will permit in your campaign. How will you identify and train ARs and recruiters to engage in your member to member campaign? How will you target specific building or sites in your district? What demographic of potential members will you target (e.g. 0-5 year teachers, transportation workers, etc). How will you collect and obtain personal data from both members and potential members? How will you engage members in your campaign? What is your plan to use the data generated from this campaign for future actions? How will you get your message out to all those needing to see it?*

## Strategy to Collect Data

*What will be your strategy to collect data on number of quality contacts, number of new members, number of engagements, number of commitment cards, number of new activists, and other information necessary?*

## Budget

*List out what each action and activity might cost. This can include funds for release time for leaders, production of materials to be used in campaign, or incentive programs for involving others in the campaign. Be creative in what you want to do knowing that there are limited financial resources. Include any budget requests you have from NEA and state association. Also list out what financial commitment your local association has put aside for this campaign.*

## Follow up Plan

*Think about where you want your local association to be when this campaign concludes. What will be your plan to continue to be relevant to both members and potential members then?*





## CHECKLIST: CHOOSE TACTICS THAT FIT

- Does the action relate to your issue?
- Will it increase the pressure on the decision-maker?
- Is it simple?
- Is it visible?
- Is it timed for effect?
- Is it new and different—or tried and true?
- Are enough people ready to do it?
- How will others react?
- Will it unify people?
- How will management react?
- Could it backfire?
- Does it violate the law or the contract?
- If so, are you prepared for the consequences?
- Will it be fun?





## EXERCISE: ARRANGE THESE TACTICS ON A THERMOMETER

Here's an assortment of tactics that workers have used and loved. Pick an issue in your workplace and imagine you're planning an escalating campaign. Use the blank thermometer (next page), and write in the tactics you might use, beginning at the bottom with the mildest ones.

Which tactics are "hotter" might vary from one workplace to another, and some tactics will be unique to a particular workplace. Can you think of actions you might try that aren't on this list? Place these on your thermometer, too.

- Bombard the boss with phone calls and emails
- Put up posters
- Wear T-shirts or hats with a slogan or cartoon on a particular day
- Visit the boss in a small group
- Strike
- Wear buttons or stickers
- Distribute leaflets
- File a group grievance with signatures
- Hold an informational picket line
- Rally in the parking lot and enter the building at the same time
- Circulate a petition
- Set up a Facebook page for your campaign
- Write and sing a song about the boss
- Barrage management with tweets and Facebook comments
- Invite a giant inflatable rat to sit outside the workplace
- Do a survey
- Meet with outside supporters; get them to take action, too
- Visit the boss in a large group
- All take breaks at the same time
- Spill the beans to the media
- Call the boss out in front of other workers
- Everyone gets "sick" on the same day
- Work to rule
- Make up wallet cards that define workers' rights
- Do a skit or other creative action at a picket line, shareholders' meeting, or public place
- Rally at district headquarters or another target
- Stop working overtime, all together





# Field Experience Organizing Toolkit

## Context/Overview

This toolkit is a resource to use when conducting a field organizing experience. A field organizing experience brings staff, leaders, and members together for relational, issue-based organizing. .

We recommend the following goals for field organizing experiences:

1. Identify issues and concerns at the work site level
2. Membership recruitment, retention, and engagement
3. Leadership team building at worksite level through identification of "natural" leaders
4. Identification of activists or mobilization of members
5. Identification and development of members organizing and leadership skills and abilities

## Example Timeline

### Months Prior to the Field Organizing Experience

**Make a plan** - Begin making your organizing plan and set both qualitative and quantitative goals for this effort. Field Organizing Experiences are most effective when executed in the context of a current organizing campaign. A detailed plan includes: compelling issue(s), goals, timeline, budget, training, benchmarks, and an implementation team.

### 6 – 8 weeks prior to the experience

**Secure data/lists** - At this point you'll also want to start thinking about ways to secure data and lists about your members or potential members. Some locals are able to work with the district to request full staffing lists, others have to work to pull staff lists from individual school websites. In general the more information there is on a given list the better. Information such as phone number, email, zip code, and address are ideal. However, information such as first name, last name, middle initial/name, and worksite can also be helpful. The higher the quality of the data the more useful it'll be during the experience. If you have questions about data, contact your state affiliate.

### 4 weeks prior to the experience

**Build your team** – A successful field experience requires a team of people working together with clear roles and responsibilities. Work with your team to figure out things like: who will schedule the visits, who will prepare the materials, who will communicate with leaders/activists, etc.

Prepare members for being released from duties in order to participate. This can include union release time, requesting substitutes, etc. depending on your contractual rights.

### 2 weeks prior to the experience

**Prepare the experience's schedule** – The schedule should outline general dates, times, and locations important to the blitz. It is always necessary to hold an orientation for participants at the beginning of the

field experience. Other important activities to schedule include daily briefings, any training components, and times to report back to your central location for the daily debrief. You should also create space for celebrating and sharing of learnings throughout the time together for the field experience.

**1 week prior to the experience**

**Create your field teams and make assignments** - Create field teams of based on size of list, size of worksite, diversity, strengths of team members, and other local considerations. Print out your lists and assign work sites, phone calls, or home visits for each team. As you assign lists, prioritize lists that are most in need of a organizing work.

**Put together packets for field teams-** Double check that your packets have everything that you need to meet your objectives. Do you have membership forms? An engagement piece such as a petition? Lists? A local flyer about your priorities and successes for the year? Talking points for the field teams about key issues?

**The following Pages Provide Example Materials and Resources**

## Example: 1 on 1 Conversation Notes Sheet

Person's Name: \_\_\_\_\_

Work Site: \_\_\_\_\_

Position/Grade Level: \_\_\_\_\_

Person's Home Email: \_\_\_\_\_

### 1. Get to know them: Abilities, Skills or Talents:

|  |
|--|
|  |
|--|

### 2. Finding their issue(s): If you could change one thing about the district/your classroom what would it be? How does that affect you? Your family? Your students? How does that make you feel? Have you tried changing it?

|  |
|--|
|  |
|--|

### 3. Finding solutions to issues and challenges. What is the member willing to do?

|  |
|--|
|  |
|--|

### 4. Leader ID: Who are some other trusted and respected colleagues that would be good to talk to? Why?

|  |
|--|
|  |
|--|

### 5. Other information we should know:

|  |
|--|
|  |
|--|

### Conversation assessment:

1 – Supportive Member Leader w/ Followers

2 – Supportive Member

3 – Persuadable Non-Member

4 – Unsupportive Non-Member

Your Name: \_\_\_\_\_

Date: \_\_\_\_\_

## MEMBER CONVERSATION TRACKING SHEET

(FILL OUT IMMEDIATELY AFTER CONVERSATION)

Member/Potential Member Name: \_\_\_\_\_ Position/Subject: \_\_\_\_\_

Work site: \_\_\_\_\_ Years at this school: \_\_\_\_\_ Years In district: \_\_\_\_\_

---

Top 3 issues:

- 1.
- 2.
- 3.

Who would you say are some of the most trusted and respected staff at your work site? Who do you go to for guidance? Why?

(Aim for 2-4):

- 1.
- 2.
- 3.
- 4.

Any additional notes (optional):

Follow-up Needed:

Organizer Name: \_\_\_\_\_ Date: \_\_\_\_\_

# Site Visit Report Form

Work Site: \_\_\_\_\_

Date: \_\_\_\_\_

Visit Time: \_\_\_\_\_

Building Rep(s): \_\_\_\_\_

Ease of access and receptivity at this site: (choose one):

☐ Very welcoming    ☐ somewhat welcoming    ☐ Difficult

|                                         | # of Certified | # of Classified | Total |
|-----------------------------------------|----------------|-----------------|-------|
| Quality Contacts - Members              |                |                 |       |
| Quality Contacts - Potential Members    |                |                 |       |
| Membership Forms Completed              |                |                 |       |
| Commitment Cards (Or additional action) |                |                 |       |

Potential Leaders Identified:

| Name | Assessment | Notes |
|------|------------|-------|
|      |            |       |
|      |            |       |
|      |            |       |
|      |            |       |

Potential Members for Follow-up:

| Name | Job (grade, department or classification) | Notes |
|------|-------------------------------------------|-------|
|      |                                           |       |
|      |                                           |       |
|      |                                           |       |
|      |                                           |       |

Submitted by: \_\_\_\_\_

Please put additional notes from visit on back of work sheet.



Home Visit Daily Report Form

Field Experience Team: \_\_\_\_\_ Turf: \_\_\_\_\_

Please tally these numbers:

|                |           |                                              |
|----------------|-----------|----------------------------------------------|
| Homes Visited: | Contacts: | Assessments:<br>1's-<br>2's-<br>3's-<br>4's- |
|----------------|-----------|----------------------------------------------|

What quality contacts did you make?

| Name | Local, School, Position | Assessment | Notes (included action taken) |
|------|-------------------------|------------|-------------------------------|
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |

What else should we know from your visits?

## Sample Member Commitment Card

*THIS SCHOOL YEAR, I PLEDGE TO SUPPORT*  
**GREAT PUBLIC SCHOOLS BY:**

- |                                                                                  |                                                                                                              |
|----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Serving as an Association Representative at my worksite | <input type="checkbox"/> Engaging in a community service event                                               |
| <input type="checkbox"/> Attending a school board meeting                        | <input type="checkbox"/> Registering to become an Education Cyber-Lobbyist on state and national legislation |
| <input type="checkbox"/> Helping coordinate a professional development activity  | <input type="checkbox"/> Joining an Association Committee                                                    |
| <input type="checkbox"/> Participating in outreach efforts by contacting members | <input type="checkbox"/> Assisting with planning events                                                      |
| <input type="checkbox"/> Belonging to my professional Association                | <input type="checkbox"/> Other: _____                                                                        |
|                                                                                  | _____                                                                                                        |
|                                                                                  | _____                                                                                                        |

NAME:

SCHOOL/WORKSITE:

HOME ADDRESS:

CITY/STATE/ZIP:

HOME PHONE:

CELL PHONE:

PERSONAL EMAIL:

## Sample Field Experience Schedule

| Sunday, 7/26                                                                                                                                                                                                                            | Monday, 7/27                                                                                                                                                                                                                                   | Tuesday, 7/28                                                                                                                                                                                                                                  | Wednesday, 7/29                                                                                                                                                                                                                                                                           | Thursday, 7/30                                                                                                                                                                                                                                 | Friday, 7/31                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <p>1PM – Participants arrive. Training begins: Campaign briefing, review week's schedule review, and conversation role-plays, etc.)</p> <p>6PM – Training concludes. Teams given assignments for tomorrow</p> <p>7PM – Group dinner</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> <p>(Depart Thursday night if possible)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Final Debrief</p> <p>2PM – Group Photo</p> <p>(Depart Friday afternoon)</p> |

# Checklist and Questions for a Successful Field Experience

## Checklist:

- \_\_\_ The Local Association is on board
- \_\_\_ The State Association is on board, if applicable
- \_\_\_ The dates are confirmed with all stakeholders
- \_\_\_ There is a team of individuals from the local responsible for the overall success of the field experience
- \_\_\_ The experience will help launch or build on an organizing campaign
- \_\_\_ The local's organizing campaign has a compelling issue and message
- \_\_\_ Local staff, leadership, and membership will participate in the experience
- \_\_\_ There is a training plan for teams on organizing conversations, key local issues and collecting data
- \_\_\_ The experience will further identify and develop the local association's worksite leadership
- \_\_\_ We've secured the lists and data needed for members and potential members
- \_\_\_ That data has been uploaded into the VAN or other data tracking tool when and where needed
- \_\_\_ We've secured access to worksites at appropriate dates and times, if applicable
- \_\_\_ We have discussed and secured agreement to include home visits or phone calls, if applicable
- \_\_\_ We have a means to keep track of key metrics (conversations, issues, members engaged, members recruited, leaders identified, etc) per visit so they can be reported daily and entered back into the VAN or other data tracking tool

- \_\_\_ We have created a “to do” list for the experience: for example, gather school or worksite rosters and schedules, building maps, schedules for staff and room assignments; arrange for substitutes, pair teams, and print worksite rosters including list of association reps at each worksite and template for reporting conversations
- \_\_\_ We have determined transportation to worksites and reimbursement for use of personal vehicles
- \_\_\_ We’ve developed a follow up plan at the local level that ensures that the effort of this experience will translate into long-term power building for the local affiliate

**Questions to consider:**

**Participants**

Who will be participating in this experience from the local and state affiliate, if applicable?

Will local leadership participate in teams going out into the field or making phone calls?

Does the local have current activists and/or work site leaders that will be part of the experience?

How many members, UniServ staff and leaders will be needed?

Who is prepping the materials (i.e. conversation note sheets, worksite visit debrief sheets, snacks, flyers, etc.)? Who is training teams?

What specific skills will participants gain or further develop in this field experience?

**Data**

What is the data capacity of the local? Do they regularly use the VAN or other data tracking tools?

Who will prepare the lists/data for phone calls, home visits or worksite? Who will enter the daily data from the experience into the VAN or other data tracking programs?

What training/support on data collection and reporting does the local need prior to the experience?

### **Follow Up**

What critical information and data will be collected in order to execute a follow-up campaign (i.e. tracking potential leaders, engaging new members, key issues, etc.)?

How will the local assess the data? How will the follow up plan be implemented? Who will be responsible

## MIDWEST ACADEMY STRATEGY CHART

| Goals                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Organizational Considerations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Constituents, Allies/Opponents                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Targets                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Tactics                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. List the long-term objectives of your campaign.</p> <p>2. State the intermediate goals for the issue campaign. What constitutes a victory? How long will the campaign:</p> <ul style="list-style-type: none"> <li>• Win concrete improvements in people's lives?</li> <li>• Give people a sense of their own power?</li> <li>• Alter the relations of power?</li> </ul> <p>3. What short-term or partial victories can you win as steps toward your long-term goal?</p> | <p>1. List the resources that your organization brings to the campaign. Include: money, number of staff, facilities, reputation, etc.</p> <ul style="list-style-type: none"> <li>• What is the budget, including in-kind contributions, for this campaign?</li> </ul> <p>2. List the specific ways in which you want your organization to be strengthened by this campaign, Fill in the numbers for each:</p> <ul style="list-style-type: none"> <li>• Expand leadership groups.</li> <li>• Increase experience of existing leadership.</li> <li>• Build a membership base.</li> <li>• Expand into new constituencies.</li> <li>• Raise more money.</li> </ul> <p>3. List internal problems that have to be considered if the campaign is to succeed.</p> | <p>1. Who cares about the issues enough to join in or help the organization?</p> <ul style="list-style-type: none"> <li>• Whose problem is it?</li> <li>• What do they gain if they win?</li> <li>• What risks are they taking?</li> <li>• What power do they have over the target?</li> <li>• Into what group are they organized?</li> </ul> <p>2. Who are your opponents?</p> <ul style="list-style-type: none"> <li>• What will your victory cost them?</li> <li>• What will they do/spend to oppose you?</li> <li>• How strong are they?</li> </ul> | <p>1. Primary targets</p> <p>A primary target is always a person. It is never an institution or elected body.</p> <ul style="list-style-type: none"> <li>• Who has the power to give you what you want?</li> <li>• What power do you have over them?</li> </ul> <p>2. Secondary targets</p> <ul style="list-style-type: none"> <li>• Who has the power over the people with the power to give you what you want?</li> <li>• What power do you have over them?</li> </ul> | <p>1. For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p>Tactics must be:</p> <ul style="list-style-type: none"> <li>• In context.</li> <li>• Flexible and creative.</li> <li>• Directed at a specific target.</li> <li>• Make sense to the membership.</li> <li>• Be backed up by a specific form of power.</li> </ul> <p>Tactics include:</p> <ul style="list-style-type: none"> <li>• Media events.</li> <li>• Actions for information and demands.</li> <li>• Public hearings.</li> <li>• Strikes.</li> <li>• Voter registration and voter education.</li> <li>• Lawsuits.</li> <li>• Accountability sessions.</li> <li>• Elections.</li> <li>• Negotiations.</li> </ul> |

## **Daily Debrief of Site or Home Visits or Phone Calls**

### **Example: Debrief Questions**

1. What went well? What didn't? Why?
2. What constraints or barriers did you face?  
How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the work site?
7. How can we do better in the future?



# Wisconsin Education Association Council Tactics Manual

## **Wisconsin Education Association Council Tactics Manual**

### **Introduction**

This handbook was developed to assist locals that find themselves in crisis situations. The activities provide step-by-step directions for implementation. Some activities may be done as a single one-time event, while others are long-range or may be done as part of a series of events (depending on the nature and severity of the crisis situation). It is hoped that the user of this guide will view it as a cookbook and thus will carefully choose the recipe to be used and flavor it to individual unit tastes. Keep in mind as well that whatever tactics are employed, they must be part of an overall strategy to influence and to put pressure on the appropriate decision maker.

When determining what activities you will incorporate in your campaign, it is useful to utilize the public's support of public schools to your advantage. Using the message "Every kid deserves a Great School" is an excellent way to elicit public support. To obtain training regarding dealing with the media, please contact WEAC Public Relations & Communication.

When organizing for purposes of getting a contract, one of the most important goals is to establish communication lines to the membership. An uninformed membership is a dead membership in terms of organizing. Without having the backing and the understanding of your membership, any positive goals will be soon snuffed out due to lack of interest.

The Association's capability of organizing a successful rally, picket, boycott, educational workshop for its members or any other action or activity depends upon the Association's participation and power in the political arena. Please keep this in mind as you read and utilize this handbook.

### **Building Momentum**

It is necessary to broaden membership involvement and commitment to provide the level of solidarity needed for success. Members should not be expected to give blind support to something they do not understand. The leadership must convince the members that the cause is worthwhile and that failure to act is an abdication of professional responsibility. It is difficult to build strong support only from an awareness of the issues. Polarize the issues so that members are able to see that the crisis at hand is the result of "bad faith" on the part of decision makers.

It is important that the leadership maintain control of the situation. As the escalation process continues, it is imperative that steps be taken to ensure the membership has complete confidence in the leadership.

## Guidelines to Escalation

The whole escalation process must be implemented with regard to the available timeframe. Start on a low key and orchestrate the plan in a step-by-step manner to ensure the greatest impact. Move from the simple to more dramatic. Be aware of the comfort level of the members and avoid engaging them in activities for which they are not yet prepared. Consider using three different phases, with Phase I being the least confrontational and with Phase III being the most difficult. The following are examples of low-key escalation:

1. Give an early indication to the board or their representatives that the members are not pleased with the current situation.
2. Imply that if some movement is not forthcoming, it will be necessary for further consultation with the membership. Also indicate the representative assembly has voiced its concern over a lack of progress toward a positive result.
3. Make it known that there is continued communication from the leadership to the general membership. Indicate that they have been informed of potential problem areas. (Make sure they have been.)

As positions become entrenched, communication should become more specific and more personal (i.e., executive board meets with negotiating team to fully explain the issues). The Executive board then may release a statement to the general membership. Indicate in the release that if positive movement is not made within a specified period of time, further action will be called for.

By this time, the Association should be issuing flyers, newsletters and special bulletins indicating issues, concerns, and problems. Begin to expose attitude of the decision-makers and the lack of respect they are showing toward the members.

Hold building meetings to report the current status of the situation.

A key component to any successful campaign is to gain membership support for actions. Performing tactics without having a clear goal in mind is of little value.

The tactics in this volume have been arranged in the following manner:

1. Media Relations
2. Community
3. Worksite Activities
4. School Board/Administration
5. Parents

Each tactic includes a brief description, a section on preparation, methods for implementing, and considerations to take into account when implementing the tactic.

Remember, there is no one way to organize. What might work best at one worksite may not be successful at another. Giving members choices in the way they organize will help move the process along and provide a better chance of success.

For further assistance in the development of strategies and tactics, please contact the WEAC Collective Bargaining and Research Campus at (800)362-8034.

The compilers of this volume would like to express their appreciation to the following for their contributions to the materials within: Pat Connolly, John Matthews, Joyce Bos, Marv Shipley, Bob West, John Carl Davis, Gene Degner and the Florida Education Association.

Mark Simons  
Mike McNett

**Category:**                    **Membership**

**Tactic:**                    **Attend Bargaining Sessions w/ Candle Vigil**

**Description:** Depending on what stage you are in negotiations, this is something that may be useful to bring members out en masse to a negotiations session, provided it is done on non-work time.

**Preparation:**

- Purchase a large number of small candles to be used at the vigil
- Announce to the membership when they should arrive prior to the bargaining session and how long they should plan to stay. Plan to have members present prior to the start of negotiations so that the board's team will witness this prior to bargaining.
- Decide if you want this to be a media event or not, and contact the appropriate organizations.

**Considerations:**

- You may want to consider having your members attend a meeting without candles, depending on what is taking place at the table. This can serve as a strong show of force, and can be used to get information out very quickly as to the board's response to an issue.

**Category:**                   **Membership**

**Tactic:**                   **Rally for the Bargaining Team Prior to Negotiations**

**Description:** This is an event that you can use to fire up your bargaining team, and show support for them in negotiations. This can be done similar to a candlelight vigil for negotiations.

**Preparation:**

- Decide how long the rally will last, and where it will be held
- Consider holding the rally close to the location for bargaining as a show of solidarity to the board and support for the team.
- Provide refreshments, invite members to bring family to this event.
- Have access to restrooms, which may otherwise be locked outside of school hours.
- Plan the length of the event so that it is adequate to communicate the message, but not so long as to become a burden to the Association's bargaining team.

**Methods:**

- Have the chief negotiator or a member of the bargaining team address the members, thank them for their support, and articulate to them why their involvement is necessary for success.
- Consider having a local band or other entertainment.
- Members may be asked to wear buttons, or other items showing solidarity.
- Members arriving early may fill the parking lot, requiring board members to park at a distance and walk to the meeting.
- Members may line the halls and cheer the bargaining team as they make their entrance. Signs, pennants, pom poms, and noisemakers are worthy of consideration. Cold silence and looks of disdain may be appropriate as board members enter.
- Have a tailgate party in the parking lot before and during the bargaining session.

**Considerations:**

- Consider noise restrictions, if any.
- Depending on the space being used, a permit or advance notice of Facility use may be in order. If the event is on district property, review applicable portions of the contract.

**Category:**                    **Membership**

**Tactic:**                    **Button Wearing**

**Description:** Members wear buttons to show solidarity and to express their viewpoint.

**Preparation:**

- Begin by brainstorming with the team or action committee regarding slogans and graphics to be used. Linkage to themes used by speakers and used in other materials distributed by the local may be useful.
- Determine and announce to members whether to wear the buttons always or on specific predetermined dates or days of the week.
- Buttons can be made by a small team of volunteers if a button press is available. Many schools and some UniServ offices have a press. Alternatively, buttons can often be ordered from vendors. Sources and catalogs may be available through athletic directors, cheerleader advisors, and others in the school setting.
- An alternative to buttons is self adhesive stickers. They can be worn only once, but do not puncture clothing, cost less, and the message can be changed for subsequent printings.

**Methods:**

- Be sure to have extra buttons in the buildings for those members that forget to wear them.
- Some locals may want to track member involvement by tracking how many members at each worksite wore the buttons.
- Find out from those that refused to wear a button, why they decided not to participate so that the local can better address their concerns.
- Button messages should be changed at intervals to keep up interest. This can be coordinated with developing themes as the situation escalates.

**Considerations:**

- Members may be told by administration that they must take off the buttons because they are “distracting,” or for other reasons. Such incidents should be reported to the building representative as soon as possible. Members do not shed their constitutional rights at the school house door, but there is a balance in case law between the right of the employee and the employer’s need to conduct business. Please contact UniServ staff or the Office of the General Counsel to discuss specific situations.
- Members generally have the right to answer questions from students and others, but should not use class time to initiate or prolong discussions on the topics of bargaining or buttons.
- Should the local decide to acquiesce to district demands to stop wearing buttons at work, an alternative may be to put the buttons on book bags, coats and hats, and other objects which are brought to the worksite but not worn during the workday.

**Category:** **Membership**

**Tactic:** **Wear Same Color Clothes To Work**

**Description:** All members in the unit wear the same color clothes to work on a designated day.

**Preparation:**

- Decide what color clothing to wear, and on which day(s). It is good to develop a regular schedule, such as a specific day of the week, pay days, game days, etc., or tie the activity to events such as staff meetings, open house, parent conferences, or bargaining sessions. Whatever the schedule, link the members' wearing of the color to the local's message.
- Send out a reminder the day before to encourage members to wear the color.
- The local may determine to produce shirts or other apparel in the chosen color. Such items may be sold or given to members, depending on budgetary considerations. The garment should be of sufficient quality to be worn to work over a period of time, and should have a logo or slogan that promotes the pride and unity of the members.
- For those that forget to wear the designated color, have handy small ribbons of the color that they can wear to show their solidarity.

**Methods:**

**Considerations:**

- Have ribbons available for members as well.



**Category:**                    **Membership**

**Tactic:**                    **Arm Bands**

**Description:** This can be done in the same manner as button wearing, but for much less cost.

**Preparation:**

- Determine when you would like members to wear armbands and select a color.
- Arm bands can be created in each building from rolls of ribbon and safety pins or tape. For a more permanent armband, consider better cloth with Velcro or elastic.

**Methods:**

- Have extra arm bands in the buildings, for those members that forget to wear them on the day they are asked to.
- Get a report of how many members wore the bands and report this information to the action committee.
- Find out from those that refused to wear arm bands, why they decided not to participate.
- Once you have members committed to wearing them, you can increase the number of days that they are asked to wear them.

**Considerations:**

- Members may be told by administration that they must take off the arm bands because they are distracting to the learning environment. Any incident such as this should be reported to the building representative as soon as possible. As with button wearing, the balance of employee and employer rights may be complex, and the local should consult with UniServ staff and possibly the Office of the General Counsel.

**Category:** School Board & Administration

**Tactic:** Letter Writing Campaign

**Description:** Members write letters to a designated recipient who has been identified by the Association as a key decision maker. This may be a school board member or the superintendent, for example.

**Preparation:**

- Establish a template that the members can use as a sample on which to base their letters.
- Content should focus on issues of respect and school quality. Letters should not become an attempt to directly bargain specific issues through the mail. Letters should be clear about what the writer wants the decision maker to do.
- Remind members not to be hostile, but to explain the current situation from their own perspective.
- It can be very effective to give a personal example of how the issue impacts the writer of the letter.

**Methods:**

- The local may decide to have members send e-mail instead of snail mail. Ask members to cc: their e-mail or letters to an Association officer so participation and message can be monitored.
- Determine the pacing of letter writing. There are a variety of possible options:
  - Random flow of letters over an extended period of time
  - Windfall – one voluminous delivery
  - Stagger – assign groups at varied time intervals
  - Immediately – telegrams, over night mail, FAX, e-mail, phone call, etc.
- Conduct a letter writing meeting at the work site or at a leadership meeting, in order to ensure that the work is done.
- Provide a fact sheet to anyone who wishes to write a letter, this will assist them with staying on message.
- Consider having a table set up at Association events to encourage members to write.
- Encourage parents and other supporters to join in the letter writing effort.
- The Association's spokesperson may decide to read selected letters at a school board meeting or other public event (with the writer's permission).

**Considerations:**

- Be sure that your intended target is someone who can impact the decision that you are trying to change. It is ineffective to target a principal, for

example, if that person has no impact on the district's decisions at the bargaining table.

- Individualized communication is more effective than more general messages. In terms of effectiveness, from greatest to least: personalized hand written, hand written post cards, hand written form/common script language, e-mail, typed form letters/postcards, petitions.
- Avoid making unfounded personal attacks. The potential of being successfully sued for libel is very small, however, regarding statements made in a personal letter to an elected public official.
- Do not make or imply any personal threats against the recipient of the letter, their health, their property, or their family.

**Category:**                    **Membership**

**Tactic:**                    **Phone Banks**

**Description:** When it is necessary to contact a large number of people, or to turn out a large number of members to an event, considering using a phone bank.

**Preparation:**

- Compile or obtain lists of individuals to be called.
- Select a phone bank site that has a sufficient number of phone lines available. Sometimes UniServ offices, banks or other office buildings will let a local use their phones after business hours.
- Develop a phone script that is short but gets to the message you are trying to convey. Be concise and ask for a response.
- Recruit volunteers to make calls, and assign them to shifts no greater than two hours in length. It may be necessary to run multiple shifts.
- Provide a tracking form for callers to use. Include any information that the callers will need, and any information that you may need to obtain through the calls, such as a commitment to participate in an event, verification of their current home e-mail address, etc.

**Methods:**

- Make calls when individuals are most likely to be available. 5:00 to 9:00 p.m. is a likely time range.
- Provide refreshments for the callers and thank them for their contribution of time.

**Considerations:**

- Most people do not like to get what they perceive as telemarketing phone calls, so be sure to keep your message short, and ask the individual for a commitment. The longer the script, the less likely they are to be supportive.
- Some organizations use an automatic dialer for phone calls. A large number of people can be quickly reached with a message, but this method does not allow you to ask them for a direct and immediate response. Autodial services can be expensive, and may limit the length of your script to thirty seconds. This method is good for quick reminders or to refer people to a website or other information source.
- Establish a hotline or website at which members or community people can get further information.

**Category:**                    **Membership**

**Tactic:**                    **Work Site Meetings**

**Description:** By holding work site meetings, leaders will be able to address member concerns directly and can stay in touch with the thinking and climate in various buildings.

**Preparation:**

- Hold work site meetings at times that are most convenient to the members at that location. To have best attendance, take into account start and end times, meetings and after school activities that involve staff, shared break or lunch times and other factors that impact member schedules.
- The goals of a work site meeting are to inform, answer questions, receive input, clarify issues or positions, determine level of support, or ask the membership to participate in an activity.
- Tailor your discussion to your anticipated audience. Each worksite has a different personality, needs and level of commitment to the Association.
- Select a place to meet. In most cases, this will be on site. In some instances, members may be more comfortable at a local restaurant, bar, or someone's home.
- Establish and print an agenda ahead of time. If the agenda is long, it may be better to schedule a series of short meetings rather than to keep a group of tired people for too long a time.
- Notify members at the work site at least one week in advance whenever possible. Consider having the meeting's speaker (union leader, bargaining team member, or staff) mentioned in the announcement for the meeting to gain interest.
- Remind audience one day before with a flyer and possibly a copy of the agenda.
- Consider holding questions until the end of the presentation, if necessary, to keep the meeting on time,.
- Have handouts and materials ready the day before.
- Advertise start and end time, and stick to it.

**Methods:**

- Serve refreshments.
- Keep the meeting brief. Consider holding questions until the end of the presentation, if necessary, to keep the meeting on time.

**Considerations:**

- Establish a series of monthly or bi-weekly meetings during negotiations.
- Review contract language regarding use of district facilities for meetings.
- Be aware that any printed or spoken information given to broad groups of members will quickly find its way to the administration.

**Tactic:**                    **Boycott**

**Category:**              **School Board & Administration/Community**

**Description:** A boycott is an organized means of nonsupport of products, goods, services and/or businesses. The association can use boycotts to exert pressure on businesses that have damaged employees and/or association.

**Preparation:**

- Determine whether a boycott is feasible and whether one can be staged that will put pressure on a key decision maker. This assessment may include an estimate of the share of revenue members and supporters bring to the selected business.
- Gain commitments from allies and supporters to participate in the boycott.

**Methods:**

- Inform members of the boycott and gain their commitment to participate.
- Ask allies, parents and other unions to participate.
- Distribute leaflets to the public in front of the boycotted business.
- Organize picketing in front of the business.
- Announce the boycott to the press to educate community as to why the boycott is necessary and to enlist their support and participation.

**Considerations:**

- Boycotts should be used in situations in which the local will be able to exert an effective economic impact on a business.
- Boycotts in general can be very difficult and time consuming, consider why you are proposing it, and how it will be effective. Be sure to have a timeline established which spells out what your goals are.
- In considering a boycott, always remember who your target is. For example, if you have an uncooperative school board member who owns a local business, consider targeting that person's business for a boycott.
- Look as well at secondary targets that might be able to put pressure on your intended target. This may be, for example, a grocery store that does business with your primary target. Be sure to publicize why you are boycotting a product or business.

**Category:**                    **School Board & Administration/Community**

**Tactic:**                    **Pack Up Personal Equipment**

**Description:** Members pack up all the personally owned equipment, supplies and materials that are present for use at the worksite. This is an event that can be used to illustrate the amount of items that teachers or support personnel use on an every day basis that is their own products and not provided by the school district.

**Preparation:**

- Inform membership that a certain day they should pack up any and all personal equipment that they use and be prepared to take this equipment home.
- Be sure to provide boxes so each member can pack items that belong to them.
- Make an inventory of what items members are removing from their worksite that belong to them.
- By having members create an inventory, this will provide more information to the media and administration what isn't provided to our members.
- Do not allow for members to be seen leaving by themselves. A large group of members packing up and walking out all at once is very effective.

**Methods:**

- Have each member take their items to a central place all at the same time. If possible, use the front door of the school, so that it can be shown all at once.
- This is a good media event; and it will show how many items members have to use every day in order to provide a quality learning environment .
- This shows items that are not provided by the district due to lack of funds.

**Considerations:**

- When deciding to do this, be aware that the removal of necessary items from a member's room will affect the member directly to do their job effectively.
- Many members will resist taking out critical items that are not provided by the school, and will impact the learning environment of their children.
- The need to publicize what items the members use that they purchased is also an effective way to get the message out prior to having them remove these items.
- Publicize the fact that these items are not provided by the district prior to having them remove them. This will put the district/media on notice as to what items will be removed at a certain time.

**Category:**                    **Membership**

**Tactic:**                    **Leave & Arrive at Same Time**

**Description:** Have members meet in a central location before or after school, or both and walk in or out of the building together. This should be done at the time when it is the contract start or end time.

**Preparation:**

- Designate an area where members know and feel comfortable meeting. This should be an area that is highly visible to the administration/general public.
- Having members enter and leave at the contract time can be a powerful showing of solidarity.
- This can be done in stages. For example, you could have members meet on Wednesdays to walk in or out together.
- Be sure that the media is aware of this action in order to get coverage.

**Methods:**

- If possible, have a member announce over the school PA when it is time to leave. This could be done like, “It is now 3:45. Thank you.”

**Considerations:**

- Some members will be resistant to this idea since they usually will get to school early for prep or stay late to assist students or for voluntary activities.
- Be sure prior to deciding to do this that you have the support of your membership to follow through. Be sure you survey to get an accurate read on what their comfort level is.
- This is another form of working to the contract that can be divided up to utilize in a way that is effective.



**Category:**                   **Membership**

**Tactic:**                   **Resign From Voluntary Activity**

**Description:** This activity is another work to rule that is also effective. Members resign from voluntary activity by writing out what it is that they volunteer to do, that they will no longer participate in.

**Preparation:**

- Have members write down all of the voluntary activity that they do for their school or students.
- Once this list is prepared, be sure it does not include activities that are paid extra-curricular or activities that are required to be performed under the contract.
- Voluntary duty could include for example, playground duty or detention duty that employees volunteer for, but are paid. The alternative may be to have employees assigned on a rotating basis, depending on their contract.
- Consider taking out an ad in the local paper illustrating all of the activities that are done on a voluntary basis by your members.

**Methods:**

- Resignation may be done at one time or en masse, with employees dropping their resignations off at the principal or superintendent's office. Potentially a good media spot, if done en masse.

**Considerations:**

- Some members may not be comfortable losing the extra pay that they receive for some activities, so be aware that all members may not resign from work.
- Be sure to review contract for other potential volunteer activities that may be targeted, for example, a school function where attendance isn't required, but is expected would be a good function to cease.
- A careful review of contract language and prior grievance history is necessary to determine options on voluntary activities.

**Category:**                    **Membership**

**Tactic:**                    **No Representative at Administration/Student Faculty Meetings**

**Description:** This is another activity that can fit under working to contract, for those committees that are advisory and are not mandatory; this is another voluntary activity to resign from.

**Preparation:**

- This requires the person who was appointed or volunteered for this committee to make a formal and public resignation of being on the committee. This can be effective especially when the committee is one that is working towards goals that the administration is pushing.

**Considerations:**

- This again is another activity that must be clearly voluntary, and not mandatory. A careful review of your contract prior to resignation is necessary so there isn't a contract violation.
- Refer to "Resignation from Voluntary Activities" for more detail.

**Category:**                    **Membership**

**Tactic:**                    **Cancel Student v. Faculty Game**

**Description:**    Some schools sponsor a student v. faculty baseball, volleyball or basketball game. Canceling this game is another activity that can be covered under working to contract.

**Preparation:**

- In considering this activity, this is one that can be a good or bad media event, depending on how it is handled.
- This can be cancelled before preparation for the event is done so as to not create necessary work.
- This can also be a situation where all of the members that are scheduled to play, show up at the game, and then walk away. However, depending on how this is fashioned, this can be a public relations nightmare, so be cautious with this kind of public display.
- Be sure you have the full support of those members who were going to play in the game, that they are comfortable with not playing. Should you have lukewarm support, do not attempt this activity.

**Considerations:**

- This is an activity that requires attention to detail, and can be very successful at showing the activities that are performed by the members on a voluntary basis. However, without proper planning, this may be seen in a negative light within the community and by parents, so be sure you have planned and are prepared to follow through.

**Category:**                    **Membership**

**Tactic:**                    **Work to Rule/Contract**

**Description:** This is an extreme job action. It calls for a concerted effort on the part of employees, a well-developed plan of action from the association and a well-educated corps of building representatives. The association must be thoroughly familiar with contractual and job requirements. Under Work to Rule, employee's work to the letter of the contract, fulfill job requirements and no more.

Consider and plan these activities as a series of events; phase in rather than initiate multiple events. This may be done in conjunction with other planned activities.

**Preparation:**

- A careful review of the contract as well as grievance history is necessary prior to starting any kind of work to rule activity. You must be fully aware of what activities are voluntary, and which ones are not. Without this review you may put members at risk by asking them to work to rule and violate the contract.
- Next to a strike this is viewed by a lot of members as the most extreme activity they can undertake. Consider using portions of this as the last phase of a coordinated campaign for the membership.

**Considerations:**

- Once a review of contract and grievance history has been completed, considering writing down all of the activities that members perform that are outside of the contract, then survey members as to what activities they are comfortable not performing as part of this campaign. Taken in smaller steps will provide members more comfort than taking one giant leap on several different activities.

**Note:** Not effective over a long period of time as members lose focus and interest.

**Category:** Community

**Tactic:** Door-to-Door Leaflets

**Description:** A flyer should be made up that illustrates the position of the bargaining unit to the general public. This should be done so that you have an issue that the public will support. This flyer can be for information or this can be asking the public to do something specific.

**Preparation:**

- Find out if any local ordinance prohibits distribution of leaflets. **IT IS AGAINST THE LAW TO PUT ANYTHING BUT MAIL IN THE MAIL BOXES AT PEOPLE'S HOMES.**
- Find out if your members are committed to the task, by informing them of the purpose of the leaflet and ask them for a specific amount of time to assist, usually one or two hours.
- Set a specific date and time for the project. If everyone is working in the district at the same time, it creates a sense of unity among the members. An open house or party can be planned at the end of the task.
- Get a large street map from your municipal government. A land-use map is helpful because it shows number of households in a building, e.g., apartment, duplexes, etc. A local directory that lists addresses by blocks is also helpful.
- Divide city into areas where each member will have an equal amount of leaflets to be distributed. Keep in mind rural v. urban areas when dividing up areas. Usually, have each area given to two members so they will not feel alone when distributing leaflets.
- Dividing the district into areas is a time consuming task, but once the work is done, the system can be implemented on a very short notice.
- You may want to check around to see if someone else in your community has already done this task, e.g., political candidates. We have found that our system is better than any we have seen. We have loaned it to select groups or candidates.
- Ask members to sign up with a partner. If they have a preference for a certain area, they may indicate that when they sign up.
- After the committee has made assignments, a notice is sent confirming the time, date, etc. It is made very clear that they are expected to show up or a colleague will have to do double duty and pick up their assignment.

**Methods:**

- Committee should obtain:
  - printed flyers 10% more than number of households
  - rubber bands
  - large plastic bags
  - refreshments
- As each team arrives at the leafleting center, it is given an envelope with instructions, a map marked with the team's assigned area, and a number designating the number of leaflets needed by the team.
- Once a team is finished, have them turn in their envelope to a designated contact the next day back at school, or have them drop off at the leaflet center to drop off the unused leaflets. Refreshments should be provided.
- A follow-up thank you letter is sent to all members who helped to participate.

**Considerations:**

- Be sure to recruit the necessary amount of members to perform the task. There is a potential for a failure if there is too much work to be performed by a few members.

**Category:**                    **Community**

**Tactic:**                    **Leaflet Popular Locations**

**Description:** This activity should be done at locations where there are a lot of members of community that visit. For example, the post office or local K-mart on a Saturday is a good location to leaflet.

**Preparation:**

- Have members prepare to hand out leaflets for a set period of time, for one or two hours
- Be sure volunteers are knowledgeable to answer questions that arise
- Find out what times are the busiest for a particular location

**Methods:**

- Hand out leaflets to those community members who visit a location
- Leaflets should describe the problem to educate public
- If needed, ask community members to do a certain action

**Consideration**

- Be certain that you are on public land when handing out leaflets
- Do not antagonize those that refuse a handbill

**Category:** Community

**Tactic:** Coalition

**Description:** A coalition is a group of allies that creates strength out of diversity. It is made up of dissimilar groups who have discovered common goals and have agreed to band together to achieve them.

**Preparation:**

- Use a coalition to build an action program to accomplish long term goals, or achieve a short term objective.
- Use political campaigns (to elect school board members, legislators, the superintendent), or to recall elected officials.
- Use this in lobbying at various levels of government to promote or prevent the enactment of legislation or an act of an elected body, or as a Public Relations tool.
- To create or aid in a militant action, (demonstrations, picketing, leafleting, rallies, etc.); use as an investigation or factfinding.
- Use the cooperative power of a group of people with common concerns.
- Make sure that mutual benefits will result; the mutual benefits must accrue to the individual groups and individual members of the coalition.
- Fight no battles you cannot win by setting long term and short term goals
- Understand the self-interests of members of the coalition.
- Develop communication and recruitment skills.
- Understand that diversity among the coalition members is strength.
- Learn how to refine and utilize information gained through and from coalition members.
- Develop mutual trust and respect.
- Identify talents and skills and use them.

**Methods:**

- Start with the known, i.e.
- Seek out your present allies for a new commitment
- Look at other groups who are sympathetic and may have some objectives in common with your local
- Select your most effective, articulate and committed leaders and rank an filers to recruit leadership from prospective allies
- Develop an action program, which can be explained and sold to prospective coalition groups
- Show respect for coalition groups by having a representative from your local attend coalition groups' meetings (Be sure the welcome mat is out)
- Develop and coordinate an external (from the coalition) PR system
- Develop and coordinate an internal (to the coalition) PR system



- Don't re-invent the wheel; the coalition should not re-do things that may have already been done by groups within the coalition; this gives the impression that the coalition leaders have not done their homework
- Recognize and respect the dignity of coalition leaders and the rank and file

**Considerations:**

- **Here is a list of possible allies:**
  - Affiliates of the Wisconsin Federation of Teachers
  - AFL-CIO central labor bodies
  - AFL-CIO public sector unions
  - AFL-CIO private sector unions
  - Political Action Committees
  - League of Women Voters
  - The Junior Chamber of Commerce (Jaycees)
  - Lions Club
  - Rotary Club
  - Kiwanis Club
  - Fraternal Organizations
- **The interest groups include:**
  - Minority rights groups
  - Women's groups (NOW, Woman's Political Caucus, etc.)
  - Council of Churches (Ministerial Associations, etc.)
  - Community services (United Way, Family Services, Child Guidance Clinics, etc.)
  - Drug abuse agencies and organizations
  - Taxpayers associations
  - Senior citizens groups (Golden Age, UAW Retired Workers Councils, etc.)
- **The Social Clubs would include:**
  - Elks
  - Knights of Columbus
  - American Legion, VFW, Am Vets, Disabled Veterans, Vietnam
    - Veterans and other veteran's organizations
- **Some of the "power" groups would include:**
  - Bar Association
  - Bankers, Savings and Loans, etc.
  - Chambers of Commerce
  - Farm Bureaus, etc.
  - Environmental groups (Sierra Club, Audubon Society)
  - Historical Societies
  - Home Builders
  - Real Estate
  - Booster Clubs
  - Athletic Groups
  - Police Chiefs, Sheriffs and other law enforcement organizations
  - NAACP and other civil rights groups

- **Other groups might include:**
  - AIDS groups
  - Hospital associations
  - Dental, optometry, pharmaceutical organizations
  - Cancer Society, Heart Association, Red Cross
  - Student and University Groups
  - Neighborhood associations
  - Anti-censorship groups
  - ACLU
  - People for the American Way

**Considerations:**

**Category:** Community

**Tactic:** Speakers' Bureau

**Description:** A speaker's bureau is a means of providing the association, via selected speakers access to the community through varied groups and gatherings.

**Preparation:**

- When deciding whom to have as spokesperson(s), be sure that the person(s) are able to articulate your position effectively. The best are those who can articulate your position from their own personal perspective.
- Develop a file of groups within the community that your speakers would be able to make a speech at. These may be various groups within a potential coalition that you are developing, or they may be groups that are influential in the community.
- The important thing to remember is that you are trying to get your message out to the community the most effective way possible. Consider using many alternatives as possible. Brainstorm groups that might be willing to hear what your members have to say.

**Methods:**

- Be sure to stay on message when speaking to a group. There will be a tendency to change message, but don't change your intent.

**Considerations:**

- Some groups may be hostile to your members, so it is always good to have your speakers be prepared for the worst. Role-play various scenarios whereby your speakers are put to the test, offer them suggestions on how to answer various questions.
- Prepare talking points for all members and remind them to stay on message.

**Category:** Community

**Tactic:** Community Newsletter

**Description:** This is another way to communicate within the community about the situation that your members are faced with. This should be used in conjunction with other efforts to get your message out.

**Preparation:**

- Consider publishing stories that would be of interest for anyone in the community. Do not begin by listing how bad things are, but by building up interest in what is going on at the school level.
- Consider this a forum that you can use to publicize what is going on that is good at your school.
- Publish stories that are human-interest stories of members or students (be sure you have the permission of the parents).
- Consider keeping the newsletter to one page, and publish on a regular basis, bi-weekly for example.

**Methods:**

- Put in smaller notes about what the current crisis is doing to the school, as you start out. After you have continued to publish, you can then add more stories about the plight of the students and the plight of the members. Consider again, the source of whom you are writing to.
- Make sure the newsletter is professional looking.

**Considerations:**

- Be consistent in the format of the newsletter, and talk with local merchants about having the newsletter on their newsstand, or in a location where other community interest items are located.
- This can also be sent home to parents by handing it out to students.

**Category:** Community

**Tactic:** Truth Booths

**Description:** In a public location, for example inside of a shopping center, is another way to get your message out to the community. This consists of inexpensively constructed booths, or of no more than card tables and folding chairs.

**Preparation:**

- You will want to staff your booth with a couple of members at a time. They should be prepared to answer questions that the community may have regarding the situation at hand.
- Have your members be prepared with Q & A booklets, fact sheets, or pamphlets that they can hand out to those that have questions. Have members sign up for one to two hour blocks of time, depending on how long you want them to be visible. They should sign up in pairs, but don't be afraid to only have one person at a time at the booth.
- Check with local officials regarding locations where a truth booth would be acceptable.

**Methods:**

- This is a great opportunity to have members be visible to the community and getting out the message they want delivered, and not the message of the opposition.

**Considerations:**

- When deciding to do a truth booth, it is important that those members that sign up are fully briefed on the issues and feel comfortable talking to members of the community. They should be given some ground rules and have role-played various questions that they might encounter prior to their shift.

**Category:** Community

**Tactic:** Koffee Klatches

**Description:** This is another opportunity to get your word out to the general public by having informal coffee question and answer sessions at the home of a concerned parent or other community member.

**Preparation:**

- Active parents or other community supporters should attempt to hold a klatch at their home. They should invite eight to fifteen neighbors or friends over for an informal get together at their home to discuss the situation at the school.
- This is something that can be done in multiple places at the same time, and you should be prepared to have teams of members who can go out into the community and meet with concerned parents or other community members.
- This can also be done on a regular basis if necessary; for example it could be done once a semester, but in times of crisis, it may be necessary to meet more frequently.
- Members should be prepared again, to answer questions and give information; talking points should be developed.

**Methods:**

- The session should start with a short presentation by an association spokesperson and then as much time as possible after for questions and answers. There should be time as well for people to socialize and circulate and continue discussions one-to-one with parents.
- Two or three members should attend each session, and should bring coffee and cookies, and stay around afterwards to help clean up.

**Considerations:**

- You may be invited to an anti-education group, who just want to “sucker you in.” Know who are your enemies within the community, and what their goals are as well. You may want to attend an anti-education meeting, but don’t go there to argue, just go there to present your information, and answer questions.
- Once these klatches begin, there will be great demand for them, be prepared to attend multiple klatches during times of crisis.

**Category:** Community

**Tactic:** Petitions

**Description:** A way in which you can broaden your support for your issue by having the community voice their concerns as well. This can be used to get a name on a ballot for a local school board race and can be similar to a letter writing campaign, if your attempt is to get more support.

**Preparation:**

- Decide what issue you want to have the community support. This should be specific, and should be done in a way so that signing the petition shows that they support you in your efforts.
- Consider first having members solicit signatures at locations that will allow you. This could be the local K-Mart, or post office. Be sure you are aware of any local ordinances that might limit your ability to collect signatures.
- If necessary, you may want to consider going door-to-door (in the same way that you set up a leaflet, you will want to set up a canvas for signing petitions). Should door-to-door be the case, you will need to have your members be prepared to talk and answer questions by the community as to why they should sign a petition.
- Talking points, and a handout are good items to have for each member.

**Methods:**

- Each person circulating the petition should:
    - Personally witness each signature
    - Verify before a notary public that you witnessed each signature
    - Insure that each petition signer is a registered voter in the state
    - Have on each sheet the following boxes:
      - Signature
      - Printed name
      - Address
- (This is vital if you are having a petition for getting someone on a ballot.)

**Considerations:**

- When deciding to do a door-to-door campaign, be sure that you do the same amount of preparation as you would for a leaflet. In this case the members will need to be much more educated about the candidate or the issue they are having the community sign on to.

**Category:** Community

**Tactic:** Mass March

**Description:** This is helpful if you have a very active and large local and are convinced that members will turn out for the march. Can be a good way to build morale and show solidarity to the community.

**Preparation:**

- Determine where you want to march, and what the purpose is for the march. If you have an upcoming school board meeting, and you want to build this as part of a rally or orchestrate a large gathering, doing a mass march is a good idea.
- It is a good idea to have speakers either before the march or after the march as a way of culminating or beginning the efforts. If you are marching to an event, review with local authorities what types of permits if any you will need to have.
- Provide a map for members, with a clear start time, and end time. Explain the purpose behind the march as well.
- Check for the availability of “portable potties” for the march.
- Be familiar with the area, and check it out for hazards along the way of the march.
- Have signs made up and hold a sign making party.
- Be sure the local media is aware of the march and the purpose behind it.

**Methods:**

- Designate lead organizers who are responsible for directing the marchers and keeping order during the march. They should be positioned throughout the group to keep them on task. They can also be helpful for leading chants during the march.
- Have organizers be designated with armbands for clear direction.

**Considerations:**

- Doing a march is a good way to relieve frustration, show strength, build PR, gain support and change opinions. When you are contemplating a march, be sure you have enough members who are interested in doing it. It can be very demoralizing if you have a march planned and don't have members show up.



**Category:** Parents

**Tactic:** Letters to Parents

**Description:** This is a tool that can be used to communicate directly with the parents of the children in the school.

**Preparation:**

- For teachers, have them write letters to parents on the local union's letterhead. This will send a message of solidarity, but also will get the parents used to the idea of the union, and that their child's teacher is involved.
- Write notes to parents on a regular basis, this should be personal at first, then once you've started writing them, you can also develop multiple letters that can be sent to any parent.
- It is good to start off with something that talks directly about how their child is doing, and then begin to deal with issues that may impact their child's education.
- If you have developed a relationship with the parents, it can be useful at some point to ask the parents to assist you in your efforts to mobilize.
- You can also use a bi-weekly letter that is sent to all parents from a particular teacher giving them classroom updates, and also have points in the letter about the issue you are trying to get them to understand.
- This is time consuming, and it may be helpful to have form letters to show teachers what information would be appropriate in a letter to parents.

**Consideration:**

- Keep in mind, that the parent's interest is from their child's perspective. They want what is best for them, so in writing your letters, always keep that perspective in the back of your mind. Make it personal.
- Consider using this to convey information not only about how the child might be doing, but also other issues that the parents should be aware of.

**Category:** Parents

**Tactic:** Phone Calls to Parents

**Description:** Can be used similar to letters to parents, but this is more personal than a letter.

**Preparation:**

- Prepare in the same way that you would if you were writing letters home to parents. Keep the information specific; you can establish the relationship by dealing with their specific concern...their child.
- Once you have established your relationship, you can inform them of issues that directly affect you and most importantly, their child. This should be done in a subtle way. You don't want to make a call that says, I'm underpaid and I want you to feel sorry for me.
- Have a list of talking points for anyone making calls. This can be useful when a question comes up from a parent that is concerned about the issue you are trying to work on.

**Methods:**

- Keep the conversation short and to the point. If you are calling only to solicit their support be sure you are clear as to what you want them to do in the future.

**Consideration:**

- In the same manner as letters to parents, the parents should see a phone call as the educator looking out for the individual child's concern. If you take the approach that the child is secondary, the parents will know it, and won't be supportive of your efforts.

**Category:** Parents

**Tactic:** Homework Hotline

**Description:** This can be something that can be started by the members to assist students with their homework, and also a way to connect with parents.

**Preparation:**

- You'll need to decide how to staff the hotline.
- You'll need to be sure that if you have multiple grade levels, which is responsible for each level.
- You may want to use this as an opportunity to connect with parents at their homes.
- If necessary, be sure that those that staff the hotline are comfortable with issues that they may be questioned on.

**Methods:**

- This should be used to help students, as it also will give you a direct line to parents.
- Have talking points available.

**Consideration:**

- This may take a lot of time to prepare and to staff a hotline. Be prepared to work with phone companies or use cell phones in order to deal with logistics.

**Category:**                **Media**

**Tactic:**                **Ads in Football/Basketball Program**

**Description:** Writing an ad that will appear in the school program explaining the current situation that the school and the members face.

**Preparation:**

- Find out from school printer what is the deadline for advertisements.
- Find out any restrictions on who or what group may place ads.
- Should there be a restriction on staff having ads in the program, consider contacting a local merchant who is supportive of your cause and ask him/her to sponsor your advertisement.

**Considerations:**

- When doing advertisements, be sure that the ad talks about how the school and the students are impacted by the current situation, to have the broadest appeal.
- Depending on costs or restrictions, you may consider writing multiple ads, where you have testimonials for example, that talk about the current situation.

**Category:** Media

**Tactic:** Meet with Editorial Board

**Description:** A small group of local leaders meet with the local newspaper's editorial board to describe their situation and ask for support from the editorial board.

**Preparation:**

- Contact local newspaper and inquire what the process is to meet with the editorial board. Schedule a time, up to one hour to meet directly with the editorial board.
- When preparing to meet with the editorial board, the group should designate a spokesperson that can deliver the information to the editorial board clearly and concisely.
- Contact WEAC's Public Relations campus for more in-depth information regarding editorial boards.

**Methods:**

- Remember to stay on message.
- You're there to state your case, so bring any fact sheets, or question and answer books you have that make your case stronger.

**Considerations:**

- Not all newspaper editorial boards will grant you a meeting, much less support your position, and so remember that you are not necessarily dealing with people who are going to be sympathetic. Some in fact, may be down right hostile.
- Don't argue with members on board, making a bad impression is worse than making none at all.

**Category:**                    **Media**

**Tactic:**                    **Public Service Announcements**

**Description:** A member of your local makes a public service announcement on a local radio describing the current situation to the public, and asks for support in your efforts. This may involve asking the public to do something specific.

**Preparation:**

- Inquire with local radio stations about the costs associated with making a 30 to 60 second public service announcement.
- Be certain that the audience you target is in the radio's market. Ask for their market demographic information.
- Once you have decided to do this, begin by drafting a script. Be sure that your script is clear and stays on message. For specific assistance on writing radio ads, contact WEAC Public Relations.
- Decide what activity or what action you want to attain by doing the ad; and make sure in the end this is accomplished.

**Considerations:**

- The cost to do an ad may be expensive, so be sure you have your target in mind and can articulate your position to the general public.
- Be sure you go through several practice runs, and several revisions to make your information relevant and important to the general public.
- You may need to run several ads in order to see a change; generally, someone needs to hear your message seven times before it begins to sink in.

**Category:**                **Media**

**Tactic:**                **Letters to the Editor**

**Description:** An inexpensive way to reach the community is to have letters to the editor submitted by members of the bargaining unit.

**Preparation:**

- Should you decide to write a letter to the editor, be sure that your letter is well written and to the point.
- If you use data, it should be accurate.
- Watch your use of jargon.
- Submit the letter to the local leadership/action committee to be sure that it is consistent in the message you are trying to get out to the community.
- Decide if you want to have letters from members representing themselves, or have leaders write letters representing the membership. Both are effective.
- Submit the letter for mid-week publication.

**Methods:**

- Create a sense of urgency and propose specific ways in which the reader can take action.
- Advocate your position; don't try to rationalize the board's position.

**Consideration:**

- Remember that it is important to have letters to the editor in response to a negative article that is written in the newspaper regarding your cause. It is helpful to have members assigned to be the watchdog of the newspaper for articles that appear to be biased or slanted, and that the association have a response.

**Category:**               **Media**

**Tactic:**               **Press Releases**

**Description:** This is an opportunity to write a story for the media to use about a current situation that is occurring at the worksite.

**Preparation:**

- Consider what you're attempting to have the media respond to. If you are announcing an event, you don't want to give the entire story to the media before the event occurs. It is best to give the information to the media about when and where, but save the story for the event. At the event you can then hand out a press release that gives the story to the media.
- A press release should be no longer than two double-spaced pages.
- Use short sentences and paragraphs.
- Make certain facts are absolutely accurate.
- Check for proper spelling of names.
- Avoid jargon and technical terms or explain them if they must be used.
- Don't use initials without indicating what they stand for in the first reference.
- Write factually and objectively – avoid editorializing and using adjectives.
- Insert pertinent quotes from local officials, specific examples and anecdotes.

**Methods:**

- If you are at an event, have the story written for the reporter, be sure that in the first paragraph, your message and your point is delivered.
- At any event, be on the lookout for the reporter and be sure your spokesperson talks to them.

**Considerations:**

- The press get numerous press releases announcing events every day, consider the day of the week you schedule an event on, in terms of what kind of coverage you will get.
- Have the personal contact with the reporter so that he or she knows you, and would be more inclined to attend the event.



**Category:** Media

**Tactic:** News Conference

**Description:** A staged way that you can get your message out to the community with the help of the media. Be sure however that it is news worthy, has a personal side to it, uses pictures, and has a quote that can be used as a sound bite.

**Preparation:**

- The key to a successful news conference is to make sure you really have important news to announce. If you "cry wolf" too often with "no news" conferences, the media may not turn out when you do have something important to say.
  - Send a news release to every community news outlet three to five days before the event. (In urgent situations, notification can be handled by telephone.)
  - Direct the release to assignment editors, news directors and reporters, giving them the date, time, place and topic of the conference.
  - Schedule the conference to coordinate with media deadlines.
  - Make follow-up calls the day before the conference urging reporters to attend.
  - Select a location and room for the press conference; the local headquarters is often a good site.
  - A familiar public place will do if the local's offices are not suitable; or try to pick a site that relates to the news story. (If you are talking about poor conditions in a school, hold the press conference at a school.)
  - Choose a room that is large enough to accommodate the media, cameras and other equipment
  - Make sure there are plenty of two and three-pronged electrical outlets for reporters' equipment (lights, recorders, typewriters).
  - Provide a lectern that can hold several microphones.
  - Display the local logo in a prominent spot that does not have glare.
  - Provide chairs for reporters, name cards for speakers and an easel for visual aids.
- Almost all news conferences should offer visual presentations for television cameras and print photographers.
  - Display visuals prominently near the front of the room for easy reference by the speaker

- Keep visuals clean and simple; remember that the visual may receive only two or three seconds of actual TV time
  - Use colorful charts and graphs to demonstrate goals you've set and achieved
- Media kits should be prepared for reporters attending the conference (and to deliver afterwards to those who do not attend). They should include:
  - A copy of the spokesperson's statement
  - A news release detailing the topic
  - Biographical information and photos of the speakers
  - A fact sheet or brochure on your local, state, and national affiliation
  - Reproductions of charts or graphs used
  - A slide of the local's logo so TV stations can project it during the news story
  - Review the issues with the speaker(s)
  - Take the role of a reporter and ask the spokesperson those difficult questions that may arise
  - Have other officers attend the news conference to provide expert information and moral support
  - Consider all statements as "on the record"
  - Double-check the conference room about an hour before the event to make sure everything is set
  - Unlock the room and set up chairs
  - Provide a media sign-in sheet so that you can follow up and make further contact
  - Consider serving modest refreshments
  - Start the conference on time; limit it to 30 minutes
  - Have the media liaison or PR committee chair introduce the speakers
  - Conduct a question-and-answer session after the statement
  - Have a room available for follow-up interviews

**Category:** Board and Administration

**Tactic:** Pack School Board Meetings

**Description:** Fill the board's meeting with members and supporters to show the presence, interest, support and potential activism of the members and their allies.

**Preparation:**

- Prepare a media statement and fact sheet, and select and rehearse a spokesperson
- Announce the event to members and gain commitments in advance
- Produce and distribute any needed materials
- Notify the media of your presence and purpose

**Methods:**

- Just attendance without any statement is a small, entry level activity
- Group can sit together as a block or spread out to have a presence throughout the room. Consider which will have the most impact, be comfortable, and provide the best photo op.
- Over crowd the room and demand that the meeting be moved to a larger venue. Try to bring enough people that they could exceed the posted fire code restrictions for the room. If the board agrees to move, then consider going home as the board moves to a large, empty space.
- All members and supporters could be visibly identified through a common color, button, etc.
- Bring papers to correct and stage a "grade in"
- Arrive early and clog the parking lot

**Considerations:**

- Members who participate may be willing to do something more interactive as a subsequent step.

**Category:** Board and Administration

**Tactic:** Speak at School Board Meetings

**Description:** Bring a crowd of members and supporters to a school board meeting to make public statements in the open forum portion of the meeting.

**Preparation:**

- Determine appropriate themes and message.
- Select articulate spokespersons. In addition to the usual officers, include members who are not perceived as union activists.
- Provide them with interrelated message outlines.
- Rehearse the speakers and include attention-grabbing quotes and “sound bites.”
- Notify the media. Introduce yourself when they arrive, give background information and fact sheet, point out articulate members and inarticulate board members they could interview.
- Themes may include:
  - The desire for great schools that depend on a great staff and which benefit everyone.
  - Decline in staff morale.
  - Staff turnover, shortage.
  - A call for fairness.
  - False expressions of appreciation from the board.
  - Administrative raises and junkets.
  - Other non-essential district expenditures.

**Methods:**

- Association speakers attend the board meeting and follow the procedures, if any, to register to speak in the open forum portion of the meeting.
- Speakers should be brief and address common themes.
- Fill the room with members and supporters.
- If members are carrying signs, the signs should coordinate with the message of the speakers.
- Have a supportive parent or community leader speak and call on the parties to reach a fair settlement.

**Considerations:**

- The board may try to prevent the Association from speaking. This should not be well received, and the spokesperson should challenge the board’s motivation for attempting to silence its own employees, taxpayers and citizens. If Association leaders have previously been allowed to speak, the spokesperson can make a “past practice” argument and ask the board if it is their intention to interfere with the right of a labor organization to represent its

members, or of citizens to exercise the right of free speech. While these may or may not be compelling from a legal standpoint, they may be effective in baiting the board into making any number of foolish public statements. The board ultimately has the right to conduct their own meeting. Subsequent speakers, if any, can rise to yield their time to the designated spokesperson.

- Capitalize on any divisions within the board—target villains and praise supporters.
- Consider whether the bulk of the audience will be supportive. Play to them, the media and the members.

**Category:** Board and Administration

**Tactic:** Parents and Community Members Speak to School Board

**Description:** Supportive parents and community members speak on Association's behalf at School Board meeting

**Preparation:**

- Identify supporters. Focus on individuals and groups with self-interests that are served by public education and member well-being. Look for articulate and respected individuals within supportive groups.
- Provide supporters with information and fact sheets. Suggest themes for their presentation if they are receptive.
- Weave statements from Association leaders around the statements of supporters.
- Themes may include:
  - The need for labor peace.
  - A call for fairness.
  - The value of education in the life of the community—  
Helping children and preparing the leaders of tomorrow.
  - The desire for great schools that depend on a great staff and which benefit everyone.

**Methods:**

- Supporters speak in public forum segment of school board meeting.
- Supporters call or visit board members to express support for a fair settlement.
- Supportive groups pass a resolution of support for the Association.
- Supporters hold their own forum or press conference to issue a statement of support.

**Considerations:**

- Select speakers carefully. Don't put people in a powerful spot if you are uncertain as to what they will actually say.
- Outside speakers may drift off message. Be prepared to put forward other speakers who can gently correct the course of the evening.
- Be prepared to give media representatives background information about the speaker.

**Category:** Board and Administration

**Tactic:** Carry Signs at School Board Meeting

**Description:** Members attend school board meeting carrying signs.

**Preparation:**

- Signs can be on sticks or large placards. Placards work better indoors and picket signs work better outdoors.
- Hand-lettered signs are more personal and are generally more effective than printed signs.
- Members should be informed in advance of the message for the meeting and some starter ideas for slogans should be offered. Members should exercise their own creativity in creating signs themselves.
- The local may want to use materials that are visually consistent with other bargaining campaign efforts, such as shirts, buttons, newsletters, etc.
- Have a sign making party a day or two before the event.
- Prepare to pack the room. A small group with big signs does not send a message of strength.

**Methods:**

- Members can line the edges of room and remain standing so their signs show. This works particularly well if the area seating is limited or filled.

**Considerations:**

- Provide members with materials for the signs. The Association should purchase its own materials and should save the receipts to defend against any charge of pilfering district supplies.

**Category:** Board and Administration

**Tactic:** Picketing Meetings

**Description:** A crowd of members and supporters carry signs outside the school board meeting, mediation session, or other appropriate event.

**Preparation:**

- Prepare signs that convey the Association's message. Signs should be easy to read, easy to carry, and should be able to stand up to weather conditions. Staple guns, water-proof markers, small signs and sturdy sticks are all of value.
- Determine what chanting, if any, will be used.
- Recruit and prepare "marshals" to keep lines evenly spaced, and to move the group as may be needed.
- Select a visible location for the picket line.
- Notify the media and be prepared to offer a message.
- If photographers or TV crews are present, group people for the best shot. Place a large group in a small space, create a long thin line, or if in a large space with a small group, clump them together and hope the photographer goes with a tight shot.
- Have participants arrive early so the line is in operation as people begin to turn up for the meeting.

**Methods:**

- Give a brief 2-minute orientation and pep talk to picketers before they begin regarding purpose, attitude, conduct and message.
- Keep line in operation until most attendees have entered the building, then move picketers indoors to attend.

**Considerations:**

- Entering the meeting in a disruptive manner could result in charges of disorderly conduct or disturbing the peace.
- If the picketing involves city streets or sidewalks, a parade permit may be necessary.



**Category:** Board and Administration

**Tactic:** Run The Gauntlet

**Description:** Participants form two lines to create a tunnel through which board members must pass to enter a building or meeting. This is often done when picketing a meeting.

**Preparation:**

- Same as “Picketing Meetings”
- This tactic can be used at the entrance to a building or in an indoor corridor.

**Methods:**

- Lookouts should be posted to give notice to the picket captains that the board is starting to arrive. The captains then quickly move participants into the two lines.
- Some groups chant, some stare at board members in cold silence, and others warmly greet the board as they pass by, and others heckle board members or demand a settlement.
- After board members pass through, the lines can file in directly behind them and take positions in the meeting room with their signs.

**Considerations:**

- Same as “Picketing Meetings”

**Category:** Board and Administration

**Tactic:** Media at Meeting

**Description:** Have a media presence at a crucial School Board meeting. This greatly multiplies the impact of a statement or demonstration because it makes the entire community (or media market) witnesses to the event, whereas statements made only to those in attendance create little or no community pressure on decision makers.

**Preparation:**

- Select which media you would like to invite. Consider those with an large audience in your community, those with whom you have a relationship, and those best equipped to convey your message (a crowd looks good on TV, and a lone speaker may be best represented in print). Do not rule out those who have an unsympathetic editorial viewpoint. Even a biased article can advance your message, and may alert individuals and other media to come to you for a more accurate take on the facts.
- Prepare a fact sheet or other briefing materials so the reporters can have a written source of facts to use when they prepare their story.
- Look at the location of the event through the eyes of photojournalist. Where should participants be located, how will the lighting be, and what would be the best angle to create the best shot?
- Prepare and send a press release at least 24 hours in advance of the event. The release should include the time, date, and location of the event, as well as a description of what will happen and the perspective and message of the Association. Also include contact data and available times so the reporter can get additional information.

**Methods:**

- Greet members of the media as they arrive. Give them an overview of the event, where people will be, what they will do, and who will speak. Be concise. Don't tell them how to do their job, but make it easy for them put together a story.
- Provide reporters with a fact sheet or briefing materials. If appropriate, provide reporters with the text of any prepared statement that will be made.
- Introduce reporters to the Association's designated spokesperson.
- Be available during or after the event to answer questions or provide additional background.
- If asked by a reporter who they should speak with from the other side, consider pointing out a board member or administrator who is inarticulate, nervous, ill-informed, or likely to say something inappropriately hostile and inflammatory.
- If possible, consider providing all participants with message palm cards and prepare them to deal with the media. Not only will some reporters grab a few

people at random to interview, but it can be very impressive to if you can invite them to pick *any* of your members to question in addition to the designated spokesperson.

- Be sure the reporters have an opportunity to ask follow-up questions before they leave (they often leave early), and give the contact information in case they want more information before they turn in their stories.

**Considerations:**

- If the meeting is a closed meeting, inform the press in advance and let them know what they can expect outside. Do not invite the press, then close the meeting yourself—let the board be the party with “something to hide.”
- Always take the initiative in dealing with the press. It is better to play offense than have to react to someone else’s strategy, and it is better that the Association be seen as a source of news than the district.

**Category:** Board and Administration

**Tactic:** Candlelight Vigil Outside Of Meeting

**Description:** Participants hold candles and stand or march quietly outside of building before (and perhaps during) meeting.

**Preparation:**

- Make sure the location will be adequately dark at the time of the event. Candlelight has little visual impact before dusk or in well lighted areas.
- Obtain candles and lighters. Purchase or create drip shields.
- Check the weather forecast. A breeze will blow out candles and a cold evening can create more discomfort for participants than for the board. Have an alternate plan if the weather is uncooperative.
- Have boxes available to collect candles as participants leave.

**Methods:**

- Have participants arrive early so the vigil is in operation as people begin to turn up for the meeting.
- Give a brief 2-minute orientation and pep talk to picketers before they begin regarding purpose, attitude, conduct and message.
- It is generally more effective to maintain silence.
- Keep participants spread out evenly. A long line looks better than a bright cheerful clump.
- One to three speakers should enter the building to make state the Association's message and speak about the event.
- The vigil can end shortly after the meeting begins or when the media has left.

**Considerations:**

- Remind participants to keep open flames away from clothing, hair, paper, dried leaves, etc.
- Have a fire extinguisher on hand.

**Category:** Board and Administration

**Tactic:** Contact School Board Members At Home

**Description:** Members and supporters contact board members at their homes by phone, mail or e-mail to express displeasure and to call for fair treatment.

**Preparation:**

- Select appropriate time and message for this contact.
- Prepare and distribute the materials mentioned above.
- Select board members who are anti-member or who are key decision makers.
- Distribute list of the board members names, home phone numbers, addresses and e-mail addresses to Association members and supporters. Include talking points.
- Distribute board contact information to parents and supporters, along with a fact sheet.
- Specific board members can be targeted one at a time or all together, and on predetermined dates.
- Have a series of members and community supporters visit the board member at his or her doorstep.

**Methods:**

- Callers should address themes of fairness, respect and desire or a settlement. They can talk about how they feel about the situation in general, but should not attempt to bargain specific positions.
- Postcards or form letters can be distributed to members and supporters. They can be pre-printed or members can write their own brief messages based on suggested themes.
- Though more expensive, letters might have greater impact if they are sent Certified Mail/Return Receipt so the board member will have to sign for each piece of mail.
- An e-mail campaign can be waged at a specific date and time. Multiple messages, especially if they contain graphics, can overload inboxes.

**Considerations:**

- Be sure that any mailing meets postal service guidelines.
- Placing calls late at night may have legal repercussions or may solicit sympathy for the targeted board member. Keep in mind that many may now have Caller ID.
- Obscene or threatening messages or graphics may also create legal and public relations problems. Caution members accordingly.
- Spamming or picketing a board member's place of business could alienate an employer or business that the Association may prefer to have as an ally.

**Category:** Board and Administration

**Tactic:** Picket Board Members Homes

**Description:** Set up a picket line in front of the home or business of board members that refuse to work cooperatively with the Association.

**Preparation:**

- Develop a profile sheet on each board member, including their community affiliations, place of business, income, recent raises, current benefits, etc.
- Determine when the targeted board member returns from work or is likely to be at home.
- Notify the media.
- Obtain information about parking, public v. private property, etc.
- Determine the best parking locations for members. If parking is limited, consider running a minivan shuttle.
- Have picket signs available.
- Inform members and recruit for the event.

**Methods:**

- Picket a home at a time that will have greatest visibility to board member and his or her neighbors. This will often be when they arrive home from work or on a Saturday morning.
- Picket a business when the board member is at work and perhaps during peak customer or traffic hours.
- Have fact sheets available for neighbors and passers-by.
- Hit several board members at once, or in a random rotation.
- Leave one board member out to create uneasiness and suspicion among his or her peers.
- Consider the candlelight vigil option at a board member's home.

**Considerations:**

- If picketing a board member's home or business, be aware of regulations regarding parking, noise levels, trespassing, and parade permits. Violating these regulations could turn the event against the Association.
- Be respectful of neighbors, customers and businesses, as they may include or become supporters.
- Weather.
- Dogs and sprinkler systems.

**Category:** Board and Administration

**Tactic:** Boycott Board Members Businesses

**Description:** Encourage members and allies to boycott the businesses of school board members.

**Preparation:**

- Determine whether the board member owns the business or is an employee.
- Assess the effectiveness of a boycott against the business. Perhaps the loss of revenue or the business owner will pressure the board member to make the boycott end, or perhaps the tactic would alienate allies.

**Methods:**

- Announce boycott to members and supporters.
- Announce boycott to media, perhaps in a news conference or in front of the establishment itself.
- Invite other unions to participate.
- Encourage the community to join the boycott through leafleting, letters, advertising, etc.
- Distribute leaflets to customers in front of board member's business.
- Place flyers on windshields in parking lot at business.

**Considerations:**

- Consider whether members of other unions are employed at the business. It would be better to have other unions and their members as supporters.
- If the business is not frequented by significant number of Association or community members, it will not be an effective target for a boycott.
- Take into account local regulations regarding parade permits and solicitation on private property.

**Category:** Board and Administration

**Tactic:** Vote Of “No Confidence” In Superintendent

**Description:** Take a vote of membership on the question “Are you confident in the ability of the superintendent to provide effective leadership for this district.” Publicize the results if the vote is strongly negative.

**Preparation:**

- Determine whether the target is the decision maker and whether he or she is vulnerable.
- Prepare ballots.
- Prepare BRs or other union officers for the internal local balloting.
- Select or create the proper venue for releasing the information.
- Issue a press release to bring the media to the event without letting them know in advance the result of the vote.

**Methods:**

- Conduct a legitimate internal vote on the question.
- Do not pre-publicize the election. If the results are inconclusive or do not serve the needs of the Association, it will be better not to have created any media or public expectation of a result.
- If the level of “no confidence” is very high, announce the result of the vote at a public school board meeting or a press conference.

**Considerations:**

- Follow locals’ constitution and bylaws for taking vote.
- Avoid slander and libel. Board members may be considered public figures, so the Association has a degree of latitude, but must make certain that statements are factual.



**Category:** Board and Administration

**Tactic:** Publicize Administrator Salary Increases

**Description:** Announce the salary increases of the superintendent or other key administrators who may have a role in the bargaining process.

**Preparation:**

- Obtain accurate information regarding the administrator's previous and current salary, benefits, and other perks (travel, clothing budget, scholarship funds for children, car allowance, etc.). This can be done through a union request for information under 111.70 or an Open Records request under 19.34 *stats*.
- Perform any necessary calculations to create a comparison with the district's offer to union members.
- Using a dollar amount will, in most cases, sound more significant. Since administrator salaries are higher, a small percentage will yield a higher dollar amount than would the same percentage applied to member pay.
- Determine the salary increase of the superintendent, HR director, business manager and prominent administrators.

**Methods:**

- Release this information through a press conference, through an Association speaker at a board meeting, in fact sheets, and by other means.
- Call attention to any disparity in treatment, value and respect between those who work with children and those who sit in an office and push paper. Make arguments based on equity and fairness. Accuse the district of having misplaced its priorities.

**Considerations:**

- If the district refused to provide the requested information under 111.70, then ask for it under the terms of the Open Records law. Give them a 48 hour time limit and, if they do not provide it in that timeframe, take a letter to the county District Attorney demanding a writ of mandamus to force compliance.

**Category:** Board and Administration

**Tactic:** Publicize Administrators' Junkets and Costs

**Description:** Almost every administrator goes to winter conferences at distant, warm-weather resorts. Exposing these expensive trips provides an opportunity to challenge district claims that they need to save money, especially if such claims are delivered by an administrator with a suntan.

**Preparation:**

- Be aware when administrator is scheduled to be absent or suddenly looks tanned and rested.
- Obtain cost information from district financial records, such as monthly expenditure reports.
- Calculate the impact the money spent of the trip might have had were it spent on salaries, supplies, equipment, etc.

**Methods:**

- Expose administrator travel and its cost publicly at a school board meeting and in the media.
- Link the expense to the impact that money would have had on a member's pay (i.e., "More than enough to fund the annual raise for five members").
- Place travel brochures from the junket's destination in staff rooms. Label the brochures with the administrator's name or attach appropriate information.
- Wear sunglasses and tropical clothing (perhaps at a school board meeting) when the administrator returns so he or she will have an easier transition back to the regular grind.

**Considerations:**

**Category:** Board and Administration

**Tactic:** Members Request To Review Personnel File

**Description:** All union members have the right, by law and perhaps also by contract, to periodically review the content of the personnel file. These files are usually kept at the district office, though sometimes they may be located at each worksite. Each member can simultaneously submit requests to review the content of their file at the same time and date. Doing so may create a large crowd in the office and make administrators uncomfortable. It may also reveal any adverse documents which have been slipped into members' files and will reinforce the importance of inspecting files.

**Preparation:**

- Determine location of personnel files.
- Review contract language which may describe any procedures for requesting to inspect the file.
- Select dates for filing the requests and for inspecting the files.
- Quietly communicate details to members.

**Methods:**

- Members send simultaneous requests to inspect their personnel file in writing or by e-mail, return receipt.
- Members clog parking lot and office as they inspect their files or wait for access.
- Members may want to bring papers to grade and spread out comfortably with their work.
- Members should be somewhat loud and obtrusive, or quiet and sullen, as determined in advance.
- Each member should read every page of every document. Slowly.
- The local may choose to provide forms so members can inventory the date and description of every document in their files.
- A grievance officer should be present to answer questions about documents and make notes regarding any documents which need to be challenged.
- If circumstances warrant, the tactic should drag out as long as possible.

**Considerations:**

- The district may claim that it only has to provide access at reasonable times and places, that the abundance of requests will be met over an extended period of time. The Association should counter that it is reasonable to grant such requests within 48 hours and any other procedure is a failure to comply.
- There is no need to torment the clerical staff, particularly if they are also Association members or allies.
- Excessive noise or disruption could lead to police intervention. Make sure members behave within reasonable limits.

**Category:** Board and Administration

**Tactic:** All Members Request Personal Leave

**Description:** Some contracts contain provisions for personal leave. If all members simultaneously request leave for the same day, it creates a rush for subs and forces administrators to consider denying requests for leave (which may or may not be allowable by contract). It may also give the appearance that the local is planning a one day strike.

**Preparation:**

- Review contractual provisions regarding use of leave. Determine whether personal leave is available, how members may apply for personal leave, how much notice they must provide, whether they must pay for their own substitutes, whether there are restrictions on when personal leave can be used, and when or if such notice can be revoked.
- Select a date for which to request leave, the date on which to submit requests for leave to the district, and the date on which to withdraw the requests.
- Prepare a form letter requesting a day of personal leave for the pre-determined date. Alternatively, ask members to write their own letters and do not create a paper trail that easily links the activity to the union.
- Inform members quietly and distribute materials.

**Methods:**

- Each member simultaneously submits a letter of request for personal leave on the designated date.
- Keep quiet for awhile. Let the administration and perhaps the media wonder for few days.
- Each member simultaneously submits a letter to the district canceling their request for leave.

**Considerations:**

- Be careful not to end up in a situation in which members are forced to take a leave at their own expense.
- Consider whether the actual mass use of personal leave will be contractually allowable, whether it constitutes an illegal work stoppage, or both.

**Category:** Board and Administration

**Tactic:** Mass Requests For Letters Of Recommendation

**Description:** All members ask their administrators to write letters of recommendation on their behalf. This may irritate administrators, who may in turn pass the sentiment forward to the superintendent and board. It also can communicate the possibility of a mass exodus of members from the district due to dissatisfaction with compensation and treatment.

**Preparation:**

- Quietly inform the members without creating a paper trail.

**Methods:**

- All members ask for letters of recommendation on or about the same time.
- The Association may decide to sponsor corresponding events, such as resume writing workshops or job fairs.
- The local may want to start posting lists of job openings in other districts, highlighting higher salary ranges.
- Salary schedules from high paying districts should be left on staff room tables.
- The Association should *not* notify the press, but a subtle leak that a lot of members may be considering leaving may not hurt if it is not traced back to the local.

**Considerations:**

- This tactic is useful if it creates the impression that many people may actually leave. This can be reinforced by linking the requests to high-turnover rate and below average salaries, if the facts support this argument.
- If the building administrators are not “secondary targets” who pass information and pressure back up the pipe, the tactic may not be effective.
- This tactic may interfere with members who actually *are* planning to leave the district and need letters of recommendation promptly.

**Category:** Board and Administration

**Tactic:** Car Signs School Parking Lot

**Description:** Member cars are islands of personal property in the sea of the school campus. Large signs in vehicles can be used to express a message.

**Preparation:**

- Decide on the appropriate message.
- Produce sun shades or appropriate signs.
- Determine optimal locations. Parking lots by busy streets are ideal.
- Enlist member support and distribute signs.
- Keep a list of phone numbers or home e-mail addresses to inform members of changes in message, if any.

**Methods:**

- All cars could have the same message, either on a pre-printed sun shade or on large poster board fitted inside the windows.
- The message can remain the same, or be suddenly changed at the discretion of the local. Regular changes will keep “readership” high.
- A row of cars could be parked together to create a long Burma Shave type of message. Large vehicles of similar height, such as minivans and SUVs, will be the most visible, particularly if their rear windows are used for the display.
- Large plywood signs can be mounted in the back of pickup trucks.
- The Association may also produce bumper stickers or radio antenna flags.

**Considerations:**

- Avoid statements that could be found to be disruptive or obscene.
- Be sure that there are no firearms, explosives, alcohol or drugs in the cars. Even hidden items could be found in a search or by a police dog.

**Category:** Board and Administration

**Tactic:** Post Signs In Staff Rooms

**Description:** The Association may have language or past practice that allows the posting of union information on designated bulletin boards in staff rooms or other work site locations. Information can be posted which will inform the members, add to the discomfort of the board and administration, and be visible to visitors and parent volunteers.

**Preparation:**

- Review relevant contract language, past practice, and grievance history.

**Methods:**

- Post the number of days the local has been working without a contract. Update the number daily.
- Post union bargaining newsletters. The administration intercepts them anyway, so this will not give away any secrets.
- Post the Association's bargaining fact sheet.
- Post articles about negotiations and job actions.
- Post articles about the (larger) raises people have received in other occupations.
- Post charts and graphs showing the members loss to inflation and the continued damage that would be caused by accepting the employer's current proposal.
- Post information about administrative raises and travel.
- Post member-generated editorials and commentary about negotiations.
- Post cartoons and satirical pieces about the board, the administration, and mock their bargaining position.
- If posted materials disappear, post five times as many copies. Also post them in the refrigerator, inside cabinet doors, in the staff restrooms, and other creative places.

**Considerations:**

- Avoid false defamatory information and libel charges.
- Avoid posting materials that are too far outside the comfort zone of members at their work site.
- Make copies offsite or follow contractual procedures to pay the district for the use of its machines.

**Category:** Board and Administration

**Tactic:** Display Resistance at Staff Meetings

**Description:** Staff meetings are an occasion in which Association members outnumber administrators. There are many ways to be present at a required meeting, fulfill contractual obligations, and register displeasure with the district.

**Preparation:**

- Review the contract to determine which meetings are required and how frequently they can be held.
- Determine whether the contract requires members to stay to the end of the meeting or till a specific time.

**Methods:**

- Do not attend voluntary meetings nor meetings held in excess of the number allowed by contract (work to rule).
- If there is a specific time at which the work day ends, all members should rise together (led by the BRs and officers present) and walk out together at the click of the clock.
- File into the meeting in silence, file out in silence.
- Only speak when spoken to. Do not volunteer answers, opinions, or information. Use as few words as possible.
- Bring other work to do and do not look up.
- Decide in advance either to make no eye contact with the administrator or to “stare and glare.”
- Sit with backs to the administrator if seating allows. If seating does not allow, turn the chairs.

**Considerations:**

- Be careful to avoid charges of insubordination, particularly against probationary members. Do that which is required, but no more.
- The effectiveness of this tactic depends on power and position of the administrator. If the administrator does not influence the superintendent, it may be of little value.
- Gauge the comfort level with these tactics of members at the work site. Pressing people to do something they may see as rude may alienate them rather than build support.



**Category:** School Board/Administration

**Tactic:** Demand Financial Data From School Board

**Description:** This is a way in which you can put the school board on notice that you'll be reviewing their paperwork to find the money they have stashed away due to accounting tricks.

**Preparation:**

- Request under open records law any and all materials associated with a school district's budget. This information can be requested via a letter to the Superintendent.
- Once the information has been obtained, review carefully the Fund 10 Balance, which all school districts have in their budget. This amount should be roughly 15% of their overall operating budget. Anything more than this amount isn't necessary and can be used in funding your contract.
- Decide how you want to publicize the information contained in the budget. In particular, look for such things as professional development or travel expenses relating to such professional development.

**Methods:**

- When determining the data, be sure to use the information in a way that supports your situation. For example, you can use the Fund 10 Balance information as an argument to make to your members regarding the district's ability to pay. You can also use the information from the professional development to embarrass the school board.

**Consideration:**

- It is very time consuming to go through school budgets, and can be very complex. However, look for ....(perhaps Jeff can add things to look out for)

**Category:** Worksite

**Tactic:** Establish Hot-Lines

**Description:** For this tactic, you would have established a communication structure where you can get information out quickly to your members, and can also allow for a structure that will put in place to let members know about the actions of the school board or Superintendent.

**Preparation:**

- Prepare your communication structure so that members are able to get information out quickly and efficiently. Use the ICON method to work with members to get them used to getting information out quickly.
- Test your communication structure by sending out a message that requires the membership to respond to what is going on at the table.
- Once you have established the communication structure, when a moment arises that a school board member or the superintendent put their foot in their mouth you can get the information out quickly to your members.

**Method:**

- This communication structure should be done in a way that one person starts the message and it is short enough that it can be communicated to everyone without the difficulty of having the message be altered in anyway.
- Remember to test the system before you have to use it for a crisis message.

**Considerations:**

- One of the most important things to do is to be sure that you have reliable members who can get the word out with the ICON system. If it fails during the test run, it is going to fail in times of crisis. Be sure you have it set up to catch the weak links before you really need it.

**Category:** Worksite

**Tactic:** Contact OSHA Regarding Health Violations

**Description:** In the event that there are potential health violations, or safety concerns, you should contact the Department of Commerce, which is the Wisconsin equivalent of OSHA for school employees, to report what potential violations exist.

**Preparation:**

- In the event that there are health and or safety concerns, it is important that these violations are reported to the proper authorities. In the event that you can make hay with them, through publications and notice to employees of these violations you should take advantage of it.
- Have Building Representatives report any potential violations that may be present. Also, review previous grievance history to find out any other grievances that have been filed regarding working conditions.

**Methods:**

- Following the visit by DOC/OSHA, have the findings published in the local newsletter. This can also be useful if you are waging your tactics in public, and wish to use some of these violations as testimony to conditions at the school.
- This can also be helpful information to notify parents of potential problems. Obviously, you'll have a natural ally if there are problems.

**Considerations:**

- Due to reductions in staff, there are very few air quality specialists working with the DWD, and the number of safety inspectors has also been reduced, so be prepared for some delay in having your complaint is processed.
- Depending upon what potential violation has taken place, there are various numbers that employees should call. Below are the appropriate numbers:
  - \* Safety & Buildings 262-548-8600
  - \* Building Inspection 262-521-5067
  - \* Elevator Safety 262-521-5444
  - \* Industrial Hygiene 262-521-5187
  - \* Safety Consultation 262-521-5063
  - \* Occupational Safety 262-521-5189
  - \* Indoor Air Quality 414-521-5187 or  
608-592-3974
  - \* Environmental Protection Agency (EPA)  
800-621-8431

**Category:** Worksite

**Tactic:** No Oral Communication With Administration

**Description:** The only communication with the administration should be simple yes and no explanations, unless the conference you are having with administration will impact upon a member's rights.

**Preparation:**

- For this tactic, you'll have to have a lot of broad support from your membership. It can be something that your members will find very challenging. You may consider having this done one day a week, perhaps on a day when staff meetings are scheduled. It can be a symbolic having members talk only to their co-workers, and not answer the administration.
- Do not continue this tactic if it has any impact on a member's rights. If you are in a discipline meeting, be sure you represent the member completely.
- Consider using only memos to communicate with the administration. This can be time consuming, but is also another way to show displeasure with the administration.
- Always consider your target. If this activity is going to impact an ally, then don't use it against a principal, but perhaps use it against the Superintendent.

**Methods:**

- When using this tactic, be prepared by having members write out answers to administration questions.
- This can be very challenging when you consider how often members communicate with the administration on a daily basis. It will open their eyes, and undoubtedly, management's eyes when they see how this operates first hand.

**Considerations:**

- Again, be sure you don't impact on a member's rights to enforce this tactic.
- This tactic may be most effective by doing it for a short period of time, as opposed to every day for a long period of time.

**Category:** Worksite

**Tactic:** Encourage Teachers To Leave School District

**Description:** This tactic can be used to inform both members and the community of the other opportunities that members who used to work in the school district now perform.

**Preparation:**

- For this tactic, you'll want to get information from teachers who have left the school district and find out why they left, and where they are working now. This can be done to get a historical perspective on the job market but also to use for publication.
- Consider sponsoring a job fair, or take up an advertisement in a job fair publication encouraging prospective employers to contact teachers about employment opportunities.

**Methods:**

- The collection of data should then be used to publicize what impact teachers leaving the profession have had on the school district. This can be done in an advertisement in the local paper, or in a letter to parents.
- If you decide to do a sponsor an ad at a job fair, offer a resume-writing meeting for all teachers. Publicize the meeting to the administration and the public.

**Considerations:**

- In the event that this is done, you should be concerned with how this is perceived by not only your members but also by parents. There may be a negative fall-out from some who may see this as defeating education.

# SECTION 6

## Power Tools



# POWER IS THE GOAL

For a group of workers to have collective power on the job, they need participation on three levels:

1. One or more **leaders** who put thought into what's happening at work, speak up, and propose action.
2. A normally small **group of co-workers** who work with and assist the leaders.
3. The support of **most or all of the rest** of the work group.



# *Building Full Capacity locals*

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## Building Full Capacity Locals

The TSTA has been a leading force in the improvement of public education in our state for more than 125 years. Our mission, to ensure that the education of our students and working environments of our members are of the highest quality, is carried out every day across the state by our local associations.

It should be clear to everyone that strong locals make for a strong TSTA.

Over the past few years, the many challenges that we have had to face at the state level have prevented us from focusing our efforts on local development. We are going “back to the basics” at TSTA and targeting our efforts and our resources toward helping every committed local in the state develop into a full capacity local—one that is vibrant, relevant, strong and dedicated to member service.

We know that strong local associations have the greatest positive impact on TSTA members. Our focus on building and strengthening local associations is now more important than ever before.

What does a full capacity local look like? How is it built and supported? These were the guiding questions we sought to answer during many months of conversations with local presidents, leaders, and staff across the state.

The Power Profile is the product of those discussions. It is a prototype that defines the essential components of a full capacity local. It is a model that staff, local presidents and future leaders can use to measure both the strengths and the opportunities for improvement in their own locals.

The Power Profile highlights nine indicators of a full capacity local that are critical for a local's success—advocacy; communications; a culture of membership; a finance system; internal and external governance; leadership development; association representatives; and political action. The components necessary to achieve full capacity status in each area are listed. The key to success is using the Power Profile to engage in long-range planning

TSTA is committed to providing locals with the support, resources and assessment tools needed to succeed if locals are committed to increasing their capacity for power locally.

There is still much to be done, but the end result should see more members actively involved at the local level, which will, in turn, strengthen local affiliates and our state association.

Full capacity locals DO Impact the Future!



# *Building Full Capacity locals*

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## Long-Range Planning

Key to the success of any organization is the shared vision held by the leadership team. In a full capacity local, this vision is supported by a well-developed, meaningful long-range plan designed to help the local achieve its long-and short-term goals. Long-range planning and goal setting are driven by the results of member input from focus groups, needs assessments, satisfaction surveys, etc. There is meaningful involvement at all levels by leaders, staff and members. There is a system in place for assessing and modifying the plan and the goals to ensure that they continue to represent the needs of the membership.

The Local Power Profile is a tool for leaders in a Full-Capacity Local to use in long-range planning for building a powerful, full-capacity local. A complete assessment of your local using the power profile will identify which components of the nine indicators need to be addressed in your local's plan. An objective review every year by the local leadership team will show the progress the local is making toward becoming a powerful, full-capacity local.

This document has been developed to provide assistance to local leaders and staff in the planning process. Building an effective long-range plan is essential to becoming a full-capacity local.

Building full capacity locals around the state will be an ongoing and evolutionary process. The goal is to get every local in the state to participate in increasing its capacity to at least some extent.

## *Building Full Capacity locals*

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### Advocacy: Exclusive Consultation and Member Defense

Advocacy in exclusive consultation and grievance processing, are the core services for which our members pay. In a full capacity local, members have access to the member rights structure and a clear understanding of the role and obligation of their association in the advocacy process. All members have an understanding of the concepts of collectivism and professional unionism as well as knowledge of the local's history. Association leaders are well-educated in the areas of exclusive consultation, advocacy and labor laws and receive ongoing training and updated information. The local's long-range plan addresses exclusive consultation goals as well as plans for ongoing grievance representation and awareness. Local leaders have a good, working understanding of the local school board policies.

The following components are necessary in the development of a full capacity local:

- Training on being an advocate/legal obligations of representation
- Training on handling grievances for the Member Advocacy Team
- Training specifically designed for building reps
- Development of problem-solving skills
- Development and use of member exclusive consultation surveys
- Regular updates for leaders on labor issues/law
- Exclusive consultation training that includes new strategies, techniques and concepts
- Accurate record-keeping and filing system
- Knowledge of exclusive consultation history of the association
- Training on the exclusive consultation process
- Exclusive consultation team training
- Specific strategies for bargaining release time, association days, etc.

# *Building Full Capacity locals*

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## Communications

A local association cannot succeed, create alliances, or persuade others to support its efforts without a strong communications plan that addresses both external and internal public relations. In a full capacity local, there is a standing communications committee with a well-trained, proactive, creative chairperson. The local's long-range plan contains clear goals for internal and external communications along with a plan of implementation. The leadership team is well-trained in such areas as Web site creation, newsletter writing, communication skills, media relations, and especially message development. Member communication is ongoing, frequent and in many forms. The association is visible in the community, at district functions, and in the local press. Members are provided with numerous, association-organized opportunities to meet together to socialize as well as to receive training and information.

The following components are necessary in the development of a full capacity local:

- Development of local media relationships
- Community familiarity with the association and its activities
- A regularly published member newsletter in electronic or paper format
- Training for communications committee in the development and implementation of an internal and external communications plan
- Local Web site design training
- Message development training
- Media training
- Regular use of the TSTA Web site
- Utilization of e-mail as a communications tool
- Regular use of [tsta.org](http://tsta.org) and [nea.org](http://nea.org) by leaders
- Planning of member social functions
- Communications with new members
- Specific PR training for local presidents
- Development of leaders' communications skills
- Training on how to write op-ed pieces/letters to the editor

# *Building Full Capacity locals*

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## Culture of Membership

A strong, relevant local depends on a steady influx of new energy and new ideas. A full capacity local recognizes this and has, as a part of its long-range plan, goals for the ongoing induction of new members. New members are provided with opportunities such as mentoring and induction, training and workshops designed to address their specific concerns, leadership opportunities, and organized social opportunities. There are ongoing opportunities for new members to provide feedback and voice concerns to the leadership team. New members are encouraged to get involved in meaningful association roles and are provided with the necessary training and information to ensure successful and continued involvement in the association.

The following components are necessary in the development of a full capacity local:

- Mentor program for new members
- Development of new member materials
- Planning and implementing new member activities
- Orientation of new members
- Specific PR program designed to target new members
- New member focus groups
- Meaningful association involvement in district mentoring program
- Local association involvement with student/intern teachers
- Association presence at job fairs
- Identification of specific new member issues for addressing with administration
- Association-sponsored professional development opportunities for new members
- Adequate resources available to fund new member participation in TSTA conferences
- Leadership opportunities and training specifically for new members
- Recognition of new members and their accomplishments

# *Building Full Capacity locals*

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## Financial Systems

Accurate and well-maintained financial and membership records are essential components of a well-run organization. A full capacity local has clear and effective provisions for collecting membership information, appropriate record-keeping, accountability, and checks and balances. Such a local has a standing budget committee and a well-trained treasurer who has a clear understanding of the budget process, dues collection and transmittal, applicable tax laws and who clearly communicates this information regularly to the local leadership team. Development and passage of a budget is a yearly activity, and the budget reflects the long-and short-term goals of the local.

The following components are necessary in the development of a full capacity local:

- Keeping accurate membership records
- Knowledge and utilization of the TSTA membership system
- Treasurer training on budget development, compliance with laws, accurate accounting procedures, collection and transmission of dues, how to develop a monthly treasurer's report, etc.
- Yearly local audit/audit committee training
- Development of a system of checks and balances
- Training on how to establish local dues levels and dues increases, etc.

# *Building Full Capacity locals*

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## Governance: Internal and External

For a democratic organization to run efficiently, there are fundamental governance structural requirements that need to be in place. In a full capacity local, these include a regularly updated constitution and bylaws as well as clearly defined roles and responsibilities for leaders, staff and committees, which are communicated to all members. Association meetings are regularly scheduled with established agendas and run according to parliamentary procedure.

The following components are necessary in the development of a full capacity local:

- Knowledge and understanding of the local's constitution and bylaws
- Training on conducting a meeting, developing an agenda and yearly calendar, organizing information
- Specific training on parliamentary procedure
- Established grievance system with training
- An up-to-date handbook for building reps
- Ongoing, relevant building rep training
- Clearly established roles and responsibilities for standing committees
- Training for committee chairs
- Leadership team training
- Regular update of governance documents
- Regular schedule of meetings
- Development of materials to support presidents in their role of scheduling and chairing meetings

# *Building Full Capacity locals*

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## Leadership Development

A knowledgeable, well-trained leadership team is critical in order to meet the needs of members. A full capacity local is led by a group of strong, committed leaders (including elected officers and appointed committee chairs) and TSTA staff who work together to achieve the goals of the local organization. These leaders are well-educated, proactive and responsive to member needs. Key leadership positions are clearly identified and expectations are clear, shared and balanced. The leadership team is diverse and is willing and able to commit adequate time and energy to the goals of the local. The leadership team has a shared vision of the local organization along with a clear mission and a proactive long-range plan as well as short-term goals and priorities.

The following components are necessary in the development of a full capacity local:

- An understanding of leadership styles and leadership responsibilities
- An understanding of TSTA Structure and resources
- Knowledge of TSTA and NEA history
- Mentoring for new leaders
- An understanding of the role and responsibilities of the Area Organizing Staff in assisting and advising the local
- Release time/association days for local leaders
- Opportunities for leaders to meet to share ideas and concerns
- Group training for elected local officers as a “leadership team”
- Special opportunities for training and support for leaders of small locals
- Identifying and developing emerging leaders
- More thorough and updated training in all areas for local leaders
- Diversity training for all leaders
- Leadership participation in TSTA and NEA

# *Building Full Capacity locals*

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## Association Representatives

Knowledgeable, well-trained Association Representatives (AR's) are essential to the growth and development of the local association. In a full-capacity local, AR's are the "face" of the Association in the work site. The AR is often the first exposure to the Association for new employees. AR's are the recruiters, advocates, and communicators at the site level for the Association. Full-capacity locals ensure that all work-sites have AR's who are leaders, well-informed, and well-trained to fulfill the appropriate responsibilities.

The following components are necessary in the development of a full capacity local:

- An understanding of Association Representative responsibilities
- Training for Association Representatives on their responsibilities annually
- Association Representatives recruit new employees in their work-sites
- Association Representatives advocate for the Association and for members
- Association Representatives communicate with members and potential members
- Association Representatives are well-informed
- Association Representatives have a basic understanding of employee rights
- Association Representatives have problem-solving skills



# *Building Full Capacity locals*

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## Political Action/PAC

Every decision that impacts public school employees is made by an elected or appointed government official. In a full capacity local, political action is an ongoing and integral part of the local's long-range plan. There is a continuous commitment to community coalition building including joint ventures with district and community stakeholders. The leadership team and the TSTA staff who work with the local are actively engaged in the political process at the local, state and national levels and assume the responsibility for keeping members accurately and regularly informed on all political issues of importance. The governance structure of the local includes a standing political action committee headed by an active, well-trained chairperson. The local is fully involved in activities such as the TSTA Continuing Contributor PAC drives, local screening and recommending committees, and lobbying. The local leadership team members as well as the building representatives are well-trained to carry out the political goals of the local/state associations at the building level.

The following components are necessary in the development of a full capacity local:

- Local training for the candidate screening and recommending process
- Member awareness of local/state/national issues
- Familiarity and communication with school boards, community and parent groups
- Specific ESP training on political action and PAC
- Clear local screening and recommending guidelines
- Regularly updated PAC materials from TSTA
- PAC training for all building reps
- A leadership team committed to PAC
- Lobbying training for members
- Local involvement in TSTA PAC activities
- Programming to keep members involved in political action year-round
- Support for local coalition building and joint ventures for the local and the district

Enhanced utilization of Web-based means of communicating political information

# *Building Full Capacity locals*

## FULL-CAPACITY PROFILE FOR TSTA LOCAL ASSOCIATIONS

Name of Local \_\_\_\_\_ Region \_\_\_\_\_

School District(s) \_\_\_\_\_

Members, as of \_\_\_\_\_

Active \_\_\_\_\_ ESP \_\_\_\_\_ Life \_\_\_\_\_ Total \_\_\_\_\_

Potential in 05-06:

Market Share:

Teachers \_\_\_\_\_ ESP \_\_\_\_\_ Total \_\_\_\_\_ Teachers \_\_\_\_\_ ESP \_\_\_\_\_ Total \_\_\_\_\_

Compliance: Constitution/Bylaws on file \_\_\_\_\_ Yes \_\_\_\_\_ No

05-06 partial \_\_\_\_\_ full \_\_\_\_\_ 04-05 partial \_\_\_\_\_ full \_\_\_\_\_ 03-04 partial \_\_\_\_\_ full \_\_\_\_\_ 02-03 partial \_\_\_\_\_ full \_\_\_\_\_

Number of Buildings in District \_\_\_\_\_ Local Dues Amount \_\_\_\_\_

ARs:

Number \_\_\_\_\_ Members per AR \_\_\_\_\_

Continuing Contributors:

Number \_\_\_\_\_ Percent of Members \_\_\_\_\_ Total Contributions \_\_\_\_\_ Per memb \_\_\_\_\_

On the following pages you will find a list of local expectations in nine (9) different categories called indicators. In each category, place a checkmark in front of each numbered item that is true of this local. Summarize below.

|                       | Highest<br>Marked | Lowest<br>Unmarked | Total Marked | out of | Total Number |
|-----------------------|-------------------|--------------------|--------------|--------|--------------|
| <b>Advocacy</b>       | _____             | _____              | _____        |        | <u>17</u>    |
| <b>Communications</b> | _____             | _____              | _____        |        | <u>13</u>    |
| <b>Membership</b>     | _____             | _____              | _____        |        | <u>19</u>    |
| <b>Finance</b>        | _____             | _____              | _____        |        | <u>14</u>    |
| <b>Internal Gov</b>   | _____             | _____              | _____        |        | <u>24</u>    |
| <b>External Gov</b>   | _____             | _____              | _____        |        | <u>18</u>    |
| <b>AR</b>             | _____             | _____              | _____        |        | <u>9</u>     |
| <b>LD</b>             | _____             | _____              | _____        |        | <u>13</u>    |
| <b>Pol</b>            | _____             | _____              | _____        |        | <u>15</u>    |

# *Building Full Capacity locals*

## **Indicator 1**

### **Advocacy: Member Representation, Exclusive Consultation**

|  |   |                                                                                                                                                                    |
|--|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | 1 | Members are referred to the Help Center                                                                                                                            |
|  | 2 | Some attempt is made to ensure that members are aware of Help Center unless Local is handling member representation                                                |
|  | 2 | The local president or designee attends some School Board meetings                                                                                                 |
|  | 3 | Someone in the local regularly attends School Board meetings                                                                                                       |
|  | 3 | This local makes annual salary presentations to the School Board                                                                                                   |
|  | 3 | The Local provides representation of some members, working with Help Center, unless Local is handling member representation                                        |
|  | 4 | This local makes presentations to the Board on issues other than salary                                                                                            |
|  | 4 | The president or designee meets occasionally with administration                                                                                                   |
|  | 4 | This local has established a cadre/committee to be trained for representing members (unless Local is handling member representation)                               |
|  | 5 | The president or designee meets regularly with administration                                                                                                      |
|  | 5 | This local has the ability to influence some Board decisions                                                                                                       |
|  | 5 | This local has a trained cadre/committee representing members on most issues, using the Help Center as consultants, unless Local is handling member representation |
|  | 6 | This local handles member representations until a Lawyer is required                                                                                               |
|  | 6 | This local develops and implements plans to lobby/influence Board and administration                                                                               |
|  | 6 | This local has proposed a local consultation policy to the Board                                                                                                   |
|  | 7 | This local has secured an Exclusive Consultation policy in the district                                                                                            |
|  | 7 | This local is recognized as the Exclusive Consultant                                                                                                               |

## *Building Full Capacity locals*

### **Indicator 2**

#### **Communications (Internal and External)**

|  |    |                                                                                                         |
|--|----|---------------------------------------------------------------------------------------------------------|
|  | 2  | This local has at least some communication with members                                                 |
|  | 3  | This local communicates with members occasionally                                                       |
|  | 3= | This local has occasional contact with local media – if only letters to editor                          |
|  | 4  | This local regularly communicates with members                                                          |
|  | 4  | This local has a communications committee to handle the local communications plan                       |
|  | 4  | This local has well developed local media relationships                                                 |
|  | 4  | This local plans and conducts member social functions                                                   |
|  | 5  | This local utilizes email as a communications tool                                                      |
|  | 5  | The local plan includes good internal communications plan and at least rudiments of external media plan |
|  | 6  | This local has the ability to communicate with members and get a response – move members to action      |
|  | 6  | This local engages in Community outreach and involvement                                                |
|  | 6  | The Local plan includes complete external media plan                                                    |
|  | 7  | This local is recognized in the community as a leader in Education                                      |

### **Indicator 3**

#### **Culture of Membership**

|  |    |                                                                                                                        |
|--|----|------------------------------------------------------------------------------------------------------------------------|
|  | 2  | The local distributes TSTA/NEA materials to members                                                                    |
|  | 2= | The local recruits new members at a New-Employee orientation hosted by the district                                    |
|  | 3  | The local recognizes and welcomes new employees to the district                                                        |
|  | 3  | The local directs resources toward membership recruitment                                                              |
|  | 3  | The local has a Membership chair/committee in place                                                                    |
|  | 3  | The local provides an association sponsored professional development opportunity to new members at least once per year |
|  | 3  | The local includes new members on committees                                                                           |
|  | 3  | The local recognizes/thanks members at least once per year                                                             |
|  | 3  | The local recognizes publicly the accomplishments of members                                                           |
|  | 3  | The local ensures that members are aware of the NEA/TSTA Member Benefits opportunities                                 |
|  | 4  | The local communicates with new employees prior to the beginning of the year                                           |
|  | 4  | The local has a complete membership recruitment/retention plan                                                         |
|  | 4  | ARs in this local recruit new members at their work sites                                                              |

## *Building Full Capacity locals*

|  |   |                                                                                   |
|--|---|-----------------------------------------------------------------------------------|
|  | 4 | The local provides materials/packets to all new members                           |
|  | 5 | The local has a process for ensuring that all potential members are asked to join |
|  | 5 | The local provides association member “mentors” for new members                   |
|  | 6 | The local conducts new member orientations for new members                        |
|  | 6 | The local operates in “campaign mode” during either the fall or spring campaign   |
|  | 7 | The local operates in “campaign mode” during both the fall and spring campaigns   |

### **Indicator 4**

#### **Finance, Local dues and Budget**

|  |   |                                                                                     |
|--|---|-------------------------------------------------------------------------------------|
|  | 2 | This local charges local dues                                                       |
|  | 2 | This local operates with a local budget                                             |
|  | 2 | A leader other than person with check book reviews finances in this local           |
|  | 3 | Local dues in this local are above \$10                                             |
|  | 3 | Regular financial statements/Treasurer’s Report are presented to Board              |
|  | 3 | The Budget is reviewed/approved by the Board or other governance body               |
|  | 4 | Local dues are above \$25                                                           |
|  | 4 | The Treasurer attends TSTA Business Center training for Treasurers                  |
|  | 4 | This local’s financial reports are based on the local budget                        |
|  | 5 | Local dues are \$50 or more                                                         |
|  | 5 | The local’s budget is tied to the local plan                                        |
|  | 5 | Financial reports are based on the budget and tied to the local plan                |
|  | 6 | An Audit committee reviews and approves the local’s finances                        |
|  | 6 | Local dues are sufficient to fund the local plan, preferably tied to average salary |

### **Indicator 5**

#### **Internal Governance**

|  |   |                                                                  |
|--|---|------------------------------------------------------------------|
|  | 1 | This local has a President or Contact Person                     |
|  | 1 | This local has a current Constitution or Bylaws                  |
|  | 1 | This local files all Compliance documents occasionally           |
|  | 2 | This local files all Compliance documents at least half the time |
|  | 2 | This local elects officers beyond President or Contact           |
|  | 2 | This local holds some Board or group meetings                    |
|  | 2 | This local makes some attempt to seek input from other members   |

## *Building Full Capacity locals*

|  |   |                                                                                                                                                                                                                                   |
|--|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | 3 | This local's constitution has been updated/reviewed within the last 5 years                                                                                                                                                       |
|  | 3 | This local holds regular Board meetings                                                                                                                                                                                           |
|  | 3 | This local has a regular election of officers with full slate of officers                                                                                                                                                         |
|  | 3 | This local is in full compliance most years                                                                                                                                                                                       |
|  | 3 | This local has a Membership chair/committee in place                                                                                                                                                                              |
|  | 3 | This local seeks diversity (ethnicity and job categories) of involvement in governance                                                                                                                                            |
|  | 3 | Some elements of local planning, including some assessment of member needs exist in this local                                                                                                                                    |
|  | 4 | Leaders in this local have a good understanding of the constitution/by-laws                                                                                                                                                       |
|  | 4 | Leaders in this local understand the responsibilities that accompany their positions                                                                                                                                              |
|  | 4 | This local engages in a planning process, with staff assistance, based on regular assessment of members' needs                                                                                                                    |
|  | 4 | This local has a complete membership recruitment plan                                                                                                                                                                             |
|  | 4 | This local plans and strives for diversity (ethnicity and job categories) in the Governance structure. Job categories means not just ESPs and Actives, but bus drivers, custodians, etc. and librarians, nurses, counselors, etc. |
|  | 4 | This local is in full Compliance every year                                                                                                                                                                                       |
|  | 5 | This local maintains a solid local plan, developed through a process that includes regular assessment of members' needs and staff assistance                                                                                      |
|  | 5 | This local effectively uses committees and or/task forces                                                                                                                                                                         |
|  | 6 | This local ensures and achieves diversity (ethnicity and job categories) in Governance structure                                                                                                                                  |
|  | 6 | This local achieves its goals                                                                                                                                                                                                     |

### **Indicator 6 External Governance**

|  |   |                                                                                 |
|--|---|---------------------------------------------------------------------------------|
|  | 1 | This local attends a Regional BoD at least once a year                          |
|  | 2 | This local sends an occasional Delegate to Regional and/or TSTA HoD             |
|  | 3 | This local regularly attends Regional BoD meetings, training & other activities |
|  | 3 | At least one person from this local attends TSTA Educational Issues Conference  |
|  | 3 | This local elects Delegate(s) to Regional HoD every year                        |
|  | 3 | This local elects Delegate(s) to TSTA HoD every year                            |

## *Building Full Capacity locals*

|  |   |                                                                                                                                |
|--|---|--------------------------------------------------------------------------------------------------------------------------------|
|  | 4 | This local recommends members to the state President for appointment to statewide committees                                   |
|  | 4 | This local hosts an occasional TSTA/NEA training/workshop for local members or attends at regional training/workshop           |
|  | 4 | More than one person from this local attends TSTA Educational Issues Conference                                                |
|  | 4 | This local sends at least one new person each year to at TSTA conference                                                       |
|  | 4 | This local elects a full delegation to Regional HoD and TSTA HoD, most attend                                                  |
|  | 4 | This local elects a Delegate(s) occasionally to NEA RA, if eligible for local delegate(s), or through a Local Cluster          |
|  | 5 | This local hosts at least one TSTA/NEA training/workshop a year for local members                                              |
|  | 5 | This local sends a full delegation to Regional, TSTA HoDs                                                                      |
|  | 5 | This local sends attendees occasionally to NEA Conferences, e.g. Western Region Leadership Conference, National ESP Conference |
|  | 5 | This local elects a full delegation to NEA RA, most attend                                                                     |
|  | 6 | This local sends a full delegation to NEA RA                                                                                   |

### **Indicator 7 AR Structure**

|  |   |                                                                                                                                                                                                                                        |
|--|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | 2 | This local has some ARs, if more than two buildings                                                                                                                                                                                    |
|  | 3 | Depending on number of buildings, this local has enough ARs to warrant AR meetings, some training                                                                                                                                      |
|  | 4 | This local has ARs in half of buildings, some trained, occasional AR meetings                                                                                                                                                          |
|  | 4 | This local recognizes and/or rewards ARs                                                                                                                                                                                               |
|  | 5 | This local has trained ARs in at least half the buildings, regular AR meetings                                                                                                                                                         |
|  | 5 | The local plan includes recruitment, training of ARs, with training offered annually                                                                                                                                                   |
|  | 6 | This local has trained ARs in at least three-fourths of buildings                                                                                                                                                                      |
|  | 6 | The local holds AR training/orientation every year with majority of ARs attending                                                                                                                                                      |
|  | 7 | This local has trained ARs in all buildings, extras at ratio of 1 for 25 members, with appropriate attention paid to including various constituencies – e.g., different job categories of ESPs and non-classroom teacher professionals |

# *Building Full Capacity locals*

## **Indicator 8**

### **Leadership Development/Training**

|  |   |                                                                                                                                                                 |
|--|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | 2 | At least one person occasionally attends TSTA/AOT Leadership Training for leadership skills                                                                     |
|  | 3 | At least one person attends TSTA/AOT Training Conference when offered, others at least occasionally                                                             |
|  | 3 | This local nominates at least one local member for Ambassador Academy                                                                                           |
|  | 4 | More than one person attends TSTA/AOT Leadership Conference when offered                                                                                        |
|  | 4 | This local conducts occasional local leadership training                                                                                                        |
|  | 4 | The local plan includes some element of identifying and involving potential leaders                                                                             |
|  | 5 | Officers and others attend the TSTA/AOT Leadership Training when offered                                                                                        |
|  | 5 | Emerging leaders attend appropriate leadership training yearly, e.g., Ambassador Academy                                                                        |
|  | 5 | The local actively recruits new leaders into active participation in local governance, paying attention to diversity of ethnicity and job category              |
|  | 5 | There is training in the local at least every other year for leaders/potential leaders                                                                          |
|  | 6 | This local hosts at least two TSTA/NEA training workshops a year for local members, either alone or with neighboring locals                                     |
|  | 6 | All officers have been through leadership training                                                                                                              |
|  | 6 | The local plan includes elements to ensure active participation of new leaders in local governance, paying attention to diversity of ethnicity and job category |
|  | 7 | The local conducts a retreat/training/planning session for leaders every year                                                                                   |

## **Indicator 9**

### **Political Involvement**

|  |   |                                                                                                        |
|--|---|--------------------------------------------------------------------------------------------------------|
|  | 2 | At least some members in this local respond to TSTA requests for legislative contact                   |
|  | 3 | At least one member in the local attends some TSTA political/legislative training                      |
|  | 3 | The local has some participants in the legislative interview process                                   |
|  | 4 | The local engages in some School Board election involvement – sponsors forums or meets with candidates |
|  | 4 | Members respond regularly to TSTA requests for Legislative contact and                                 |



## *Building Full Capacity locals*

---

|  |   |                                                                                                                              |
|--|---|------------------------------------------------------------------------------------------------------------------------------|
|  |   | for Legislative Cadre members                                                                                                |
|  | 4 | There is some response to TSTA requests for political involvement/campaigning                                                |
|  | 4 | The local occasionally solicits continuing contributors for TSTA-PAC                                                         |
|  | 5 | The local is regularly represented at TSTA political/legislative training                                                    |
|  | 5 | The local has an established interview process for School Board races, recommendation/endorsement, and does some campaigning |
|  | 5 | There is some local involvement/success in local and legislative elections (beyond response to TSTA efforts)                 |
|  | 5 | The local solicits continuing contributors for TSTA-PAC at least annually                                                    |
|  | 6 | The local plan includes regular solicitation of continuing contributors for TSTA-PAC                                         |
|  | 6 | Local members are involved through the Local in legislative campaigns                                                        |
|  | 6 | The local is fully involved in School Board races/candidates seek support of Local                                           |
|  | 7 | The local identifies, recruits and elects school board candidates                                                            |



## EXERCISE: SKETCH OUT A MEMBER NETWORK

Go back to the workplace map you created. Can you start to see who would make good volunteers and who their assigned contacts would be? Think of the natural leaders, and of people who could be brought along with some training. Consider how to cover all the work groups and social groups.

Make up a first draft of a member-to-member network for your department or workplace. It's only a draft, of course. You will need to do the slow work of getting buy-in from the volunteers, and they will have their own ideas of who they want to stay in touch with.





# TAKING THE CONVERSATION ONLINE

Here are a few ways organizers have used online tools:

## VIRTUAL BREAK ROOM

An email list or Facebook group can be a forum to discuss issues, share information, draw up plans, and make contacts—off the clock and away from the boss.

Cafeteria Workers at the ABC School District communicated through a secret Facebook page when they were discussing sensitive contract negotiation provisions. The online activities complemented an energetic on-the-job campaign that forged "foodidarity" through actions such as sick-outs.

"The Facebook page allowed us to answer questions about unions, address gossip at the zoo, announce organizing meetings, and later to respond to anti-union rumors that crept into the workplace," said Matt Ellison, part of the organizing committee.

## CONNECTING ISOLATED WORKERS

Email and Facebook can allow information-sharing and discussion among people who don't regularly see each other on the job.

Educators at California Virtual Academies, who work from home teaching online classes, used three Facebook groups to communicate during their organizing drive. One group, the "CAVA Water Cooler," offered a place to socialize, share stories, and vent. The second group was for supporters. The third was a private meeting space for the organizing committee to plan.

The 40-person committee also met regularly through a videoconferencing app called Zoom. But the educators met in person several times, too. "Nothing's going to replace actually seeing each other," said member Cara Bryant.

## NETWORKING BETWEEN LOCALS

After teacher locals in a northern corner of Washington state organized one-day strikes against school underfunding, the "Badass Teachers" Facebook page helped the activity go viral. Soon, locals representing half the teachers in the state joined the strike wave.

Bus drivers in a Florida school district who were on the verge of being privatized used Facebook to make contact across other states and to find out how they pressured their districts not to contract with private bus vendors. The bus drivers used this critical information to demonstrate to the district why it was better to keep transportation in-house; the bus drivers were able to keep their jobs.

## RANK-AND-FILE RESISTANCE

Machinists Local 751 member Shannon Ryker started the "Rosie's Machinists 751" Facebook page to rally Boeing workers against mid-contract concessions their International was pushing.

Though the contract narrowly passed, the page became the seed for a new caucus. Union dissidents such as rail workers, auto workers, and carhaulers stay in touch through email lists, conference calls, Facebook groups, and occasional in-person meetings. These methods helped Chrysler workers pull off a 2-to-1 "no" vote on their national contract in 2015, forcing bargainers back to the table to make improvements.





# REMEMBER THE BASICS

As you move through your organizing plan, keep these principles in mind:

## TALK ONE ON ONE

Listen to what your co-workers are saying. Share your own ideas. Don't just gossip or gripe—help create a focus about problems that can be solved.

## ENCOURAGE CONFIDENCE

You and your co-workers may feel scared or hopeless. A calm and confident attitude helps. Remind people what will happen if they do nothing. Help them draw on their righteous indignation instead of their fear.

## CHALLENGE AUTHORITY

Organizers don't need to demonize the boss. We do need to encourage people to question authority and stand up for each other. Figure out how to confront the people in power.

## RECRUIT GOOD LEADERS

Take note of who is naturally respected and encourage them to take on leadership. Look for each person's talents and find ways to use them. Don't let the whiners set the tone.

## IDENTIFY COMMON PROBLEMS AND SHARED HOPES

We organize to bring people together. Talk and listen until you've found a problem that matters to lots of your co-workers. Share what you've heard.

## ORGANIZE DEMOCRATICALLY

Include everyone who is, or might be, affected. Reach out beyond your friends and the people most like yourself. Solicit opinions and involve as many people as possible in decisions. Find a role for everyone.

## SET CONCRETE GOALS

Goals should be specific. State clearly what a victory would be. Make sure the majority of people share this goal.



## GET PEOPLE MOVING

Even simple collective activity is better than just talking. Action breeds commitment. Circulate a petition. Wear buttons. Develop plans that involve small steps. Each step should slowly increase the visibility and strength of the group.

## STICK TOGETHER

As long as an action is collective, you won't leave individuals vulnerable. Design activity that brings people together. Send a group to talk to the boss. Write a letter that everyone signs.

## NO SHORTCUTS

Resist the temptation to do it all yourself, or to shoot out an email and consider your co-workers informed. Even if it seems inefficient at first, getting more people involved is the only way to keep things going over the long run.

## TURN UP THE HEAT

Start with small actions that will probably succeed. With new confidence, people will be inspired to take bigger and riskier steps.

## EVALUATE AS YOU GO

Keep talking one on one and in groups. Assess whether your goals are still correct and clear. Evaluate whether new plans are needed.

## ORGANIZATION IS EVERYTHING

Your organization doesn't need to be too formal, but it does need to get the job done. If you have a phone tree, you're well on your way. Organize social get-togethers, too.

## EYES ON THE PRIZE

Step back, look at the big picture, and don't let setbacks discourage you for long. Remember you're part of a much bigger movement. Pass the torch along to the next generation.



# SECTION 7

## Community Organizing Tools

## **Sample Member Community Organizing Survey**

Members of our Local Association are interested in sponsoring various community services. We know that many of our members are already active in the community and may have ideas about how we can work together with other organizations.

Please take a few minutes to answer these questions. By answering them you are not committed to any action; we are just gathering information.

1. To which community organizations do you belong? (PTA, historical, society, church, ethnic club, women's rights groups, etc.)
  
2. Are you a volunteer for any community organization? Please describe briefly:
  
3. Do you have any special interest that you would want to share with or teach to other members of our Local or to the community? (For example, sign language, CPR, photography, self-defense, etc.)
  
4. Are there special topics that you'd be interested in hearing about at a Local meeting? (For example, alcoholism, financial planning, choosing childcare, etc.)
  
5. Do you have any ideas about ways our Local can work with community organizations you are involved with?

(Please print)

Name: \_\_\_\_\_

Home address: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

(cell) \_\_\_\_\_

Home email: \_\_\_\_\_

## **Sample Checklist for Potential Community Contacts**

\*This list suggests possible contacts and is not meant to be an exhaustive list.

### **1. Unions**

- State Federations
- Central Labor Bodies
- Individual Unions

### **2. Religious Organizations**

- Individual Clergy
- State/Local Council of Churches & Synagogues
- Interfaith Conferences
- Ministerial Associations

### **3. Women's Groups**

- Coalition of Labor Union Women
- National Organization of Women
- Business & Professional Women
- American Association of University Women

### **4. Civil Rights Organizations**

- Coalition of Black Trade Unionists
- NAACP
- Urban League
- Southern Christian Leadership Conference

### **5. Senior Citizens Groups**

- National Council of Senior Citizens
- Association Retirees
- AARP

### **6. Advocacy Groups**

- Consumer Groups
- Citizen Action
- Neighborhood Organizations
- Low-Income Coalitions
- Environmental Groups



# **LIVING WAGE ORGANIZING CAMPAIGN** **MOSCOW, ID**

**NAME** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**TELEPHONE** \_\_\_\_\_ **CELL** \_\_\_\_\_

**EMAIL** \_\_\_\_\_

**JOB CLASSIFICATION** \_\_\_\_\_

**YEARS IN THE COMMUNITY** \_\_\_\_\_

**ORGANIZATIONAL AFFILIATIONS (ie, Book Clubs, Women's Clubs, Brownies, Boy Scouts, Little League, Bowling League, Volunteer work, Sport's Clubs, Extra Curricular Activities, VFW, etc)**

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---



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**HOW MANY RELATIVES/GOOD FRIENDS DO YOU HAVE IN THE COMMUNITY AND IN WHAT ORGANIZATIONS DO THEY PARTICIPATE?**

---



---

**PLACES OF WORSHIP** \_\_\_\_\_

---

**WHAT OTHER CO-WORKERS SHOULD WE TALK TO ABOUT THIS ISSUE?**

---



---

**ISSUES/COMMENTS/SKILLS**

---



---



---

**RATINGS**

- 1) WILL DO ANYTHING FOR THE ISSUE
- 2) SYMPATHETIC
- 3) FENCE STRADDLER
- 4) OPPOSED

**NEA Officers**

Lily Eskelsen García  
*President*

Rebecca “Becky” Pringle  
*Vice President*

Princess R. Moss  
*Secretary-Treasurer*

**NEA Executive Committee**

Eric Brown, *Illinois*

Kevin F. Gilbert, *Mississippi*

Maury Koffman, *Michigan*

Shelly Moore Krajacic, *Wisconsin*

George Sheridan, *California*

Earl Wiman, *Tennessee*

**NEA Executive Director**

John C. Stocks

**The NEA Education Support Professional Quality (ESPQ) department has many additional resources for ESP members. Click on [www.nea.org/esp](http://www.nea.org/esp) for everything NEA offers for ESP careers.**



# Blitz Planning and Organizing Toolkit

## Context/Overview

This toolkit is a resource to use when conducting a field organizing experience. A field organizing experience brings staff, leaders, and members together for relational, issue-based organizing. .

We recommend the following goals for field organizing experiences:

1. Identify issues and concerns at the work site level
2. Membership recruitment, retention, and engagement
3. Leadership team building at worksite level through identification of "natural" leaders
4. Identification of activists or mobilization of members
5. Identification and development of members organizing and leadership skills and abilities

## Example Timeline

### Months Prior to the Field Organizing Experience

**Make a plan** - Begin making your organizing plan and set both qualitative and quantitative goals for this effort. Field Organizing Experiences are most effective when executed in the context of a current organizing campaign. A detailed plan includes: compelling issue(s), goals, timeline, budget, training, benchmarks, and an implementation team.

### 6 – 8 weeks prior to the experience

**Secure data/lists** - At this point you'll also want to start thinking about ways to secure data and lists about your members or potential members. Some locals are able to work with the district to request full staffing lists, others have to work to pull staff lists from individual school websites. In general the more information there is on a given list the better. Information such as phone number, email, zip code, and address are ideal. However, information such as first name, last name, middle initial/name, and worksite can also be helpful. The higher the quality of the data the more useful it'll be during the experience. If you have questions about data, contact your state affiliate.

### 4 weeks prior to the experience

**Build your team** – A successful field experience requires a team of people working together with clear roles and responsibilities. Work with your team to figure out things like: who will schedule the visits, who will prepare the materials, who will communicate with leaders/activists, etc.

Prepare members for being released from duties in order to participate. This can include union release time, requesting substitutes, etc. depending on your contractual rights.

### 2 weeks prior to the experience

**Prepare the experience's schedule** – The schedule should outline general dates, times, and locations important to the blitz. It is always necessary to hold an orientation for participants at the beginning of the

field experience. Other important activities to schedule include daily briefings, any training components, and times to report back to your central location for the daily debrief. You should also create space for celebrating and sharing of learnings throughout the time together for the field experience.

### **1 week prior to the experience**

**Create your field teams and make assignments** - Create field teams of based on size of list, size of worksite, diversity, strengths of team members, and other local considerations. Print out your lists and assign work sites, phone calls, or home visits for each team. As you assign lists, prioritize lists that are most in need of a organizing work.

**Put together packets for field teams-** Double check that your packets have everything that you need to meet your objectives. Do you have membership forms? An engagement piece such as a petition? Lists? A local flyer about your priorities and successes for the year? Talking points for the field teams about key issues?

**The following Pages Provide Example Materials and Resources**

## Example: 1 on 1 Conversation Notes Sheet

Person's Name: \_\_\_\_\_

Work Site: \_\_\_\_\_

Position/Grade Level: \_\_\_\_\_

Person's Home Email: \_\_\_\_\_

### 1. Get to know them: Abilities, Skills or Talents:

|  |
|--|
|  |
|--|

### 2. Finding their issue(s): If you could change one thing about the district/your classroom what would it be? How does that affect you? Your family? Your students? How does that make you feel? Have you tried changing it?

|  |
|--|
|  |
|--|

### 3. Finding solutions to issues and challenges. What is the member willing to do?

|  |
|--|
|  |
|--|

### 4. Leader ID: Who are some other trusted and respected colleagues that would be good to talk to? Why?

|  |
|--|
|  |
|--|

### 5. Other information we should know:

|  |
|--|
|  |
|--|

### Conversation assessment:

1 – Supportive Member Leader w/ Followers

2 – Supportive Member

3 – Persuadable Non-Member

4 – Unsupportive Non-Member

Your Name: \_\_\_\_\_

Date: \_\_\_\_\_

## MEMBER CONVERSATION TRACKING SHEET

(FILL OUT IMMEDIATELY AFTER CONVERSATION)

Member/Potential Member Name: \_\_\_\_\_ Position/Subject: \_\_\_\_\_

Work site: \_\_\_\_\_ Years at this school: \_\_\_\_\_ Years In district: \_\_\_\_\_

---

Top 3 issues:

- 1.
- 2.
- 3.

Who would you say are some of the most trusted and respected staff at your work site? Who do you go to for guidance? Why?

(Aim for 2-4):

- 1.
- 2.
- 3.
- 4.

Any additional notes (optional):

Follow-up Needed:

Organizer Name: \_\_\_\_\_ Date: \_\_\_\_\_

# Site Visit Report Form

Work Site: \_\_\_\_\_

Date: \_\_\_\_\_

Visit Time: \_\_\_\_\_

Building Rep(s): \_\_\_\_\_

Ease of access and receptivity at this site: (choose one):

☐ Very welcoming    ☐ somewhat welcoming    ☐ Difficult

|                                         | # of Certified | # of Classified | Total |
|-----------------------------------------|----------------|-----------------|-------|
| Quality Contacts - Members              |                |                 |       |
| Quality Contacts – Potential Members    |                |                 |       |
| Membership Forms Completed              |                |                 |       |
| Commitment Cards (Or additional action) |                |                 |       |

Potential Leaders Identified:

| Name | Assessment | Notes |
|------|------------|-------|
|      |            |       |
|      |            |       |
|      |            |       |
|      |            |       |

Potential Members for Follow-up:

| Name | Job (grade, department or classification) | Notes |
|------|-------------------------------------------|-------|
|      |                                           |       |
|      |                                           |       |
|      |                                           |       |
|      |                                           |       |

Submitted by: \_\_\_\_\_

Please put additional notes from visit on back of work sheet.

Home Visit Daily Report Form

Field Experience Team: \_\_\_\_\_ Turf: \_\_\_\_\_

Please tally these numbers:

|                |           |                                              |
|----------------|-----------|----------------------------------------------|
| Homes Visited: | Contacts: | Assessments:<br>1's-<br>2's-<br>3's-<br>4's- |
|----------------|-----------|----------------------------------------------|

What quality contacts did you make?

| Name | Local, School, Position | Assessment | Notes (included action taken) |
|------|-------------------------|------------|-------------------------------|
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |
|      |                         |            |                               |

What else should we know from your visits?



## Sample Member Commitment Card

*THIS SCHOOL YEAR, I PLEDGE TO SUPPORT*  
**GREAT PUBLIC SCHOOLS BY:**

- |                                                                                  |                                                                                                              |
|----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Serving as an Association Representative at my worksite | <input type="checkbox"/> Engaging in a community service event                                               |
| <input type="checkbox"/> Attending a school board meeting                        | <input type="checkbox"/> Registering to become an Education Cyber-Lobbyist on state and national legislation |
| <input type="checkbox"/> Helping coordinate a professional development activity  | <input type="checkbox"/> Joining an Association Committee                                                    |
| <input type="checkbox"/> Participating in outreach efforts by contacting members | <input type="checkbox"/> Assisting with planning events                                                      |
| <input type="checkbox"/> Belonging to my professional Association                | <input type="checkbox"/> Other: _____<br>_____<br>_____                                                      |

NAME:

SCHOOL/WORKSITE:

HOME ADDRESS:

CITY/STATE/ZIP:

HOME PHONE:

CELL PHONE:

PERSONAL EMAIL:

## Sample Field Experience Schedule

| Sunday, 7/26                                                                                                                                                                                                                            | Monday, 7/27                                                                                                                                                                                                                                   | Tuesday, 7/28                                                                                                                                                                                                                                  | Wednesday, 7/29                                                                                                                                                                                                                                                                           | Thursday, 7/30                                                                                                                                                                                                                                 | Friday, 7/31                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <p>1PM – Participants arrive. Training begins: Campaign briefing, review week's schedule review, and conversation role-plays, etc.)</p> <p>6PM – Training concludes. Teams given assignments for tomorrow</p> <p>7PM – Group dinner</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> <p>(Depart Thursday night if possible)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> | <p>8AM – Elementary School Site Visits</p> <p>1PM – Final Debrief</p> <p>2PM – Group Photo</p> <p>(Depart Friday afternoon)</p> |

# Checklist and Questions for a Successful Field Experience

## Checklist:

- \_\_\_ The Local Association is on board
- \_\_\_ The State Association is on board, if applicable
- \_\_\_ The dates are confirmed with all stakeholders
- \_\_\_ There is a team of individuals from the local responsible for the overall success of the field experience
- \_\_\_ The experience will help launch or build on an organizing campaign
- \_\_\_ The local's organizing campaign has a compelling issue and message
- \_\_\_ Local staff, leadership, and membership will participate in the experience
- \_\_\_ There is a training plan for teams on organizing conversations, key local issues and collecting data
- \_\_\_ The experience will further identify and develop the local association's worksite leadership
- \_\_\_ We've secured the lists and data needed for members and potential members
- \_\_\_ That data has been uploaded into the VAN or other data tracking tool when and where needed
- \_\_\_ We've secured access to worksites at appropriate dates and times, if applicable
- \_\_\_ We have discussed and secured agreement to include home visits or phone calls, if applicable
- \_\_\_ We have a means to keep track of key metrics (conversations, issues, members engaged, members recruited, leaders identified, etc) per visit so they can be reported daily and entered back into the VAN or other data tracking tool

- \_\_\_ We have created a “to do” list for the experience: for example, gather school or worksite rosters and schedules, building maps, schedules for staff and room assignments; arrange for substitutes, pair teams, and print worksite rosters including list of association reps at each worksite and template for reporting conversations
- \_\_\_ We have determined transportation to worksites and reimbursement for use of personal vehicles
- \_\_\_ We’ve developed a follow up plan at the local level that ensures that the effort of this experience will translate into long-term power building for the local affiliate

### **Questions to consider:**

#### **Participants**

Who will be participating in this experience from the local and state affiliate, if applicable?

Will local leadership participate in teams going out into the field or making phone calls?

Does the local have current activists and/or work site leaders that will be part of the experience?

How many members, UniServ staff and leaders will be needed?

Who is prepping the materials (i.e. conversation note sheets, worksite visit debrief sheets, snacks, flyers, etc.)? Who is training teams?

What specific skills will participants gain or further develop in this field experience?

#### **Data**

What is the data capacity of the local? Do they regularly use the VAN or other data tracking tools?

Who will prepare the lists/data for phone calls, home visits or worksite? Who will enter the daily data from the experience into the VAN or other data tracking programs?

What training/support on data collection and reporting does the local need prior to the experience?

### **Follow Up**

What critical information and data will be collected in order to execute a follow-up campaign (i.e. tracking potential leaders, engaging new members, key issues, etc.)?

How will the local assess the data? How will the follow up plan be implemented? Who will be responsible

## **Daily Debrief of Site or Home Visits or Phone Calls**

### **Example: Debrief Questions**

1. What went well? What didn't? Why?
2. What constraints or barriers did you face?  
How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the work site?
7. How can we do better in the future?

# CAMPAIGN MOUNTAIN

Phases of a Campaign

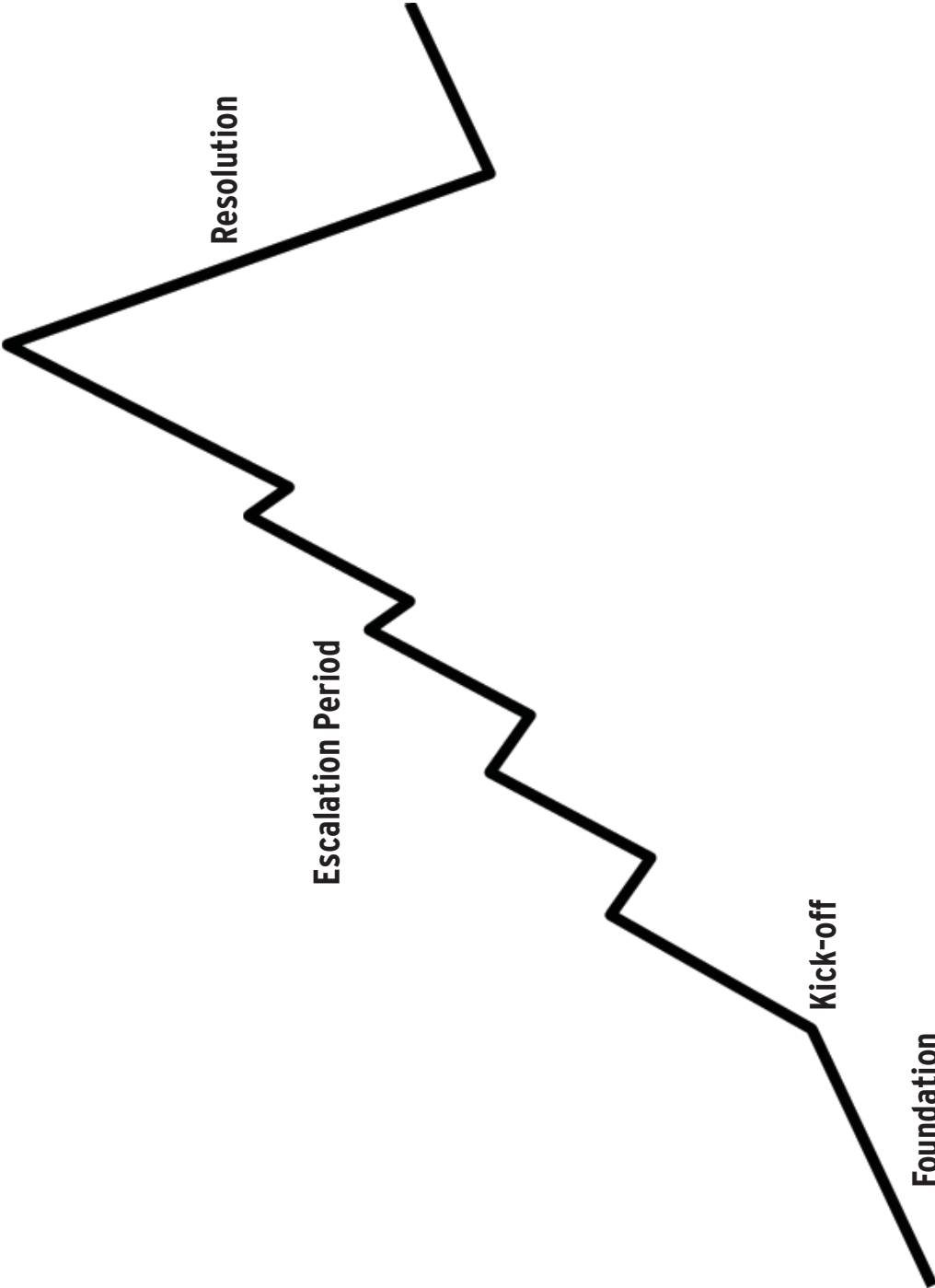
The Peak of Our Strength

Resolution

Escalation Period

Kick-off

Foundation



# MAKE A GAME PLAN

Once you've identified a good organizing issue, you need a plan of action.

## THE THREE BASICS OF A PLAN

- 1. What exactly do you want?** It's amazing how far along folks can be in a campaign without having identified what solution they're after, and whether or not it's winnable.
- 2. Who has the power to fix the problem?** It's not enough to say "management." Figure out which person in management could say yes to your solution.
- 3. Which tactics can work?** Aim your actions to build the pressure on the decision-maker you've identified. Consider how much pressure it will take to win, and where your leverage is.





# CAMPAIGN PLANNING TEMPLATE

| <div>Our Issue</div> <div>What is our deeply and widely felt issue?</div> | <div>Targets</div> <div>Who has the power to fix the problem?</div> | <div>Demands</div> <div>What do we want?<br/>When do we want it?<br/>How will we know we have won it?</div> |
|---------------------------------------------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
|                                                                           |                                                                     |                                                                                                             |

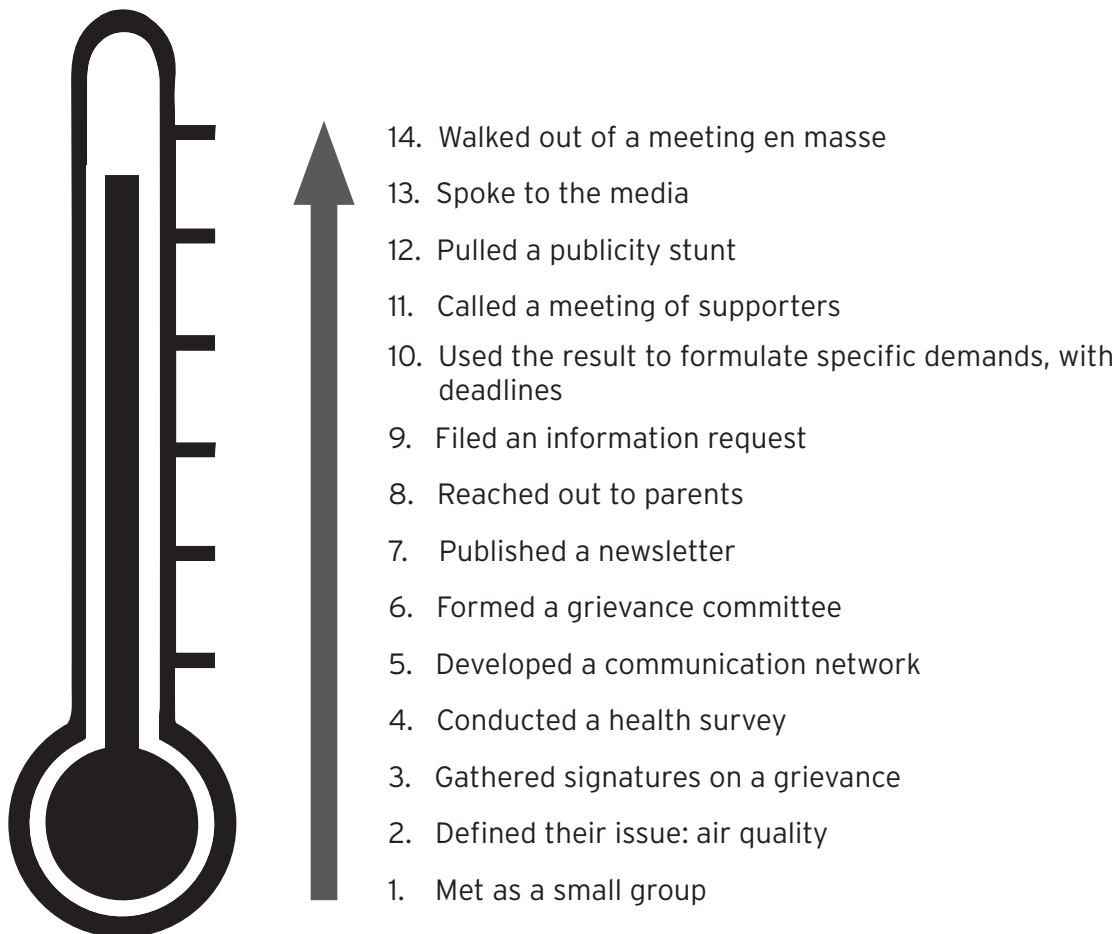




## TURN UP THE HEAT: ACTION THERMOMETER

Don't bring out your big guns right away. Start with an easy activity and get lots of people to participate. If that doesn't succeed, gradually increase the intensity of your actions, but make sure you don't leave people behind by escalating too quickly.

One way to visualize escalating tactics is to arrange them on a thermometer, with each action "hotter" than the last. For instance, here are the steps a group of New Haven teachers took to solve the mold problem at their school, beginning from the bottom of the thermometer:



# 198 METHODS OF NONVIOLENT ACTION



## The Methods of Nonviolent Protest and Persuasion

### Formal Statements

1. Public speeches
2. Letters of opposition or support
3. Declarations by organizations and institutions
4. Signed public statements
5. Declarations of indictment and intention
6. Group or mass petitions

### Communications with a Wider Audience

7. Slogans, caricatures, and symbols
8. Banners, posters, and displayed communications
9. Leaflets, pamphlets, and books
10. Newspapers and journals
11. Records, radio, and television
12. Skywriting and earthwriting

### Group Representations

13. Deputations
14. Mock awards
15. Group lobbying
16. Picketing
17. Mock elections

### Symbolic Public Acts

18. Displays of flags and symbolic colors
19. Wearing of symbols
20. Prayer and worship
21. Delivering symbolic objects
22. Protest disrobings
23. Destruction of own property
24. Symbolic lights
25. Displays of portraits
26. Paint as protest
27. New signs and names
28. Symbolic sounds
29. Symbolic reclamations
30. Rude gestures

### Pressures on Individuals

31. "Haunting" officials
32. Taunting officials
33. Fraternization
34. Vigils

### Drama and Music

35. Humorous skits and pranks
36. Performances of plays and music
37. Singing

### Processions

38. Marches
39. Parades
40. Religious processions
41. Pilgrimages
42. Motorcades

### Honoring the Dead

43. Political mourning
44. Mock funerals
45. Demonstrative funerals
46. Homage at burial places

### Public Assemblies

47. Assemblies of protest or support
48. Protest meetings
49. Camouflaged meetings of protest
50. Teach-ins

### Withdrawal and Renunciation

51. Walk-outs
52. Silence
53. Renouncing honors
54. Turning one's back

## The Methods of Social Noncooperation

### Ostracism of Persons

55. Social boycott
56. Selective social boycott
57. Lysistratic nonaction
58. Excommunication
59. Interdict

### Noncooperation with Social Events, Customs, and Institutions

60. Suspension of social and sports activities
61. Boycott of social affairs
62. Student strike
63. Social disobedience
64. Withdrawal from social institutions

### Withdrawal from the Social System

65. Stay-at-home
66. Total personal noncooperation
67. "Flight" of workers
68. Sanctuary
69. Collective disappearance
70. Protest emigration (hijrat)

## The Methods of Economic Noncooperation: Economic Boycotts

### Actions by Consumers

71. Consumers' boycott
72. Nonconsumption of boycotted goods
73. Policy of austerity
74. Rent withholding
75. Refusal to rent
76. National consumers' boycott
77. International consumers' boycott

### Action by Workers and Producers

78. Workmen's boycott
79. Producers' boycott

### Action by Middlemen

80. Suppliers' and handlers' boycott

### Action by Owners and Management

81. Traders' boycott
82. Refusal to let or sell property
83. Lockout
84. Refusal of industrial assistance
85. Merchants' "general strike"

### Action by Holders of Financial Resources

86. Withdrawal of bank deposits
87. Refusal to pay fees, dues, and assessments
88. Refusal to pay debts or interest
89. Severance of funds and credit
90. Revenue refusal
91. Refusal of a government's money

### Action by Governments

92. Domestic embargo
93. Blacklisting of traders
94. International sellers' embargo
95. International buyers' embargo
96. International trade embargo

## The Methods of Economic Noncooperation: The Strike

### Symbolic Strikes

97. Protest strike
98. Quickie walkout (lightning strike)

### Agricultural Strikes

99. Peasant strike
100. Farm Workers' strike

### **Strikes by Special Groups**

101. Refusal of impressed labor
102. Prisoners' strike
103. Craft strike
104. Professional strike

### **Ordinary Industrial Strikes**

105. Establishment strike
106. Industry strike
107. Sympathetic strike

### **Restricted Strikes**

108. Detailed Strike
109. Bumper strike
110. Slowdown strike
111. Working-to-rule strike
112. Reporting "sick" (sick-in)
113. Strike by resignation
114. Limited strike
115. Selective strike

### **Multi-Industry Strikes**

116. Generalized strike
117. General strike

### **Combination of Strikes and Economic Closures**

118. Hartal
119. Economic shutdown

### **The Methods of Political Noncooperation**

#### **Rejection of Authority**

120. Withholding or withdrawal of allegiance
121. Refusal of public support
122. Literature and speeches advocating resistance

#### **Citizens' Noncooperation with Government**

123. Boycott of legislative bodies
124. Boycott of elections
125. Boycott of government employment and positions
126. Boycott of government depts., agencies, and other bodies
127. Withdrawal from government educational institutions
128. Boycott of government-supported organizations
129. Refusal of assistance to enforcement agents
130. Removal of own signs and placemarks
131. Refusal to accept appointed officials
132. Refusal to dissolve existing institutions

#### **Citizens' Alternatives to Obedience**

133. Reluctant and slow compliance
134. Nonobedience in absence of direct supervision
135. Popular nonobedience
136. Disguised disobedience
137. Refusal of an assemblage or meeting to disperse
138. Sit-down
139. Noncooperation with conscription and deportation
140. Hiding, escape, and false identities
141. Civil disobedience of "illegitimate" laws

#### **Action by Government Personnel**

142. Selective refusal of assistance by government aides
143. Blocking of lines of command and information
144. Stalling and obstruction
145. General administrative noncooperation
146. Judicial noncooperation
147. Deliberate inefficiency and selective noncooperation by enforcement agents
148. Mutiny

#### **Domestic Governmental Action**

149. Quasi-legal evasions and delays
150. Noncooperation by constituent governmental units

#### **International Governmental Action**

151. Changes in diplomatic and other representations
152. Delay and cancellation of diplomatic events
153. Withholding of diplomatic recognition
154. Severance of diplomatic relations
155. Withdrawal from international organizations
156. Refusal of membership in international bodies
157. Expulsion from international organizations

### **The Methods of Nonviolent Intervention**

#### **Psychological Intervention**

158. Self-exposure to the elements
159. The fast
  - a. Fast of moral pressure
  - b. Hunger strike
  - c. Satyagrahic fast
160. Reverse trial
161. Nonviolent harassment

#### **Physical Intervention**

162. Sit-in
163. Stand-in
164. Ride-in
165. Wade-in
166. Mill-in
167. Pray-in
168. Nonviolent raids
169. Nonviolent air raids
170. Nonviolent invasion
171. Nonviolent interjection
172. Nonviolent obstruction
173. Nonviolent occupation

#### **Social Intervention**

174. Establishing new social patterns
175. Overloading of facilities
176. Stall-in
177. Speak-in
178. Guerrilla theater
179. Alternative social institutions
180. Alternative communication system

#### **Economic Intervention**

181. Reverse Strike
182. Stay-in Strike
183. Nonviolent land seizure
184. Defiance of Blockades
185. Politically Motivated Counterfeiting
186. Preclusive Purchasing
187. Seizure of assets
188. Dumping
189. Selective patronage
190. Alternative markets
191. Alternative transportation systems
192. Alternative economic institutions

#### **Political Intervention**

193. Overloading of administrative systems
194. Disclosing identities of secret agents
195. Seeking imprisonment
196. Civil disobedience of "neutral" laws
197. Work-on without collaboration
198. Dual sovereignty and parallel government

Far too often people struggling for democratic rights and justice are not aware of the full range of methods of nonviolent action. Wise strategy, attention to the dynamics of nonviolent struggle, and careful selection of methods can increase a group's chances of success.

Gene Sharp's researched and catalogued these 198 methods and provided a rich selection of historical examples in his seminal work, *The Politics of Nonviolent Action* (3 Vols.) Boston: Porter Sargent, 1973.

Demands - GOALS

TARGET

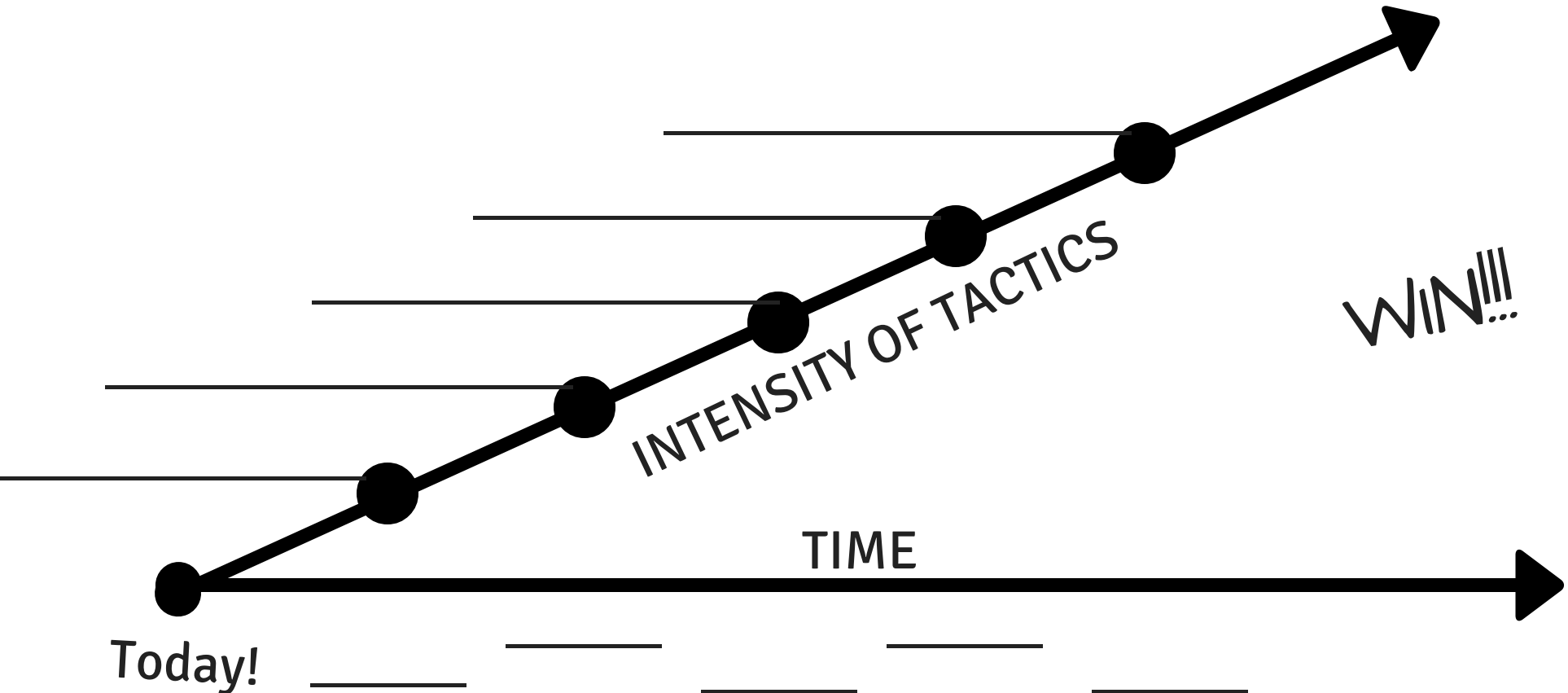
PRESSURE  
POINTS

ALLIES  
ASSETS

Short

Mid

Long



# Resources for Developing a Strong Leadership Structure

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**BUILDING  
STRONG  
LOCALS**

---



Indiana  
State  
Teachers  
Association



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## Let's reflect!

### Building a Foundation

- ☐ Union holds regular meetings for leaders and members.
- ☐ Union has a constitution and bylaws.
- ☐ Every member has access to a copy of the constitution and bylaws.
- ☐ There is a committee structure in place.
- ☐ A few people are doing the work of the union.
- ☐ Members know who their elected officers and representatives are.
- ☐ Union work is primarily transactional.
- ☐ Leaders can identify Union's strengths and areas for improvement.
- ☐ Officers make the majority of decisions for the union.
- ☐ Expectations for every position are defined.
- ☐ Leaders utilize the expertise of the UniServ Director.

### Moving to the Next Level

- ☐ Union holds effective meetings for leaders and members.
- ☐ Leaders have reviewed and updated local constitution and bylaws recently and amends them as needed.
- ☐ There is a leadership succession plan that constantly builds new leaders.
- ☐ Committees are empowered to do the work to which they are assigned.
- ☐ Many people are engaged in the work of the union.
- ☐ There is a robust nomination and election process.
- ☐ The Union has long-term and short-term goals.
- ☐ Major decisions are made with input by members.
- ☐ Expectations for every position are known and adhered to.

### Becoming Aspirational

- ☐ The union reviews local constitution and bylaws yearly.
- ☐ Every member has a role.
- ☐ Union work is primarily transformational.
- ☐ Leaders and members on progress towards goals.
- ☐ Major decisions are made by the members.

You may find your local has foundational strengths, next level strengths, and aspirational strengths but not all strengths listed in a give category. That is okay. Use this reflection to help you work towards building a strong local. Your UniServ Director can help you develop the skills needed to strengthen your leadership structure.



## An Activity for Determining What Kind of Organization We Are

Directions:

1. Cut up the following table so that each bullet is its own slip of paper.
2. Ask each member of the participating group (or divide into smaller groups) if we agree that the statement on the slip of paper reflects our organization. Place the slip of paper into one of two piles: "Yes, that reflects our organization," or "No, that is not like our organization." Remind the participants that the terms "management" and "administration" are interchangeable.
3. Repeat with each slip of paper.
4. Once each slip of paper has been reviewed, count how many slips of each color are in the Yes pile.
5. Reveal and discuss that blue slips represent typical industrial unionism, white represent a professional association, and orange represents a social justice organization.

### Constructing "Progressive Unionism" Out of Three Frames

The "Three Frames" document was developed by the Mooney Institute for Teacher and Union Leadership July, 2005, for use in leadership training. A teaching tool and a work-in-progress, it may be used freely with attribution. Questions: Phone 240-603-6450.

| Industrial Unionism                                                                                                                                                                                                                                                                                                                        | Professional Association                                                                                                                                                                                                                                                                                                                                                                                      | Social Justice Organization                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>"Collective power to meet bread and butter needs and ensure fairness from management"</i>                                                                                                                                                                                                                                               | <i>"Control of the profession to ensure quality"</i>                                                                                                                                                                                                                                                                                                                                                          | <i>"Equity for our students through active engagement in the community"</i>                                                                                                                                                                                                                                                                                                                                      |
| <b>ORIENTATION</b> <ul style="list-style-type: none"> <li>•Emphasizes separation of management and union roles in defining teacher work. "Boards make policy, administrators lead, teachers teach."</li> <li>•The role of the union is to limit what teachers can be asked to do and to increase the pay they get for doing it.</li> </ul> | <b>ORIENTATION</b> <ul style="list-style-type: none"> <li>•Emphasizes building professional learning communities and building the craft and the profession of teaching.</li> <li>•Union promotes and protects high quality teaching as a craft, resists threats to teacher professionalism and asserts teacher leadership. Conflicts between teachers and administrators can become de-emphasized.</li> </ul> | <b>ORIENTATION</b> <ul style="list-style-type: none"> <li>•Emphasizes alliances with parents and the community to organize for social justice to help all children succeed – schools and the conditions around schools must both change to improve educational outcomes.</li> <li>•Race and class challenges and socio-economic segregation must be addressed if achievement gaps are to be narrowed.</li> </ul> |
| <b>VIEW OF MANAGEMENT</b> <ul style="list-style-type: none"> <li>•Assumes labor-management relations are hostile and adversarial. Defends teacher rights &amp; responds to grievances.</li> <li>•Fights for teacher priorities and standard of living in the budget. Organize teachers as an independent force.</li> </ul>                 | <b>VIEW OF MANAGEMENT</b> <ul style="list-style-type: none"> <li>•Values labor-management collaboration and partnership to improve and preserve public education and the profession.</li> <li>•Emphasizes programs and priorities to improve school quality and student achievement in the public interest.</li> </ul>                                                                                        | <b>VIEW OF MANAGEMENT</b> <ul style="list-style-type: none"> <li>•Management and labor are partners in engaging families, community and ethnic groups to build support for public education.</li> <li>•Advocate together for levy referenda, grants, foundation support, and to resist inequitable solutions based on race &amp; class.</li> </ul>                                                               |
| <b>ROLE OF PARENTS</b> <ul style="list-style-type: none"> <li>•Parent outreach when we're in bargaining crisis or labor/mgmt. conflict.</li> <li>•Limit parent intrusions into the classroom to protect teacher autonomy.</li> </ul>                                                                                                       | <b>ROLE OF PARENTS</b> <ul style="list-style-type: none"> <li>•Works with parents to improve individual parent support for their child's learning, but believes professionals have unique expertise.</li> </ul>                                                                                                                                                                                               | <b>ROLE OF PARENTS</b> <ul style="list-style-type: none"> <li>•Reaches out to community allies in strategic alliances to improve the quality of teaching and teacher cultural competency.</li> <li>•Seeks to maximize parent role in improving school effectiveness.</li> </ul>                                                                                                                                  |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>BARGAINING</b></p> <ul style="list-style-type: none"> <li>•Win/lose bargaining;</li> <li>•Limit scope of bargaining to bread and butter issues of salary, hours, and “working conditions.”</li> <li>•Views the teacher contract as way to institutionalize all changes.</li> </ul>                                                                                                                                                                                                                                                                                                                                                       | <p><b>BARGAINING</b></p> <ul style="list-style-type: none"> <li>•Broad scope and interest-based bargaining are a way to address teaching quality and support issues.</li> <li>•Agreements outside contract.</li> <li>•Contracts are a way to codify change once the bugs have been worked out.</li> </ul>                                                                                                                                                                                                                                                                                                                                | <p><b>BARGAINING</b></p> <ul style="list-style-type: none"> <li>•Infuse bargaining with concerns that address race, class, democracy, empowerment and equity issues.</li> <li>•Change can only be institutionalized and sustained by organizing rank-and-file members and the community.</li> </ul>                                                                                                                                                                                                                                                                                                   |
| <p><b>DECISION MAKING</b></p> <p>Management prerogatives respected on a school and district level. Teachers grieve management decisions through their union.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <p><b>DECISION MAKING</b></p> <p>Expands teacher decision-making and instructional leadership at school and district level. Joint decision making expands teacher and union ownership.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                               | <p><b>DECISION MAKING</b></p> <p>Democratic input by all stakeholders creates processes for institutionalized teacher, parent, and student empowerment.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <p><b>TEACHING &amp; THE ACHIEVEMENT GAP</b></p> <ul style="list-style-type: none"> <li>•Teachers have limited ability to control conditions that cause the gap. If students come to school unable or unwilling to learn, or if school conditions aren’t adequate, teachers must not be blamed.</li> <li>•Efforts to close the achievement gap must not be based on unreasonable expectations and the union’s role is to ensure that training and accountability measures don’t contribute to an unsustainable working and learning environment.</li> </ul>                                                                                    | <p><b>TEACHING &amp; THE ACHIEVEMENT GAP</b></p> <ul style="list-style-type: none"> <li>•Quality teaching is critical to closing the achievement gap. It is possible to define and measure quality teaching. The union’s role is to make sure good methods are used, and that tools like “value-added- modeling” are used judiciously and carefully.</li> <li>•Union takes a leadership role in improving the quality of teaching/learning and professional development.</li> </ul>                                                                                                                                                      | <p><b>TEACHING &amp; THE ACHIEVEMENT GAP</b></p> <ul style="list-style-type: none"> <li>•Belief in “effort-based intelligence”--all students can learn if adequate resources are equitably distributed and available.</li> <li>•Cultural competency/proficiency for teachers to reach all students.</li> <li>•School district funding, equitable distribution of accomplished teachers and school resources are priorities.</li> </ul>                                                                                                                                                                |
| <p><b>TEACHING WORKING CONDITONS</b></p> <ul style="list-style-type: none"> <li>•The union works to improve conditions of teaching (Class size, adequate text books and supplies, hours, etc.)</li> <li>•Union emphasizes protection of teachers’ rights – files grievances to resolve conflicts.</li> <li>•Seniority provisions are the best protection against employer favoritism.</li> </ul>                                                                                                                                                                                                                                               | <p><b>TEACHING WORKING CONDITONS</b></p> <ul style="list-style-type: none"> <li>•The union is willing to take control of the improvement of teaching, support for teacher effectiveness, and quality control in the profession.</li> <li>•Alternatives to seniority-based transfer, assignment and layoff procedures are developed by the union to balance needs of younger and older teachers and the program needs of the educational enterprise.</li> </ul>                                                                                                                                                                           | <p><b>TEACHING WORKING CONDITONS</b></p> <ul style="list-style-type: none"> <li>•Assignment of teachers to schools ensures high-quality, experienced teachers in hard-to-staff schools.</li> <li>•The union supports preferential teaching and learning conditions (e.g. lower class sizes) for high poverty schools.</li> <li>•Seniority-based reductions in force will be modified by the union so as not to disproportionately impact high-poverty, high-turnover schools.</li> </ul>                                                                                                              |
| <p><b>CURRICULUM, INSTRUCTION &amp; ASSESSING STUDENT LEARNING</b></p> <ul style="list-style-type: none"> <li>•Primary role of union is to improve wages, benefits, retirement, and equal treatment for all members.</li> <li>•Curriculum, professional development, assessment and grading policy are the responsibility of the district management.</li> <li>•Teachers are responsible for teaching and students are responsible for learning.</li> <li>•Teachers must not be evaluated primarily based on student test scores because that unfairly and inaccurately credits teachers for low performance that has other causes.</li> </ul> | <p><b>CURRICULUM, INSTRUCTION &amp; ASSESSING STUDENT LEARNING</b></p> <ul style="list-style-type: none"> <li>•Union promotes additional responsibility and pay for teacher instructional leaders.</li> <li>•Union brings the teachers’ voice to the design, implementation and evaluation of curriculum, assessment and instruction.</li> <li>•The role of student test scores and other factors in teacher evaluation is negotiated and monitored by the union.</li> <li>•Union accepts necessary role of student achievement/learning in teacher and school accountability, because that is how public schools are judged.</li> </ul> | <p><b>CURRICULUM, INSTRUCTION &amp; ASSESSING STUDENT LEARNING</b></p> <ul style="list-style-type: none"> <li>• Union safeguards teachers’ role in promoting critical thinking, critical pedagogy, and a broad curriculum, not aimed primarily at standardized tests.</li> <li>•Teachers encouraged to make curriculum relevant to students’ lives and to incorporate student’s lives into learning – cultural competence.</li> <li>•Union advocates for a “Broader Bolder Approach” to building a movement to improve the social context for schooling – health care, jobs, housing, etc.</li> </ul> |

# Group Decision Making

## Affinity Diagrams & Pareto Voting

### What Are Affinity Diagrams and Pareto Voting?

Affinity diagrams are a way soliciting input and suggestions from a large group of people that allows each person to be heard and allows the group to see trends. Pareto voting is a technique for prioritizing criteria, determining which of the identified items should be addressed first, and selecting which of the strategies or solutions to implement. It is based on the Pareto principle: approximately 20% of the items brainstormed or developed by the group will be chosen by approximately 80% of the group's participants.

### Group Size

No limit

### When To Use

This technique works best when participants have a good understanding of the concepts and methodology behind the problems being studied, but not much time to determine priorities. The tool can also be used when a visual display of priorities is desirable to promote discussion.

### Materials Needed

- ✓ Chart paper or large sticky notes
- ✓ Sticky notes of regular size
- ✓ Easel or place to hang chart paper
- ✓ Colored markers
- ✓ Self-adhesive half-inch dots

### Instructions for the Facilitator

1. Ask each participant to brainstorm answers to a particular question putting one answer on each sticky note. Examples of questions include:
  - determining the strengths of a Local
  - determining areas of improvement for a Local
  - determining opportunities for member engagement
  - what you love about your job
  - what frustrates you about your job
  - solutions for making the job better
  - top priorities for the Local



2. Have each participant put their sticky note responses on a wall or chalkboard.
3. Ask some members of the group to sort the sticky notes into groups or themes. After a few minutes, ask other members of the group to substitute in for those who begin the sorting. Ask the final group of sorters to write category names for each groups or theme on a larger sticky note or chart paper.



4. Present the list of categories, making sure that all categories are clearly stated and understood.
5. Multiply the total number of categories by 0.20. Round up the result of this calculation to the next whole number. This will be the number of times each participant may vote for the highest priority category. For example, if the team brainstormed 10 ideas, because  $10 \times 0.20 = 2$ , each participant gets two votes.
6. Briefly discuss what criteria should be considered in determining the highest priority or have participants brainstorm to generate a possible list of criteria they can vote on. This may include which categories are the most urgent, which are the easiest to address, which the participant cares about most, etc.
7. Have participants vote by placing self-adhesive dots on the chart paper or large sticky notes next to those categories that represent their personal choices. (Participants may elect to use their votes either by placing all of their dots on the same category, splitting them based upon their personal priorities, or using only one vote per item. This decision should be made by the facilitator and group ahead of time.)
8. The options that receive the most votes from the group are those most likely to have the greatest support.
9. You can now use this data for a variety of purposes including:
  - Setting 1-year, 2-year, and 3-year goals
  - Share with administration if results include climate issues
  - Develop high-priority discussion topics









# What Is Our Structure?

## Analyzing Your Local's Structures

Directions:

1. Make a list or draw the current structure of the Local
2. Ask the following questions:
  - a. What's working?
  - b. What's not working?
  - c. What's not getting done?
  - d. What's missing?
  - e. Does our structure match our goals and priorities?
3. Suggest possible changes to the structure of the Local.
4. Amend the Local constitution and bylaws to reflect the changes.

### Examples of Local Structure

*Note: Local names have been changed.*

#### Fountain Park Education Association

**All positions are elected. Has an Executive Board whose positions are in red.**

|                                                                                             |                                                                                             |
|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>President</b>                                                                            | Sick Leave Bank Committee (1 per building)                                                  |
| <b>Vice President</b>                                                                       | Evaluation Committee (1 for every 10 members in a building, committee elects <b>chair</b> ) |
| <b>Secretary</b>                                                                            | Insurance Trust Representative                                                              |
| <b>Treasurer</b>                                                                            | Local Political Action Committee Representative                                             |
| <b>Building Representatives</b> (1 for every 10 members in a building)                      | District Council Representative(s)                                                          |
| Membership Committee (1 for every 12 members in a building, committee elects <b>chair</b> ) | Delegates to the ISTA Representative Assembly                                               |
| Bargaining Committee (1 for every 10 members in a building, committee elects <b>chair</b> ) | Investment Committee Representative (2)                                                     |
| Discussion Committee (1 for every 10 members in a building, committee elects <b>chair</b> ) |                                                                                             |

#### Monterey Teachers Union

**All positions are elected. Has a Leadership Team whose positions are in red.**

|                                     |                                                             |
|-------------------------------------|-------------------------------------------------------------|
| <b>President/Co-Presidents</b>      | Discussion Committee (1 for every 10 members in a building) |
| <b>Vice President of Bargaining</b> | Sick Leave Bank Committee (3 members)                       |
| <b>Vice President of Discussion</b> | Insurance Trust Delegate                                    |
| <b>Vice President of Membership</b> | District Council Delegate(s)                                |
| <b>Secretary</b>                    |                                                             |
| <b>Treasurer</b>                    |                                                             |



Association Reps (1 for every 10 members in a building)  
Bargaining Team (1 for every 10 members in a building)

ISTA Representative Assembly Delegate(s)  
Local Political Action Committee Delegate(s)

### **Tefft Education Association**

*All positions are elected. Has an Executive Board.*

President/Co-Presidents  
1st Vice President of Grievance  
2nd Vice President of Membership & Political Action  
Recording Secretary  
Corresponding Secretary  
Treasurer  
Association Representatives (1 for every 12 members in a building)  
District Council Delegates  
Delegates to the ISTA Representative Assembly  
Delegate(s) to NEA Representative Assembly  
Bargaining Team (1 for every 12 members in a building)  
Discussion Team (1 for every 12 members in a building)

Insurance Committee (1 for every 12 members in a building)  
Evaluation Committee (1 for every 12 members in a building, committee elects chair)  
Technology Committee (1 for every 12 members in a building, committee elects chair)  
Curriculum Committee (1 for every 12 members in a building, committee elects chair)  
Grievance Committee (1 for every 12 members in a building, committee elects chair)  
VEBA Committee (1 for every 12 members in a building, committee elects chair)

### **Yeoman Classroom Teachers Organization**

*All positions are elected. Has a Leadership Team.*

President/Co-Presidents  
Vice President of Member Representation  
Vice President of Membership  
Vice President of Bargaining  
Vice President of Discussion  
Vice President of Scholarship Fund  
Vice President of Sick Leave Bank  
Vice President of Evaluation  
Secretary  
Treasurer  
Building Representatives (1 for every 10 members in a building, no less than 2)  
Membership Committee (1 for every 10 members in a building, no less than 2)  
Bargaining Committee (1 for every 10 members in a building, no less than 2)

Scholarship Committee (1 for every 10 members in a building, no less than 2)  
Sick Leave Bank Committee (1 for every 10 members in a building, no less than 2)  
Evaluation Committee (1 for every 10 members in a building, no less than 2)  
Discussion Committee (1 for every 10 members in a building, no less than 2)  
Insurance Trust Representative  
Local Political Action Committee Delegate  
District Council Delegates  
Delegates to the ISTA Representative Assembly  
Delegate(s) to NEA Representative Assembly





# Who Does What?

## Our Union Tasks and Responsibilities

Directions: Divide into small groups. For each task listed below, your group should mark the union role you think is responsible for the task. Then have each of the small groups share and decide as a large group which positions should be responsible for which tasks. Then make a document that clearly defines which of these tasks went to which role. You may want to also consider amending the union's constitution and bylaws to reflect these changes.

Who will . . .

1. preside at all meetings of the Local Association and the Executive Board/Leadership Team
2. be an ex-officio member of all committees
3. assume all duties of the president in case of absence, resignation, or death
4. coordinate training for building representatives on representing members when needed
5. assist building representatives when representing members when necessary and coordinate with the Local President on member representation issues when necessary
6. keep minutes of all meetings of the Local Association and the Executive Board/Leadership Team
7. notify members in advance of all Local Association and Executive Board/Leadership Team meetings
8. send emails to members on behalf of officers when requested
9. maintain the hard copy and digital files of the Local Association
10. provide to members a summary or minutes of Executive Board/Leadership Team meetings
11. have charge of all funds of the Local Association
12. maintain Association funds in a bank in the name of the Local Association with a/the President as a co-signer on the account
13. disburse funds as authorized by a vote the Executive Board/Leadership Team
14. be in charge of all ongoing membership campaigns
15. develop a budget for approval by the Executive Board/Leadership Team
16. maintain a current list of members and non-members
17. report current membership at each Executive Board/Leadership Team Meeting and to ISTA
18. coordinate training for bargaining team members when necessary
19. maintain communication with the superintendent about bargaining
20. call and coordinate meetings of the bargaining team
21. ensure communication between the bargaining team and members
22. organize the ratification meeting
23. coordinate training for discussion team members when necessary
24. maintain communication with the superintendent about discussion
25. call and coordinate meetings of the discussion committee
26. ensure communication between the discussion committee and members
27. perform building discussion with the building administrators
28. collect requests to the sick leave bank
29. organize meetings of the sick leave bank committee
30. communicate the decisions of the sick leave bank committee to appropriate parties
31. solicit feedback on the evaluation model
32. coordinate meetings of those working on the evaluation



33. communicate decision of those working on the evaluation to the Executive Board/Leadership Team and members
34. attend meetings of the insurance trust
35. communicate insurance trust decisions with Executive Board/Leadership Team and members as applicable
36. attend meetings of the area local political action committee
37. communicate decision of the local political action committee with the Executive Board/Leadership Team and members as applicable
38. represent Local Association at District Council meetings and report back from those meetings to the members
39. attend the one-day ISTA Representative Assembly, vote on matters before the assembly on behalf of Association Members, and report back information from the Representative Assembly to members
40. be responsible for representing members in meetings with administrators
41. assist members with inaccurate evaluations
42. collect applications for the Association scholarship
43. organize scholarship committee meetings to determine scholarship winners
44. organize someone to present the scholarship at Awards Night
45. ensure scholarship funds are distributed to recipients
46. compile & distribute the Association newsletter
47. answer a question or concern about salary and/or benefits
48. answer a question or concern about the evaluation tool
49. respond to requests to change the evaluation tool
50. file a grievance on behalf of a member
51. decide if a grievance should go to arbitration
52. notify members about how to donate to the Sick Leave Bank
53. solicit topics for district-wide Discussion
54. solicit topics for building Discussion
55. talk to nonmembers about joining the Association
56. solicit ideas/suggestions for bargaining

## Sample Result of Who Does What Activity

**President:** shall preside at all meetings of the TLCTO and the Leadership Team and shall be an ex-officio member of all committees.

**Vice President of Member Representation:** shall assume all duties of the president in case of absence, resignation, or death, coordinate training for building representatives on representing members when necessary, assist building representatives when representing members when necessary, and coordinate with the President on member representation issues when necessary.

**Vice President of Membership:** shall be in charge of all on-going membership campaigns, maintain a current list of members and non-members, maintain a current email list of members, and report current membership numbers at each meeting of the Leadership Team.

**Vice President of Bargaining:** shall coordinate training for bargaining team members when necessary, maintain communication with the superintendent about bargaining, call and coordinate meetings of the bargaining team, ensure communication between the bargaining team and members, and organize the ratification meeting.

**Vice President of Discussion:** shall coordinate training for discussion team members when necessary, maintain communication with the superintendent about discussion, call and coordinate meetings of the discussion team, and ensure communication between the discussion team and members.

**Vice President of Scholarship Fund:** shall collect applications for the TLCTO scholarship, organize scholarship committee meetings to determine scholarship winners, organize someone to present the scholarship at Awards Night, and ensure scholarship funds are distributed to recipients.

**Vice President of Sick Leave Bank:** shall collect requests to the sick leave bank, organize meetings of the sick leave bank committee, and communicate the decisions of the sick leave bank committee to appropriate parties.

**Vice President of Evaluation:** shall solicit feedback on the evaluation model, coordinate meetings of the evaluation committee, and communicate decision of the committee to the Leadership Team and members.

**Secretary:** shall keep minutes of all meetings of the TLCTO and the Leadership Team, shall notify the President if any elected member of the Leadership Team resigns or forfeits their membership on the Leadership Team, shall notify members in advance of all TLCTO and Leadership Team meetings, shall send emails to members on behalf of other officers when requested, shall provide to members a short summary of Leadership Team meetings, and shall maintain the hard copy and digital files of the TLCTO.

**Treasurer:** shall have charge of all funds of the TLCTO, shall maintain them in a bank in the name of the organization with the President as a co-signer on the account, and shall disburse funds as authorized by a vote the Leadership Team, and shall develop a budget for approval by the Leadership Team and provide account balances at each meeting of the Leadership Team.

**District Council Delegates:** shall represent TLCTO at District Council meetings and report back from those meetings to the members.

**Delegates to the ISTA Representative Assembly:** shall attend the one-day ISTA Representative Assembly, vote on matters before the assembly on behalf of members, and report back information from the Representative Assembly to the members.

**Building Representatives:** shall be responsible for representing members in meetings with their principals and shall assist with membership.

**Committee Members:** shall be responsible for scheduling and attending meetings and relaying information back to the Leadership Team.



# Who Do I Talk To?

## Guiding Members to the Correct Union Leader

Directions: As an executive board/leadership team, decide to which union leader a member should speak to about the topics on the left. Then update the chart with those leaders. Be sure to also share with members a list of who is currently filling which role in your union and a list of the mandatory subjects of Discussion. Print the final copy on 8.5"x14" paper and distribute to members.

|                                                                                                | Start with . . .                                    | If it doesn't get resolved, next go to . . . | Finally, if it's still not resolved, go to . . . |
|------------------------------------------------------------------------------------------------|-----------------------------------------------------|----------------------------------------------|--------------------------------------------------|
| <b>I have a question or concern about salary and/or benefits.</b>                              | A bargaining team member in your building           | Your association rep/building rep            | The Local President                              |
| <b>I have a question or concern about the evaluation tool.</b>                                 | An evaluation team member in your building          | Your association rep/building rep            | The Local President                              |
| <b>My evaluation is inaccurate.</b>                                                            | An evaluation team member in your building          | Your association rep/building rep            | The Local President                              |
| <b>I would like to get our evaluation tool changed.</b>                                        | An evaluation team member in your building          | Your association rep/building rep            | The Local President                              |
| <b>I need representation/assistance in a meeting with administration/school board.</b>         | Your association rep/building rep                   | The Vice-President of Member Representation  | The Local President                              |
| <b>I would like to apply to use or have a question about the Sick Leave Bank.</b>              | A Sick Leave Bank Committee member in your building | The Vice-President of the Sick Leave Bank    | The Local President                              |
| <b>I have a question or concern related to one of the attached mandatory discussion items.</b> | A Discussion team member in your building           | The Vice-President of Discussion             | The Local President                              |
| <b>I have a great idea for our union.</b>                                                      | Your association rep/building rep                   | The Local Vice-President                     | The Local President                              |
| <b>I need a membership form for someone.</b>                                                   | A Membership Committee member in your building      | The Vice-President of Membership             | The UniServ Assistant                            |
| <b>I need to change my dues payment method.</b>                                                | Call 844.ASK.ISTA or email askista@ista-in.org      |                                              |                                                  |



|                                                                                          |                                                 |                                    |                                                                          |
|------------------------------------------------------------------------------------------|-------------------------------------------------|------------------------------------|--------------------------------------------------------------------------|
| <b>I would like something negotiated into a future contract.</b>                         | A bargaining team member in your building       | The Vice-President of Bargaining   | The Local President                                                      |
| <b>I have been accused of child abuse by a student or parent.</b>                        | Immediately contact your Local President        |                                    |                                                                          |
| <b>I would like information about our local union's scholarship fund.</b>                | A Scholarship Committee member in your building | The Vice-President of Scholarship  | The Local President                                                      |
| <b>I would like to know more about what is going on at the state and national level.</b> | Our District Council Delegate                   | Our ISTA Board of Directors Member | The ISTA President                                                       |
| <b>I would like to change an aspect of our state union.</b>                              | Our District Council Delegate                   | Our ISTA Board of Directors Member | The ISTA President or bring a motion to the ISTA Representative Assembly |
| <b>I would like to change an aspect of our national union.</b>                           | ISTA's members on the NEA Board of Directors    | The NEA President                  | Bring a motion to the ISTA Representative Assembly                       |



# All-Committee Organizational Meeting

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## Give Our Committees a Kick-start

Directions: Gather each of the union committees in one place but with separate meeting spaces (like neighboring classrooms) and have them complete the following tasks.

### Objectives for the Next Hour

1. Elect a committee chair
2. Elect a committee secretary
3. Come up with a list of priorities for the rest of the year including determining if training is needed
4. Have committee chair email appropriate administrator to see if they can meet with the committee on X date.

Committee \_\_\_\_\_

Committee Chair \_\_\_\_\_

Committee Secretary \_\_\_\_\_

Our priorities for the rest of the year:

Possible meeting dates we're sending to administration \_\_\_\_\_



# Constitution & Bylaws Checklist

## Making Sure the Constitution & Bylaws Meets Our Needs

Directions: As an executive board/leadership team or in small groups, compare this checklist to your Constitution & Bylaws. Check the items that the group decides to be add or change and note what they should now say.

Local Association: \_\_\_\_\_

|                                                                                                                             | We need to add/change this | Comments |
|-----------------------------------------------------------------------------------------------------------------------------|----------------------------|----------|
| What is the name of the Association?                                                                                        |                            |          |
| What is the Association's purpose?                                                                                          |                            |          |
| Who can be a member?                                                                                                        |                            |          |
| Do we have honorary/reserved membership? If so, how does one become that?                                                   |                            |          |
| What are members' rights?                                                                                                   |                            |          |
| When is a member considered "in good standing"?                                                                             |                            |          |
| When will someone's membership be cancelled?                                                                                |                            |          |
| When and by what means can a member cancel their own membership?                                                            |                            |          |
| Can membership be denied to any member for discriminatory reasons?                                                          |                            |          |
| Is there a guarantee of due process for those who are censured, suspended or expelled from the Association?                 |                            |          |
| Who has voting privileges?                                                                                                  |                            |          |
| When is a membership year?                                                                                                  |                            |          |
| What officers does your Local have?                                                                                         |                            |          |
| How are ballot nominations handled?                                                                                         |                            |          |
| When are elections?                                                                                                         |                            |          |
| Is there a description of the responsibilities of each officer?                                                             |                            |          |
| What happens if a vacancy occurs outside of the election cycle?                                                             |                            |          |
| Who presides at meetings?                                                                                                   |                            |          |
| What do you call your group of officers and possibly others (Board? Executive Board? Leadership Team?) and who is included? |                            |          |

|                                                                                                                           |  |  |
|---------------------------------------------------------------------------------------------------------------------------|--|--|
| How are members who serve in committee positions determined?                                                              |  |  |
| Is there a break-down of numbers of committee positions (a ratio of 1 representative for every 15 members in a building)? |  |  |
| Does it allow for or mandate Co-Presidents or can you only have one President?                                            |  |  |
| What are the duties of the President(s)?                                                                                  |  |  |
| Is the President(s) an ex-officio member of all committees and if so, is it a voting or non-voting membership?            |  |  |
| What are the duties of any Vice-Presidents?                                                                               |  |  |
| What are the duties of any Secretaries?                                                                                   |  |  |
| What are the duties of any Treasurers?                                                                                    |  |  |
| Who keeps the minutes at meetings?                                                                                        |  |  |
| Are the minutes distributed, on what timeline, and to whom?                                                               |  |  |
| Where are Association documents stored?                                                                                   |  |  |
| How are bills paid and is there an approval process?                                                                      |  |  |
| Who and how many people sign the checks?                                                                                  |  |  |
| How is the District Council delegate(s) determined?                                                                       |  |  |
| Does the Association have a budget and if so, who develops and approves it?                                               |  |  |
| What happens when an officer is negligent or excessively absent from duties?                                              |  |  |
| What are the term lengths of each officer and if more than one year, which years do elections occur for each position?    |  |  |
| Is the list of candidates announced before the election?                                                                  |  |  |
| Are candidates allowed to send out statements or campaign before the election?                                            |  |  |
| Shall elections be done by secret ballot?                                                                                 |  |  |
| Are absentee ballots allowed and if so, by what means?                                                                    |  |  |
| How is ballot counting done?                                                                                              |  |  |

|                                                                                                                                            |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| How is a win determined (one more vote than the opponent(s) versus a majority of votes versus a majority of members)?                      |  |  |
| What happens in the event of a tie?                                                                                                        |  |  |
| When shall those elected assume their duties following an election?                                                                        |  |  |
| How are Association Representative determined such as elected or appointed?                                                                |  |  |
| What are the duties of an Association Representative?                                                                                      |  |  |
| How are Membership Committee members appointed/elected?                                                                                    |  |  |
| How are Bargaining Team members appointed/elected?                                                                                         |  |  |
| What authority does the Bargaining Team have?                                                                                              |  |  |
| How are Discussion Team members appointed/elected?                                                                                         |  |  |
| How are Building Discussion Team members appointed/elected?                                                                                |  |  |
| How are Grievance Committee members appointed/elected?                                                                                     |  |  |
| How are Sick Bank Committee members appointed/elected?                                                                                     |  |  |
| What other standing committees exist that are solely Association members, how are committee members determined, and what are their duties? |  |  |
| How are Ad-Hoc committees established and members appointed/elected?                                                                       |  |  |
| How are committee chairs appointed/elected?                                                                                                |  |  |
| Are committee chairs to attend executive committee meetings?                                                                               |  |  |
| What is the length of committee members' terms and when do they begin?                                                                     |  |  |
| What happens in the event of a committee vacancy?                                                                                          |  |  |
| How are delegates to the ISTA Representative Assembly chosen?                                                                              |  |  |
| How are delegates to the NEA Representative Assembly chosen?                                                                               |  |  |
| Are the financial documents of the Association audited and if so, how does this process work?                                              |  |  |

|                                                                                                     |  |  |
|-----------------------------------------------------------------------------------------------------|--|--|
| Is affiliation with ISTA and NEA listed?                                                            |  |  |
| How does one change the Constitution and Bylaws?                                                    |  |  |
| What happens to Association assets if the Association dissolves?                                    |  |  |
| How shall meetings be conducted, for example using Robert's Rules of Order?                         |  |  |
| What is a quorum such as is it a percentage of members or a percentage of members present?          |  |  |
| How is the Collective Bargaining Agreement ratified?                                                |  |  |
| Is the ratification done by secret ballot?                                                          |  |  |
| Does the ratification require a quorum?                                                             |  |  |
| When are General Membership meetings held and how often?                                            |  |  |
| How are local dues changed?                                                                         |  |  |
| Is there a provision encouraging minority involvement or establishing a minority affairs committee? |  |  |

Other items for consideration . . .

# Essential Local Financial Procedures

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Local leaders can use the following four focus areas to quickly and easily to strengthen the financial health of our Association. These areas are the easiest and most effective ways to prevent and detect issues.

## 1. Ensure that appropriate people have access to bank and financial accounts.

Know who the authorized signers are on the local bank and financial accounts and review them regularly. Change signers immediately when new people become local leaders. At least two local officers must have local account access.

## 2. Complete bank reconciliations monthly. Have them reviewed and signed by someone other than the person completing the reconciliation.

A basic bank reconciliation identifies the differences between the checkbook/ledger balance and the bank account balance. It calls out any outstanding transactions and reconciling items (differences or discrepancies). A simple report is generated, and the actual bank statement should be attached.

After completing this process, give the reconciliation packet to another person in the local to review and sign. The second person should review the reconciliation and look specifically at the transactions on the bank statement. This review process should be completed as soon as possible after the reconciliation is prepared each month. Keep the signed/initialed copy with the local's financial records for seven years, the document retention time for these financial records.

To make this financial control even stronger, have someone other than the person reconciling the bank accounts receive, open and review bank statements. This can be achieved by having the bank mail statements to this person or by granting them online access to bank accounts.

## 3. Have tight controls over disbursements of local money.

- No debit cards.
- No cash withdrawals.
- Require detailed receipts or other documentation for all transactions.
- Disbursements should only be made for Association business. All disbursements made should fit within the local's guidelines and budget. If they do not, then specific approval from the local's governing board should be obtained prior to making the disbursement.
- Have a voucher system for payments. Vouchers should be approved by at least one officer. At no time should a voucher be approved by the person being paid. For each expense, the voucher should answer the **five W's**:



- **Who** was the purchaser/who was there?
- **What** was purchased (detailed receipt).
- **When** was the purchase made/expense incurred?
- **Where** was the purchase?
- **Why** was it purchased (the business purpose)?

Two signers on checks is preferable. Locals with strong voucher systems in place, where approval is clear prior to disbursements being made, can require only one signer on checks. Checks should always be signed by someone other than the person being paid.

If it is necessary to have an Association credit card, tight controls on how the card is used must be in place. When possible, advanced approval for purchases should be obtained. Only use the card when there are no other viable options for payment.

#### **4. Have a budget each year. Present financial reports at each local business meeting.**

An annual budget is the plan for how local resources will be used to carry out the goals and work of the Association annually. A budget can be very simple or more complex depending on the size and needs of the local.

In addition to a budget, regular financial reports serve to share the financial status of the local and to demonstrate accountability in the managing of resources. As with a budget, financial reports can be simple or more complex depending on the size and needs of the local.

At a minimum, a financial report should show all resources of the local (cash, investments, other property, etc.) and any liabilities/debts, if applicable. The report should also compare the budget to all revenue the local has received (dues income, interest, etc.) and any expenses incurred to date.

#### **ISTA Resources**

Take advantage of ISTA's financial resource documents to assist in your planning. At [ista-in.org/resources](http://ista-in.org/resources) under "Local Treasurers" you can find several example documents including:

- A sample local budget and financial statement template
- A sample voucher located in the Local Treasurers Handbook and in the financial statement template
- A sample bank reconciliation

For additional assistance, please contact ISTA Treasurer.

# What Kind of Union Do You Want to Be?

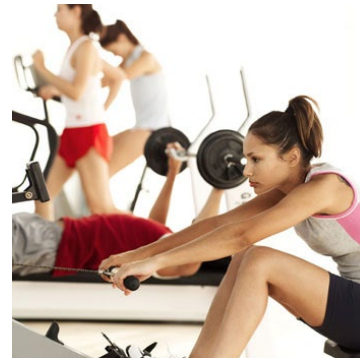
## Transactional or Transformational?



### Transactional?

Members pay dues in order to get desired service.

*Responsive, self-interested, status quo, concentrated power, efficient, solve problems.*



### Transformational?

Members pay dues in order to participate and affect change.

*Proactive, group interests, change, diffuse power, messy, create revolutions.*

Where we were a year ago?



Where we are today?



Where we want to be in a year (be realistic)?





## Moving towards Transformational

| <b>Transactional</b>                                                                                                                                                                                                               | <b>Your Local Assessment</b><br> | <b>Transformational</b>                                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reluctant to involve members in bringing pressure on the employer. Members have not built power. Union organization at the worksite is weak. Management takes advantage of this lack of unity and loss of confidence in the union. | <b>1      2      3      4</b>                                                                                     | Encourages initiative and creativity of members. Members are empowered and the union is better organized at the worksite. The more collective understanding and action, the more change is institutionalized and sustained.               |
| Limits the scope of bargaining to team developed issues or individual issues. Does not utilize the power of discussion to have persuasive conversations on the working conditions impacting members.                               | <b>1      2      3      4</b>                                                                                     | Infuses bargaining with concerns from whole membership. Uses broader issues of working conditions to drive discussion.                                                                                                                    |
| Exclusive. Little turnover in leadership. Suspicious of newcomers. Small group of leaders handpicks participants.                                                                                                                  | <b>1      2      3      4</b>                                                                                     | Inclusive. Tries to reflect the workforce in the composition of union leadership. Democratic input by all stakeholders creates processes for institutionalized teacher, parent, and student empowerment.                                  |
| Member expects president or rep to fix their problem. President or rep talks to the administration alone and settles issues without members present.                                                                               | <b>1      2      3      4</b>                                                                                     | Member understands their responsibility to be part of the solution, asking what we can do to solve the problem. Organizer talks to other members about how the issue affects us all and members have a united message for administration. |
| Bargaining kept within small team. No bargaining support committee. Negotiations are kept secret until a settlement is reached.                                                                                                    | <b>1      2      3      4</b>                                                                                     | Bargaining team works with bargaining support committee to build consensus. A transparent model for negotiations to maintain a constant flow of information to members.                                                                   |

# Leadership in the Age of Complexity

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## From Hero to Host

Directions: Have the group (Leadership Team, Executive Board, reps, members, etc.) read the following article. Then have them rank their Local on a continuum of hero to host. Additionally, have each individual rank themselves on the hero to host continuum. Finally facilitate a discussion about what needs to change or to be done differently and what next steps can be taken.

Margaret Wheatley with Debbie Frieze ©2010 published in Resurgence Magazine, Winter 2011

For too long, too many of us have been entranced by heroes. Perhaps it's our desire to be saved, to not have to do the hard work, to rely on someone else to figure things out. Constantly we are barraged by politicians presenting themselves as heroes, the ones who will fix everything and make our problems go away. It's a seductive image, an enticing promise. And we keep believing it. Somewhere there's someone who will make it all better. Somewhere, there's someone who's visionary, inspiring, brilliant, trustworthy, and we'll all happily follow him or her. Somewhere...

Well, it is time for all the heroes to go home, as the poet William Stafford wrote. It is time for us to give up these hopes and expectations that only breed dependency and passivity, and that do not give us solutions to the challenges we face. It is time to stop waiting for someone to save us. It is time to face the truth of our situation-that we're all in this together, that we all have a voice-and figure out how to mobilize the hearts and minds of everyone in our workplaces and communities.

Why do we continue to hope for heroes? It seems we assume certain things:

- Leaders have the answers. They know what to do.
- People do what they're told. They just have to be given good plans and instructions.
- High risk requires high control. As situations grow more complex and challenging, power needs to shift to the top (with the leaders who know what to do.)

These beliefs give rise to the models of command and control revered in organizations and governments world-wide. Those at the bottom of the hierarchy submit to the greater vision and expertise of those above. Leaders promise to get us out of this mess; we willingly surrender individual autonomy in exchange for security.

The only predictable consequence of leaders attempts to wrest control of a complex, even chaotic situation, is that they create more chaos. They go into isolation with just a few key advisors, and attempt to find a simple solution (quickly) to a complex problem. And people pressure them to do just that. Everyone wants the problem to disappear; cries of "fix it!" arise from the public. Leaders scramble to look like they've taken charge and have everything in hand.

But the causes of today's problems are complex and interconnected. There are no simple answers, and no one individual can possibly know what to do. We seem unable to acknowledge these complex realities. Instead, when the leader fails to resolve the crisis, we fire him or her, and immediately begin searching for the next (more perfect) one. We don't question our expectations of leaders, we don't question our desire for heroes.

## The Illusion of Control

Heroic leadership rests on the illusion that someone can be in control. Yet we live in a world of complex systems whose very existence means they are inherently uncontrollable. No one is in charge of our food systems. No one is in charge of our schools. No one is in charge of the environment. No one is in charge of national security. No one is in charge! These systems are emergent phenomena—the result of thousands of small, local actions that converged to create powerful systems with properties that may bear little or no resemblance to the smaller actions that gave rise to them. These are the systems that now dominate our lives; they cannot be changed by working backwards, focusing on only a few simple causes. And certainly they cannot be changed by the boldest visions of our most heroic leaders.

If we want to be able to get these complex systems to work better, we need to abandon our reliance on the leader-as-hero and invite in the leader-as-host. We need to support those leaders who know that problems are complex, who know that in order to understand the full complexity of any issue, all parts of the system need to be invited in to participate and contribute. We, as followers, need to give our leaders time, patience, forgiveness; and we need to be willing to step up and contribute.

These leaders-as-hosts are candid enough to admit that they don't know what to do; they realize that it's sheer foolishness to rely only on them for answers. But they also know they can trust in other people's creativity and commitment to get the work done. They know that other people, no matter where they are in the organizational hierarchy, can be as motivated, diligent and creative as the leader, given the right invitation.

## The Journey from Hero to Host

Leaders who journey from hero to host have seen past the negative dynamics of politics and opposition that hierarchy breeds, they've ignored the organizational charts and role descriptions that confine people's potential. Instead, they've become curious. Who's in this organization or community? What skills and capacities might they offer if they were invited into the work as full contributors? What do they know, what insights do they have that might lead to a solution to this problem?

Leaders-as-hosts know that people willingly support those things they've played a part in creating—that you can't expect people to 'buy-in' to plans and projects developed elsewhere. Leaders-as-hosts invest in meaningful conversations among people from many parts of the system as the most productive way to engender new insights and possibilities for action. They trust that people are willing to contribute, and that most people yearn to find meaning and possibility in their lives and work. And these leaders know that hosting others is the only way to get complex, intractable problems solved.

Leaders-as-hosts don't just benevolently let go and trust that people will do good work on their own. Leaders have a great many things to attend to, but these are quite different than the work of heroes. Hosting leaders must:

- provide conditions and good group processes for people to work together.
- provide resources of time, the scarcest commodity of all.
- insist that people and the system learn from experience, frequently.

- offer unequivocal support—people know the leader is there for them.
- keep the bureaucracy at bay, creating oases (or bunkers) where people are less encumbered by senseless demands for reports and administrivia.
- play defense with other leaders who want to take back control, who are critical that people have been given too much freedom.
- reflect back to people on a regular basis how they're doing, what they're accomplishing, how far they've journeyed.
- work with people to develop relevant measures of progress to make their achievements visible.
- value conviviality and esprit de corps—not false rah - rah activities, but the spirit that arises in any group that accomplishes difficult work together.

### Challenges from Superiors

It's important to note how leaders journeying from hero to host use their positional power. They have to work all levels of the hierarchy; most often, it's easier to gain support and respect from the people they lead than it is to gain it from their superiors. Most senior leaders of large hierarchies believe in their inherent superiority, as proven by the position they've attained. They don't believe that everyday people are as creative or self-motivated as are they. When participation is suggested as the means to gather insights and ideas from staff on a complex problem, senior leaders often will block such activities. They justify their opposition by stating that people would use this opportunity to take advantage of the organization; or that they would suggest ideas that have no bearing to the organization's mission; or that people would feel overly confident and overstep their roles. In truth, many senior leaders view engaging the whole system as a threat to their own power and control. They consistently choose for control, and the resultant chaos, rather than invite people in to solve difficult and complex problems.

Leaders who do know the value of full engagement, who do trust those they lead, have to constantly defend their staff from senior leaders who insist on more controls and more bureaucracy to curtail their activities, even when those very activities are producing excellent results. Strange to say, but too many senior leaders choose control over effectiveness; they're willing to risk creating more chaos by continuing their take-charge, command and control leadership.

### Re-engaging People

Those who've been held back in confining roles, who've been buried in the hierarchy, will eventually blossom and develop in the company of a hosting leader. Yet, it takes time for employees to believe that this boss is different, that this leader actually wants them to contribute. It can take 12 to 18 months in systems where people have been silenced into submission by autocratic leadership. These days, most people take a wait-and-see attitude, no longer interested in participating because past invitations weren't sincere, or didn't engage them in meaningful work. The leader needs to prove him or herself by continually insisting that work cannot be accomplished, nor problems solved without the participation of everyone. If the message is sincere and consistent, people gradually return to life; even people who have died on the job, who're just waiting until retirement, can come alive in the presence of a leader who encourages them and creates opportunities for them to contribute.

Leaders-as-hosts need to be skilled conveners. They realize that their organization or community is rich in resources, and that the easiest way to discover these is to bring diverse

people together in conversations that matter. People who didn't like each other, people who discounted and ignored each other, people who felt invisible, neglected, left out-these are the people who can emerge from their boxes and labels to become interesting, engaged colleagues and citizens.

Hosting meaningful conversations isn't about getting people to like each other or feel good. It's about creating the means for problems to get solved, for teams to function well, for people to become energetic activists. Hosting Leaders create substantive change by relying on everyone's creativity, commitment and generosity. They learn from firsthand experience that these qualities are present in just about everyone and in every organization. They extend sincere invitations, ask good questions, and have the courage to support risk-taking and experimentation.

### **Are You a Hero?**

Many of us can get caught up acting like heroes, not from power drives, but from our good intentions and desires to help. Are you acting as a hero? Here's how to know.

You're acting as a hero when you believe that if you just work harder, you'll fix things; that if you just get smarter or learn a new technique, you'll be able to solve problems for others. You're acting as a hero if you take on more and more projects and causes and have less time for relationships. You're playing the hero if you believe that you can save the situation, the person, the world.

Our heroic impulses most often are born from the best of intentions. We want to help, we want to solve, we want to fix. Yet this is the illusion of specialness, that we're the only ones who can offer help, service, skills. If we don't do it, nobody will. This hero's path has only one guaranteed destination-we end up feeling lonely, exhausted and unappreciated.

It is time for all us heroes to go home because, if we do, we'll notice that we're not alone. We're surrounded by people just like us. They too want to contribute, they too have ideas, they want to be useful to others and solve their own problems.

Truth be told, they never wanted heroes to rescue them anyway.

*Parts of this article are excerpts from Walk Out Walk On: A Learning Journey Into Communities Daring to Live the Future Now. Margaret Wheatley & Deborah Frieze. Berrett - Koehler Publishers, Forthcoming April 2011*

# Running an Effective Meeting

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## Keep It Purposeful

### Why are you having a meeting?

If you don't have an answer, you don't need a meeting.

Meetings without purpose only serve to turn people off.

### Best Practices

#### Before the Meeting

- Create an agenda.
- Review previous agendas for unfinished action items.
- Send agenda and reports in advance.
- Set goals for the meeting.
- Assign preparation for the meeting topics and logistics.

#### During the Meeting

- Start on time.
- End on time.
- Stick to the agenda.
- Have a method for people to submit off-topic items. ("parking lot")
- Include time for clarifying questions.
- Most of the meeting should be spend on progress on your goals with deliberation and decisions on actions.
- Keep moving.
- Consider breakout groups, when appropriate/useful.
- Assign a leader and a timeline to each action item.

#### After the Meeting

- Send out meetings notes/minutes ASAP.
- Send reminders of timelines on action items.
- Empower each leader of an action item to own their task.
- Ask for feedback about the meeting process and opportunities for improvement.

#### Don't

- Don't have meetings when everyone is unprepared.
- Don't have a meeting without a goal or purpose.

### Ideas to Try

- Start your meeting with a positive share from everyone or a few volunteers to set the tone.

- Try a new location.
- Ditch the table and sit in a circle.
- Take a stretch break for those longer meetings.
- Don't allow laptops or tablets during discussion/deliberation.
- Toss a stuffed animal to whomever is speaking to help balance talk time.
- Use an affinity diagrams and pareto voting to help sort through which issue or topic is of most interest to the group (see section on affinity diagrams and pareto voting elsewhere in this manual).
- Use a google doc to keep track of who is in charge of each aspect of a meeting and of any action items that come from those meetings.

### **What type of meeting is it?**

#### **Small group (5-10 people)**

Ex. Executive board, building team, negotiations team, discussion team, etc..

Useful for consensus building, diving deep in to a topic, and managing activities of the union.

#### **Large group (10+ people)**

Ex. Whole building, corporation-level meeting, etc...

Useful for sharing information, getting agreement/disagreement on discreet topics, building connections across groups

#### **10-minute stand-up meeting**

Useful for sharing quick information and ending with an "ask"

Ex. Post bad bargaining session, share out what occurred, and ask for attendance at next board meeting.

#### **Executive board meeting**

Monthly meeting to go over action items, approve budget expenditures, prepare for large member meetings.

#### **All member meeting**

Used for voting on contract, constitution/bylaw reaffiliation or changes, election of officers, sharing of corporation level information, creating connections.



# Decision Making Options

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## An In-Depth Look

### Consensus

Involves everyone clearly understanding the situation/problem, all relevant facts, and jointly developing solutions. Lots of listening, healthy debate, and testing of options. Generates a decision that all can accept.

**Pros-** Collaborative effort that unites the group. Demands high involvement. Systematic, objective, and fact-driven. Builds buy-in and high commitment to the outcome.

**Cons-** Time-consuming and produces low-quality decision if done without proper data collection or if members have poor team interaction skills.

**Uses-** When decisions will impact the entire group; when buy-in and ideas from all members are essential; when the importance of the decision is worth the time it will take to complete the process properly.

### Majority Voting

Involves asking people to choose the option they favor, after clear choices have been identified. Usual methods are a show of hands or secret ballot. Quality of voting is enhanced if there is good discussion prior to taking a vote.

**Pros-** It's fast. Decisions can be of a higher quality if preceded by a thorough analysis.

**Cons-** It can be too fast and low in quality if people vote based on personal feelings, without hearing each other's thoughts or facts. It creates winners and losers, potentially dividing the group. Show of hands method may put pressure on people to conform.

**Uses-** When there are two distinct options and one must be chosen; when decisions must be made quickly, and a division in the group is acceptable; when consensus has been attempted and cannot be reached.

### Multi-voting

This is a priority-setting tool that is useful in making decisions when the group has a lengthy set of options before them. Ordering the options, based on a set of criteria, will clarify the best course of action.

**Pros-** It's systematic, objective, democratic, non-competitive, and participative.

Everyone wins somewhat and feelings of loss are minimal. It's a fast way of sorting out a complex set of options.

**Cons-** It's often associated with limited discussion, hence, limited understanding of the options. This may force choices on people that may not be satisfactory to them, because the real priorities do not rise to the surface or people are swayed by each other if the voting is done out in the open rather than by ballot.

**Uses-** When there's a long list of alternatives or items from which to choose; or when choosing a set of criteria to identify the best course of action.

### Compromise

A negotiated approach applicable when there are two or more distinct options and members are strongly polarized (neither side is willing to accept the solution/position put forth by the other side). A middle position is then created that incorporates ideas from both sides. Throughout



the process of negotiation everyone wins a few of their favorite points but also loses a few items they liked. The outcome is, therefore, something that no one is totally satisfied with. In compromises no one feels they got what they originally wanted, so the emotional reaction is often "It's not really what I wanted but I'm going to have to live with it."

**Pros-** It generates lots of discussion and does create a solution.

**Cons-** Negotiating when people are pushing a favored point of view tends to be adversarial, hence this approach divides the group. In the end everyone wins, but everyone also loses.

**Uses-** When two opposing solutions are proposed, neither of which is acceptable to everyone; or when the group is strongly polarized and compromise is the only alternative.

### **One Person Decides**

This is a decision that the group decides to refer to one individual to make on behalf of the group. A common misconception among teams is that every decision needs to be made by the whole group. In fact, a one-person decision is often a faster and more efficient way to get resolution. The quality of any one person's decision can be raised considerably if the person making the decision gets advice and input from other group members before they decide.

**Pros-** It's fast and accountability is clear.

**Cons-** It can divide the group if the person deciding doesn't consult, or makes a decision that others can't live with. One person's decision typically lacks in both buy-in and the synergy that comes from a group decision-making process.

**Uses-** When the issue is unimportant or small; or when there's a clear expert in the group; or when only one person has the information needed to make the decision and can't share it; or when one person is solely accountable for the outcome.

### **Unanimous**

This happens occasionally when there's a solution that is favored by everyone and 100% agreement seems to happen automatically. Unanimous decisions are usually made quickly. They are rare and often occur in connection with trivial or simple issues.

**Pros-** It's fast, easy, everyone is happy, and it unites the group.

**Cons-** May be too fast; perhaps the issue actually needed discussion.

**Uses-** When lack of discussion isn't vital (i.e., issues are trivial) or when issues are not complex, requiring no in-depth discussion.

*Based on material from Facilitating with Ease! by Ingrid Bens*

# Sample Executive Board Agenda

## TEFFT EDUCATION ASSOCIATION EXECUTIVE BOARD AGENDA

January 18, 2021 at 4:30 Central  
Room 204, Tefft High School

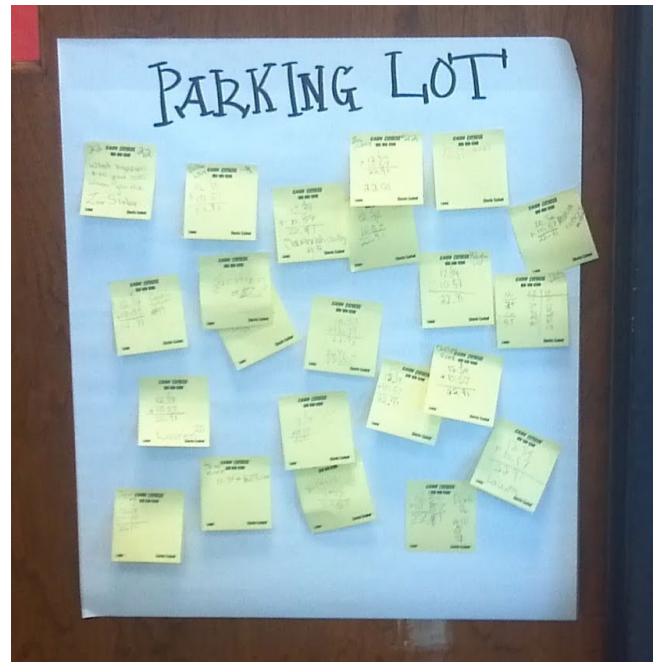
1. Adoption of the Agenda with Flexibility
2. Woohoo! Moments – *Sharing things that have occurred in the last month that we should take a moment to celebrate.*
3. Reports – *The following reports were submitted via our shared Google folder one week before the meeting. This time is for clarifying questions or potential corrects to those reports. We will not be reading the reports during the meeting.*
  - a. Questions and Clarification on any of the following:
    - i. Secretary's Report
    - ii. Treasurer's Report
    - iii. President's Report
    - iv. Tefft Elementary Association Reps Report
    - v. Tefft Middle School Association Reps Report
    - vi. Tefft High School Association Reps Report
    - vii. Discussion Chair's Report
    - viii. Insurance Chair's Report
    - ix. Bargaining Chair's Report
    - x. Evaluation Chair's Report
  - b. Approval of the reports
4. Unfinished business/action items
  - a. Membership
    - i. Current membership counts
    - ii. Review of upcoming membership activities
    - iii. Suggestion for new activities
  - b. Results of Climate Survey
    - i. Review results of climate survey in aggregate and by building
    - ii. Make list of items where members show most dissatisfaction
    - iii. Determine a few items to initially address
    - iv. Develop plan to address these items
5. New business/action items
  - a. Election of a new bargaining team
  - b. Developing a bargaining support team who creates and implements a community organizing plan for bargaining.
  - c. Representation at school board meetings.
6. Dilemma Discussion
  - a. Format
  - b. Practice
7. Items from Parking Lot
8. Other

### 9. Upcoming Events

- a. This year's Executive Board Schedule, all at 4:30 Central at Tefft HS Room 204:
  - i. Wed Feb 8, 2021
  - ii. Wed Mar 8, 2021
  - iii. Wed Apr 12, 2021
  - iv. Wed May 10, 2021
- b. Northern Conference – February 17 & 18, 2021 at Swan Lake in Plymouth
- c. Collective Bargaining Conferences – Partial Days, Topics – Changes in law, changes in compliance, where to find the money
  - i. June 20 – South Bend and Scottsburg
  - ii. June 21 – Evansville and Lafayette
  - iii. June 22 – Indianapolis
  - iv. June 27 – Valpo
  - v. June 28 – Fort Wayne

### Parking Lot

A parking lot is a place where meeting attendees can put off topic questions or topics to be addressed at a later point in the meeting.



# Sample 10 Minute Meeting Agenda

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## **Tefft Educaiton Association**

### **10 Minute Meeting Agenda**

#### **Topic: RIF Discussion**

1. Who was present at Discussion? (1 min)
2. Positions scheduled to be RIF'd (2 min)
3. Rainy Day, Cash Reserves, Capital Projects (2 min)
4. Other efficiency issues that may be considered (2 min)
5. Other issues (2 min)
6. What can you do? (1 min)
7. Dismiss

If you have questions, feel free to leave a written copy with the discussion committee members or to stay a few minutes longer and ask questions.

Thank you for coming! ☺

## Dilemma Discussion

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### **Solving Problems Efficiently & Effectively**

1. Person 1 briefly describes dilemma in 2-3 minutes.
  - a. What is dilemma?
  - b. What would success look like?
2. All other people ask clarifying questions that do not include “Have you tried . . . ?”.
3. Person 1 sits back, listens, takes notes, and does not speak.
4. All other people dissect, discuss, or give ideas to move toward success.
5. Person 1 re-enters conversation and tells what they heard and will now try.

# Team Development

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Directions: Consider the following questions and discuss after reviewing the text.

1. Who is on your team?
2. Who do you want on your team?
3. Is there a difference between #1 and #2?
4. What happens when your team changes?

## Characteristics of an Effective Team

- Inclusive
- Diverse
- Respectful of its members
- Facilitates decision-making
- Creative and responsive
- Shared responsibility across team
- Safe space
- Honest

## Resolving Conflict within a Team

### Accept

While you need not agree with the criticism of your idea, you do need to accept it is offered with sincerity.

Avoid making statements that appear to be put-downs or ridicule.

### Make it a group issue

If you hang back from defending your idea, you may be pleasantly surprised to hear someone else take up the defense.

### Answer

If group discussion of your idea misses key points, you may want to respond to some of the disagreement.

Do this by addressing the group, not your critic.

### Relax

When you are relaxed, you listen and think more clearly. Breathe.

### Listen

Listen without judging or assuming.

# Facilitation & Effective Questioning

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## How Facilitation Can Help a Team

Facilitation is a process for helping the leadership team get its work done. A facilitator can be someone the team asks for assistance or a team member(s) who agree(s) to be neutral. The team leader usually maintains that role while someone else acts as facilitator. The facilitator can do the following:

- Help the group define its overall goal, as well as specific objectives.
- Help members assess their needs and create plans to meet them.
- Provide processes that help members to make high quality decisions.
- Guide group discussion to keep it on track.
- Make accurate notes that reflect the ideas of members.
- Help the group understand its own processes to work more effectively.
- Support members in assessing their current skills as well as building new skills.
- Manage conflict.
- Help the group communicate effectively.
- Help the group access resources.
- Foster leadership in others.
- Teach others to facilitate.

## Facilitation Practices

### Stay Neutral on Content

Your job is to focus on the process role and avoid the temptation of offering opinions about the topic under discussion. You should use questions and suggestions to offer ideas that spring to mind but never impose your opinions on the group.

### Listen Actively

Use attentive body language and paraphrase what people are saying. Make eye contact with people while they speak, when paraphrasing what they have just said, and when summarizing their key ideas.

### Paraphrase to Clarify

This involves repeating what people say to make sure to clarify key ideas and to let others hear their points a second time (e.g. "Are you saying...? Do I understand you to mean...?")

### Ask Questions

This is the most important tool you possess. Questions invite participation, gather information, test assumptions, and probe for hidden points.

### Test assumptions

You need to bring the assumptions people are using out into the open and clarify them so that they are clearly understood by everyone. These assumptions may even need to be challenged

before a group can explore new ground. (e.g. "John, on what basis are you making the comment that Bob's idea is too narrow in focus?")

### **Summarize periodically**

An effective facilitator listens attentively to all that is said and then offers concise and timed summaries. Summarize when you want to revive a discussion that has ground to a halt or to end a discussion when things seem to be wrapping up.

### **Effective Questioning**

The following sample questions may inspire ideas for looking more deeply into an issue.

- What is keeping the problem from being solved?
- Why do you feel that way?
- What experiences have led you to that position?
- Is there data to support this?
- Who wants change to take place? Who does not?
- If the issue were totally resolved, what would the situation look like?
- What are the most significant barriers to resolving this issue?
- What are the limits of this effort? (time, money, materials)
- Are any solutions going to be unacceptable?
- Do you feel the group is overlooking some important considerations?

#### **Do . . .**

Ask clear, concise questions covering a single issue  
 Ask challenging questions that will stimulate thought  
 Ask reasonable questions based on what people know  
 Ask honest and relevant questions

#### **Don't . . .**

Ask rambling, ambiguous questions that cover multiple issues  
 Ask questions that don't provide an opportunity for thought  
 Ask questions that most people can't answer  
 Ask "trick" questions designed to fool people



# Conflict Resolution & the Four Behaviors

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*Conflict happens. It's natural. It's normal. It's necessary.  
Effectively dealing with conflict is often one of the strongest indicators of your leadership.*

## Behaviors

*Identifying Assertive, Passive, Aggressive, & Passive-Aggressive Behaviors*

### Assertive Behavior

Being assertive is standing up for your rights without violating the rights of someone else, achieving the right balance between your needs and the needs of others. Assertiveness is the behavior required for successful outcomes when working in groups.

People behaving assertively value every person's needs, state what they want and do it in a way that takes into consideration the needs of others. People using assertive behavior believe that it is the responsibility of everyone to say what they need.

#### Assertive Behavior Cues

- Making direct eye contact
- Having a confident stance
- Asking others what they need
- Being concerned about everyone's feelings, including one's own
- Expecting everyone to be self-accountable

#### Key Assertive Skills

- Use declarative "I" statements to explain what you want or think.
- Describe the behavior you find to be unacceptable and give expectations for future behavior.
- Compromise by coming to agreement, satisfying everyone's basic needs.
- Limit your response when attacked.
- Hold the other person accountable for his or her behavior while stating how you want to be treated.

### Passive Behavior

People using passive behavior communicate indirectly and do not say what they want. They expect others to figure out what they need and give it to them pout or withdraw when they don't get it.

People behaving passively are very concerned about how others view them and want to be liked. They behave in self-sacrificing ways, but later resent the person for whom they made the sacrifice.

#### Passive Behavior Cues

- Hoping others will give them what they want or need
- Hinting to others without stating directly what they want or need

- Pouting or withdrawing when they don't get what they want
- Being concerned about how others judge them and their actions
- Wanting to be liked by everyone
- Acting in self-sacrificing ways

## **Aggressive Behavior**

People using aggressive behavior don't care about the needs or feelings of others or about how others perceive them.

This type of behavior continues because it often works. Others are hesitant to "take on" aggressive people because it is so unpleasant.

### **Aggressive Behavior Cues**

- Using a loud, blustering voice
- Swearing or using abusive language
- Violating another's space
- Pounding on desks or staring
- Demanding what they need from others
- Being concerned only with their own feelings
- Enjoying being feared

## **Passive-Aggressive Behavior**

People behaving passive-aggressively avoid direct response, but "get even" with others later for real or imagined slights. These individuals don't tell others when something bothers them, giving permission to the other person to continue the behavior that is offensive.

This behavior is interesting because it's a combination of two other styles. Passive behavior changes to passive-aggressive when people become "fed up." Aggressive behavior changes to passive-aggressive when people recognize that they can't act in their normal aggressive fashion (usually because of an authority situation).

### **Passive-Aggressive Behavior Cues**

- Being sarcastic
- Sniping or indirect criticism
- Avoiding eye contact
- Never directly stating what they want or need
- Hinting
- Becoming "fed up" and blowing up

## **Scenario**

Bob, Jen, Tim, Kim, and Lani are all on a bargaining team together. Lani is the chair. During caucus, discussion on whether to pay a stipend to highly effective teachers above the standard amount effective teachers receive gets heated. Bob begins to yell about only women being rated highly effective in his building. Kim is playing on her phone and just shrugs when Bob wants her to agree with him. Tim is trying to get Bob to calm down, tells him he understands, and doesn't

want Bob angry at him. Jen calmly asks Bob if he needs representation at his next evaluation meeting and if he believes he has been unfairly evaluated. She explains that she was rated effective by the same principal and understands it can be frustrating. Lani asks if all the principals scored similarly, would we, as a team, be okay with a stipend for highly effective? Or, is our biggest concern the lack of consistency in evaluation scores from different evaluators?

1. What behavior do you see from Bob?
2. What behavior do you see from Kim?
3. What behavior do you see from Tim?
4. What behavior do you see from Jen?
5. What behavior do you see from Lani?
6. How would you handle this meeting?
7. Have you noticed yourself exhibiting one or more of these behaviors?
8. Which were most successful and in what instances were they successful?

### Conflict Resolution Strategies

1. **Recognize that all of us have biased fairness perceptions.** Both parties to a conflict typically think they're right and the other side is wrong. They quite literally can't get out of their own heads. Research by Carnegie Mellon University professors Linda Babcock and George Loewenstein shows their sense of what constitutes a fair conflict resolution is biased by *egocentrism* or difficulty seeing a situation from another's perspective. When in a conflict, we need to overcome our self-centered fairness perceptions. We might do this by jointly hiring a mediator who can help us see one another's point of view, or by enlisting another type of unbiased expert, such as an appraiser, to offer their view of the "facts."
2. **Avoid escalating tensions with threats and provocative moves.** When we feel we're being ignored or steamrolled, we often try to capture the other party's attention by making a threat, such as saying we'll take a dispute to court or try to ruin the other party's business reputation. There's a time and place for litigation, but threats and other attention-getting moves, such as take-it-or-leave-it offers, are often a mistake. Before making a threat, be sure you have exhausted all other options for managing conflict. People tend to respond to threats in kind, leading to an escalatory spiral and worsening conflict.
3. **Overcome an "Us vs. Them" mentality.** Group connections build loyalty and strong relationships, but they can also promote suspicion and hostility toward members of out-groups. As a result, groups in conflict tend to have an inaccurate understanding of each other's views and to see the other's positions as more extreme than they actually are. Whether as a group or on your own, you can overcome the tendency to demonize the other side by looking for an identity or goal you share. Begin your conflict management efforts by highlighting your common goal of reaching a fair and sustainable agreement. Try to identify and discuss points of similarity between you. The more points of connection you can identify, the more collaborative and productive your conflict resolution process is likely to be.
4. **Look beneath the surface to identify deeper issues.** Our deepest disputes often seem to involve money, for example: labor disputes over employee wages, and family conflicts over assets, etc. Because money is a finite resource, these conflicts tend to be single-issue battles in which one party's gain will inevitably be the other party's loss. But disputes over money often involve much deeper causes of conflict, such as the feeling that one is being disrespected or overlooked. The next time you find yourself arguing over the division of funds, suggest putting that conversation on hold. Then take time to explore each other's deeper concerns. Listen closely to one another's grievances and try to come up with creative ways to address them. This conflict management strategy is likely to strengthen the relationship and add new interests to the table, expanding the pie of value to be divided in the process.

5. **Separate sacred from pseudo-sacred issues.** Conflict management can be intractable when core values that negotiators believe are sacred, or nonnegotiable, are involved (eg. their family bonds, religious beliefs, political views, or personal moral code). Take the case of two siblings who disagree about whether to sell their deceased parents' farm, with one of them insisting the land must remain in the family and the other arguing that the parents would want them to sell it. We tend to err on the side of not negotiating when sacred principles and values are at stake, writes Program on Negotiation chair Robert Mnookin in his book *Bargaining with the Devil: When to Negotiate, When to Fight*. But many of the issues negotiators consider sacred are actually *pseudo-sacred*, notes Harvard Business School professor Max H. Bazerman—that is, the issues are only off-limits under certain conditions. So it's important to thoroughly analyze the benefits you might expect from negotiation that could allow you to honor your principles. For example, the sibling's objections to selling the family land might soften if a percentage of the proceeds are donated to the parents' favorite charity.

Borrowed from <https://www.pon.harvard.edu/daily/conflict-resolution/conflict-resolution-strategies/>

# Triage for Local Leaders

## Scenarios & Notepad

**Directions:** On chart paper, draw a chart similar to what you see on the note pad. Then place each of these scenarios in what your group thinks is the appropriate box. Write the scenario number in the box as well as the role of the person who should initially address the issue.

1. You discover the superintendent is paying a new hire the incorrect salary.
2. You realize that for the past several years, your Local has been acquiescing on committee positions and rather than appointing members to serve on committees at a rate equal to your membership percentage, teachers just sign up for committees. You know this isn't right and you have to do something about it.
3. A group of members has complained that there is no Local newsletter and they have petitioned the Local officers to start one.
4. Your UniServ Director, who suggests you do a whole bunch of things that seem like a lot of work, mentions that each Local should do a climate survey annually. Your Local has not done a climate survey for as long as you can remember but you do hear a lot of complaints from members about the middle school administrators.
5. Your UniServ Director, who suggests you do a whole bunch of things that seem like a lot of work, mentions that each Local should do a climate survey annually. Your Local has not done a climate survey for as long as you can remember but you deal with many climate issues each month at Discussion.
6. The legislative session just ended and your legislator did a crummy job, in your opinion. You feel like someone should call him/her to chat about how he/she should vote differently in the future.
7. Your Local isn't doing Discussion. At all. Like none.
8. It's September 1. Your membership is 48%. You know that most non-members have not gotten at one-on-one conversation with your building reps/association reps.
9. Your principal sends emails in the evenings and weekends. She says there is no expectation that these be read during the evenings and weekends but staff are feeling pressure to do so.
10. A member submits a letter of resignation in lieu of termination. A few hours before the next school board meeting, the member is told that the school board will not accept his resignation but will take action to cancel his contract instead.
11. Three members are not happy about the financial package that was bargained and want to meet about it. The bargaining timeline has expired, the contract has been ratified, and the next bargaining doesn't start for 10 months.

12. My colleagues and I are buried constantly by updating my records on the endless assessments we're supposed to give to our first graders - progress monitoring, oral and written assessments, sight words, etc. We're expected to have all my data up to date on Mondays after testing on Fridays. How do we get our weekends back and record it all?
13. Our special education teachers are feeling overwhelmed with teaching 8 groups a day, being the case manager for 27+ kids including several on behavior plans that need daily interventions, lesson planning, parent communication, and all that is expected in our school corporation.

## Emergencies/Fires That Need to Be Put Out

## Important Issues to Deal with Soon

## Issues that Need to Be Dealt With This Year

## Issues that I'll Get to Some Day

# Sample Election Nomination Form

## Tefft Education Association Election Nominations

Please take a moment to nominate yourself or another member for the offices listed below. Two members may run together to share a single officer position. All offices are held for one year, with no term limits. Elected officers are responsible for attending monthly Leadership Team meetings. Place nomination forms in building rep's mailbox by April 3, 2021. If you are nominated, a building rep will verify your nomination acceptance. Once nominations are confirmed, elections will be held in each building on April 26, 2021.

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**President**


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**Vice President of Membership Representation**


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**Vice President of Membership**


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**Vice President of Bargaining**


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**Vice President of Discussion**


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**Vice President of Scholarship Fund**


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**Vice President of Sick Leave Bank**


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**Vice President of Evaluation**


---

**Secretary**


---

**Treasurer**


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**District Council Delegate (1st nomination)**


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**District Council Delegate (2nd nomination)**


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**Delegate to the ISTA Representative Assembly  
(1st nomination)**


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**Delegate to the ISTA Representative Assembly  
(2nd nomination)**

For Building Representatives and Committee Members, nominate only for the school in which you are placed and for up to the number allowed per building: Dunn's Bridge - 2, Kniman - 2, Kersey - 2, Tefft MS - 2, Tefft High School - 3.

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**Building Representative**


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**Membership Committee**


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**Bargaining Committee**


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**Scholarship Committee**


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**Sick Leave Bank Committee**


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**Evaluation Committee**


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**Discussion Committee**



## Tefft Education Association Officers and Responsibilities

**President:** shall preside at all meetings of the TLCTO and the Leadership Team and shall be an ex-officio member of all committees.

**Vice President of Member Representation:** shall assume all duties of the president in case of absence, resignation, or death, coordinate training for building representatives on representing members when necessary, assist building representatives when representing members when necessary, and coordinate with the President on member representation issues when necessary.

**Vice President of Membership:** shall be in charge of all on-going membership campaigns, maintain a current list of members and non-members, maintain a current email list of members, and report current membership numbers at each meeting of the Leadership Team.

**Vice President of Bargaining:** shall coordinate training for bargaining team members when necessary, maintain communication with the superintendent about bargaining, call and coordinate meetings of the bargaining team, ensure communication between the bargaining team and members, and organize the ratification meeting.

**Vice President of Discussion:** shall coordinate training for discussion team members when necessary, maintain communication with the superintendent about discussion, call and coordinate meetings of the discussion team, and ensure communication between the discussion team and members.

**Vice President of Scholarship Fund:** shall collect applications for the TLCTO scholarship, organize scholarship committee meetings to determine scholarship winners, organize someone to present the scholarship at Awards Night, and ensure scholarship funds are distributed to recipients.

**Vice President of Sick Leave Bank:** shall collect requests to the sick leave bank, organize meetings of the sick leave bank committee, and communicate the decisions of the sick leave bank committee to appropriate parties.

**Vice President of Evaluation:** shall solicit feedback on the evaluation model, coordinate meetings of the evaluation committee, and communicate decision of the committee to the Leadership Team and members.

**Secretary:** shall keep minutes of all meetings of the TLCTO and the Leadership Team, shall notify the President if any elected member of the Leadership Team resigns or forfeits their membership on the Leadership Team, shall notify members in advance of all TLCTO and Leadership Team meetings, shall send emails to members on behalf of other officers when requested, shall provide to members a short summary of Leadership Team meetings, and shall maintain the hard copy and digital files of the TLCTO.

**Treasurer:** shall have charge of all funds of the TLCTO, shall maintain them in a bank in the name of the organization with the President as a co-signer on the account, and shall disburse funds as authorized by a vote the Leadership Team, and shall develop a budget for approval by the Leadership Team and provide account balances at each meeting of the Leadership Team.

**District Council Delegates:** shall represent TLCTO at District Council meetings and report back from those meetings to the members.

**Delegates to the ISTA Representative Assembly:** shall attend the one-day ISTA Representative Assembly, vote on matters before the assembly on behalf of members, and report back information from the Representative Assembly to the members.

**Building Representatives:** shall be responsible for representing members in meetings with their principals and shall assist with membership.

**Committee Members:** shall be responsible for scheduling and attending meetings and relaying information back to the Leadership Team.

# Sample Election Ballot

## Tefft Education Association Election Ballot

*Please circle the member(s) for whom you wish to vote for the following positions. Vote once per position except where noted. When two names are separated by an ampersand (&) that indicates those two members are running together to share a single position, which is allowable according to our constitution and bylaws.*

### **President**

Frank Underwood • Clair Underwood & Doug Stamper • Zoe Barnes • Write In:

### **Vice President of Membership Representation**

Blanche Devereaux • Rose Nylund • Sophia Petrillo & Dorothy Zbornak • Write In:

### **Vice President of Membership**

Willis Jackson & Kimberly Drummond • Arnold Jackson • Phillip Drummond • Write In:

### **Vice President of Bargaining**

Daisy Duke & Luke Duke • Bo Duke • Roscoe P. Coltrane • Boss Hog • Write In:

### **Vice President of Discussion**

Jo Polniaczek • Tootie Ramsey • Edna Garrett • Write In:

### **Vice President of Scholarship Fund**

JJ Evans • Florida Evans • Wilona Woods & Thelma Evans • Write In:

### **Vice President of Sick Leave Bank**

Freddie “Boom Boom” Washington • Arnold Horshack • Juan Epstein • Write In:

### **Vice President of Evaluation**

Raj Thomas & Freddy “Rerun” Stubbs • Dwayne Nelson • Dee Thomas • Write In:

### **Secretary**

Roseanne Roseannadanna • Mary Katherine Gallagher • Stuart Smalley • Write In:

### **Treasurer**

George Costanza • Jerry Seinfeld and Elaine Benes • Cosmo Kramer & Frank Costanza • Write In:

### **District Council Delegate (Choose Two)**

Piper Chapman • Suzanne “Crazy Eyes” Warren • Tasha “Taystee” Jefferson • Write In:

### **Delegate to the ISTA Representative Assembly (Choose Two)**

Louise “Weezey” Jefferson • George Jefferson • Florence Johnston • Write In:

OVER OVER OVER OVER OVER OVER OVER OVER OVER OVER OVER OVER

*This part of the ballot is unique for each building. Please select **two** choices for each of the following except the high school should choose **three** for each position.*

### **Tefft MS**

#### **Building Representative**

Woody Boyd • Carla Tortelli • Norm Peterson • Cliff Clavin • Diane Chambers • Write In:

#### **Membership Committee**

Venus Flytrap • Les Nessman • Herb Tarlek • Bailey Quarters • Dr. Johnny Fever • Write In:

#### **Bargaining Committee**

Laura Ingalls • Nellie Oleson • Pa Ingalls • Almanzo Wilder • Mary Ingalls • Write In:

#### **Scholarship Committee**

Mr. Hooper • Olivia Robinson • Gordon Robinson • Maria Rodriguez • Luis Rodriguez • Write In:

#### **Sick Leave Bank Committee**

Laverne DeFazio • Shirley Feeney • Andrew “Squiggy” Squiggman • Lenny Kosnowski • Write In:

#### **Evaluation Committee**

Granny Clampett • Elly May Clampett • Jed Clampett • Jethro Bodine • Jane Hathaway • Write In:

#### **Discussion Committee**

Hot Lips Houlihan • Col. Potter • Max Klinger • Hawkeye Pierce • Radar O’Reilly • Write In:

# Powerhouse Locals

## An Incentive for Locals to Excel

### Powerhouse Local Rubric

- ☐ Meet the Quality Local Award qualifications • 12 pts
  - Share completed submission form with documentation or provide said information to me without submission to ISTA.
  - Qualifications are listed on the back of this paper.
- ☐ At least 6 executive committee meetings • 6 pts
  - Provide agendas and minutes for each meeting
- ☐ At least 2 general membership meetings • 4 pts
  - Provide agendas and minutes for each meeting
- ☐ At least 2 social activities for your local • 4 pts
  - Provide a short summary of when, how many attended, and how the event was received
- ☐ At least 8 corporation wide discussion meetings • 8 pts
  - Provide agendas and minutes for each meeting
- ☐ 1 training with UniServ Director from the Pick a Training list • 10 pts
  - See list.
- ☐ Attendance at Northern Advocate Conference • 4 pts/ attendee
  - List attendees
- ☐ One on one's with membership and/or nonmembers
 

|                                                                                                                        |        |
|------------------------------------------------------------------------------------------------------------------------|--------|
| ○ 1:1's with at least 75% of members                                                                                   | 20 pts |
| ○ 1:1's with 50% of members and 50% of nonmembers                                                                      | 30 pts |
| ○ 1:1's with 50% of members and 80% of nonmembers                                                                      | 40 pts |
| ○ 1:1's with 90% of members and 90% of nonmembers                                                                      | 50 pts |
| ○ Provide list of members and/or nonmembers, as applicable, who you had 1:1's and the leader who spoke to each person. |        |

### Total Points Earned

|                     |   |                                                                  |
|---------------------|---|------------------------------------------------------------------|
| <b>12-20 points</b> | = | Doughnuts for each building and a \$25 gift card for your local  |
| <b>21-30 points</b> | = | Doughnuts for each building and a \$50 gift card for your local  |
| <b>30-40 points</b> | = | Doughnuts for each building and a \$75 gift card for your local  |
| <b>41 + points</b>  | = | Doughnuts for each building and a \$100 gift card for your local |

### Clarifications on the process for applying for Powerhouse Local

You must do all the activities within a given line, unless indicated separately. You can do more than what is on each line. For example, you must have 6 executive committee meetings and submit the agenda and minutes. If you do 5, you would not qualify for that line. If you do 7, that's awesome, but it is still only worth 6 points for this award. 1:1's must be done by a local member to count.

Any questions on what qualifies can be emailed to your UniServ Director.

### Quality Local Award Qualifications Summary

[https://forms.ista-in.org/machform/view.php?id=44315&mf\\_page=2](https://forms.ista-in.org/machform/view.php?id=44315&mf_page=2)

#### Requires all five

1. Increase membership percentage over the previous year or have 75% or more membership.
2. Seat at least 50% of your delegates at ISTA RA.
3. Meet ISTA Bylaws for dues payment.
4. Communicate regularly with all of your members.
5. Meet state association affiliation standards, i.e updated local Constitution and Bylaws.

#### Requires meeting any seven (7) of the following

1. Send at least one representative to NEA RA as state, local, or cluster delegate.
2. Send at least two (2) representatives to ISTA regional or district bargaining training/workshops.
3. Attend at least one ISTA lobbying day or local third house meeting.
4. Have at least one (1) elected district council delegate from the local participating at each District Council meeting.
5. Provide a program that welcomes and informs its new teachers or Education Support Professionals.
6. Hold discussion meetings with the local administration representatives.
7. Send at least one (1) elected officers to the ISTA Summer Conference/other designated event
8. Conduct Association activities to promote community support for public education.
9. Participate in association representative (AR) training.
10. Participate in local treasurer training
11. Obtain at least 75% of all new hires as members.

## Pick a Training

I would like the opportunity to train your officers, association representatives, committee(s), new members, or general membership on one of the following topics this school year.

Please choose one of the following trainings.

Select a month that would work best for you and we will coordinate dates from there.

Each training lasts 45 minutes-1 hour.

You can choose more than one but are asked to choose at least one.

1. Discussion-basics
2. Discussion-advanced
3. Building level discussion and committees
4. Organizing for a stronger local
5. Making the most of meetings
6. Legal rights of members
7. How to represent a member in trouble
8. Where's the Line? Appropriate student-teacher boundaries
9. Conflict resolution
10. Grievance processing
11. Roles and responsibilities of a well-functioning executive committee
12. Association Representative (AR) training
13. Other (please describe what you want to learn/accomplish)

Selection: \_\_\_\_\_ Month: \_\_\_\_\_ Audience: \_\_\_\_\_

Selection: \_\_\_\_\_ Month: \_\_\_\_\_ Audience: \_\_\_\_\_

Selection: \_\_\_\_\_ Month: \_\_\_\_\_ Audience: \_\_\_\_\_

# Your Leadership Style

## An Assessment & Explanation

### What's My Leadership Style? Response and Scoring Form

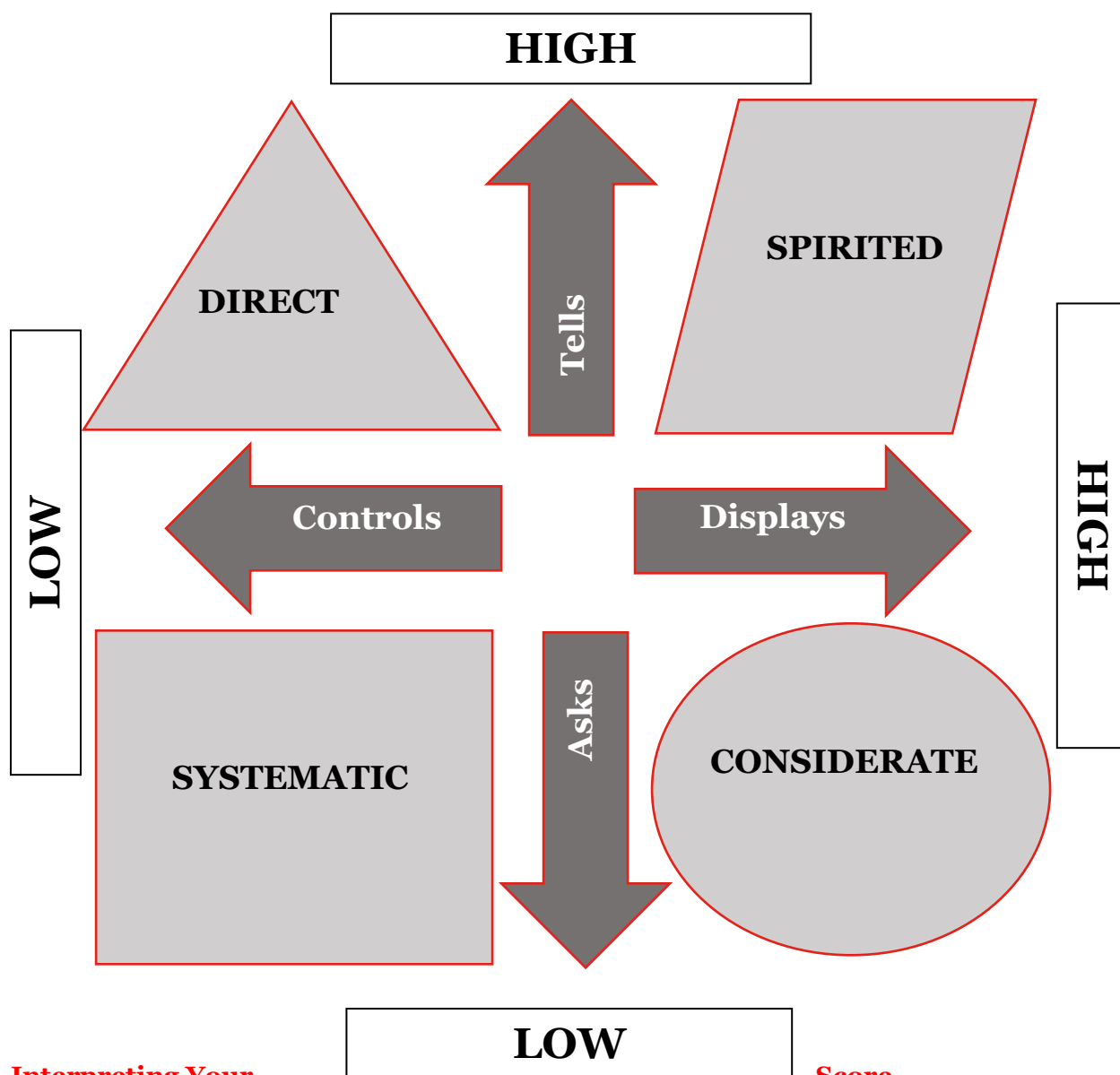
Directions: For each pair of leadership actions below, assign a total of 5 per line points by dividing the points between both actions. Use any combination adding to 5 points (0 and 5, 1 and 4, or 2 and 3 ). Do not use fractions.

**When getting others to work towards a goal, and I am under stress, I am likely to...**

|                                                                                              |                                    | Equal to 5                                                                                 |                                                                                     |                                                                                                   |     |
|----------------------------------------------------------------------------------------------|------------------------------------|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-----|
| 1.                                                                                           | Generate excitement.               |           |    | Act decisively.                                                                                   | 1.  |
| 2.                                                                                           | Take charge.                       |           |    | Offer guidance.                                                                                   | 2.  |
| 3.                                                                                           | Provide encouragement.             |           |    | Provide structure.                                                                                | 3.  |
| 4.                                                                                           | Point out omissions.               |           |    | Seek everyone's input.                                                                            | 4.  |
| 5.                                                                                           | Emphasize goals.                   |           |    | Outline a sequence of steps.                                                                      | 5.  |
| 6.                                                                                           | Promote positive thinking.         |          |   | Push to beat the competition.                                                                     | 6.  |
| 7.                                                                                           | Maintain a comfortable work space. |         |  | Get down to business.                                                                             | 7.  |
| 8.                                                                                           | Define tasks.                      |         |  | Require speed.                                                                                    | 8.  |
| 9.                                                                                           | Direct others.                     |         |  | Create a free environment.                                                                        | 9.  |
| 10.                                                                                          | Listen to suggestions.             |         |  | Provide challenges.                                                                               | 10. |
| 11.                                                                                          | Plan things carefully.             |         |  | Focus on the deadline.                                                                            | 11. |
| 12.                                                                                          | Create a sense of urgency.         |         |  | Spark creative thinking.                                                                          | 12. |
| 13.                                                                                          | Offer inspiration.                 |         |  | Promote cooperation.                                                                              | 13. |
| 14.                                                                                          | Monitor progress closely.          |         |  | Improvise along the way.                                                                          | 14. |
| 15.                                                                                          | Adopt a familiar approach.         |         |  | Brainstorm new approaches.                                                                        | 15. |
| 16.                                                                                          | Make it fun.                       |         |  | Set high standards.                                                                               | 16. |
| 17.                                                                                          | Rally team spirit.                 |         |  | Show appreciation.                                                                                | 17. |
| 18.                                                                                          | Demonstrate enthusiasm.            |         |  | Analyze the situation first.                                                                      | 18. |
| 19.                                                                                          | Request accuracy.                  |         |  | Foster teamwork.                                                                                  | 19. |
| 20.                                                                                          | Promote logical thinking.          |         |  | Help out.                                                                                         | 20. |
| Totals for Each Style                                                                        |                                    |                                                                                            |                                                                                     |                                                                                                   |     |
| Spirited  |                                    | Direct  |                                                                                     | Considerate  |     |
|                                                                                              |                                    |                                                                                            |                                                                                     | Systematic   |     |

## What's My Leadership Style? Response and Scoring Form Part 2

Directions: Copy the totals for each style from the previous page into the chart below. This is your leadership style profile.



### Interpreting Your

### Score

Each of the four styles can be described based on a degree of assertiveness or expressiveness.

|                    |                                                                         |
|--------------------|-------------------------------------------------------------------------|
| <b>Direct</b>      | High assertiveness, low expressiveness, leads by taking charge          |
| <b>Spirited</b>    | High assertiveness, high expressiveness, leads by inspiring             |
| <b>Considerate</b> | Low assertiveness, high expressiveness, leads by building group harmony |
| <b>Systematic</b>  | Low assertiveness, low expressiveness, leads by planning carefully      |

People generally develop a leadership style they are most comfortable using. That is their dominant style. Take a look at your Leadership Style Profile. Did you score higher than 16 on any style? If so, you probably prefer to use this style whenever you can. Did you score below 10 on any styles? These are probably leadership styles that you do not use often. Some people have one clearly dominant style. Those people generally use that style to the exclusion of others.



Others may use a variety of styles. They would have a relatively even distribution of points in their Leadership Style Profiles.

### **Is There a Best Leadership Style?**

In a word, no. Current theory suggests that different situations require different leadership styles. In fact, the most important take-away from this assessment is this: *The most effective leaders are the ones who adapt their styles to the requirements of the situation.*

### **Too Much of a Good Thing?**

You probably find yourself most comfortable leading others in those situations in which your dominant style is most effective. But sometimes you may need to move outside of your comfort zone so that you can adapt your style to the demands of a situation. Each style has definite strengths. However, some strengths, when taken to an extreme, can become weaknesses.

#### **Direct**

Direct leaders, when stressed, may cross the line from taking charge to being overbearing.

Direct leaders, like to get things done quickly, which is usually a plus. However, if some of their followers work at a slower pace, they may feel pressured by their direct leader's drive. In addition, direct leader's sensed of urgency may cause them to be reluctant to delegate.

Direct leaders like to compete, which may give their organizations an edge over others. However, taken to extremes, their competitive spirit may intimidate those they lead.

Direct leaders work hard. But when they expect the same high-octane performance from those they lead, they may cause their followers to burn out.

#### **Systematic**

Systematic leaders provide structure for activities, which usually helps tasks or projects progress without a hitch. However, when systematic leaders impose too much structure, their followers may chafe under so much control.

Systematic leaders make sure that no one overlooks the important details. But taken to the extreme, their conscientiousness may make the people they lead feel bogged down.

Systematic leaders make sure that all the data is in before making decisions, which is usually a sound policy. However, when urgent situations call for quick action, systematic leaders' thoroughness may be counterproductive.

Systematic leaders insist on objectivity and accuracy above all else. As a result, those they lead may view them as impersonal or picky.

#### **Spirited**

Spirited leaders are good at generating enthusiasm among their followers. Yet taken to an extreme, their persuasive abilities may become manipulative.

Spirited leaders know how to prompt those they lead to develop fresh new approaches. However, their emphasis on thinking of new ways to do things sometimes comes at the expense of making sure that things are carried through to completion.

Spirited leaders inspire their followers by providing them with a vision. But in presenting the big picture, they may sometimes gloss over the important details.

Spirited leaders enjoy motivating their followers from center stage, but sometimes they forget that they also need to provide their followers with an audience, by listening to them.

### **Considerate**

Considerate leaders provide their followers with a sense of reassurance when times are difficult or rapidly changing. However, their desire to keep things comfortable by keeping them the same may cause them to resist change, rather than helping their followers adapt to it.

Considerate leaders build a loyal following by demonstrating their support for others. However, some of their followers may view their support as permissiveness.

Considerate leaders recognize the importance of taking their followers' views into account. But taken to an extreme, their willingness to accommodate others' views may cause them to cave in or appear to cave in.

Considerate leaders are good at maintaining team harmony, but, in some cases, their desire to maintain harmony may cause them to avoid constructive conflict.

### **Action Planning**

Now that you have identified your own leadership style, how can you put it to work? Use the following questions to guide your planning.

1. Based on the information you obtained from this assessment, what do you view as your personal strengths as a leader?
2. What are your areas for improvement as a leader?
3. Think of a specific situation in which you will need to influence others to accomplish a goal. What strengths can you use to your advantage? How do you plan to adapt your leadership style to meet the requirements of the situations?

## Identifying a Winning Issue

**A winning issue is widely felt, deeply felt, and winnable.**

| <i>Issue 1</i> | <i>Issue 2</i> | <i>Issue 3</i> | <b>Will the Issue:</b>                                                                                             |
|----------------|----------------|----------------|--------------------------------------------------------------------------------------------------------------------|
|                |                |                | 1. Result in a real improvement in the lives of students, school staff, and community members                      |
|                |                |                | 2. Give people a sense of their own strength                                                                       |
|                |                |                | 3. Alter the relationships of power                                                                                |
|                |                |                | 4. Be worthwhile                                                                                                   |
|                |                |                | 5. Be winnable                                                                                                     |
|                |                |                | 6. Be widely and deeply felt                                                                                       |
|                |                |                | 7. Be easy to understand                                                                                           |
|                |                |                | 8. Identify the decision-maker                                                                                     |
|                |                |                | 9. Have a timeline that works for your group                                                                       |
|                |                |                | 10. Not be divisive                                                                                                |
|                |                |                | 11. Build leadership                                                                                               |
|                |                |                | 12. Be consistent with the group's values and vision in support of public education and public education employees |

# Power Analysis

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**“Pay attention to the puppeteer, not the puppet.” -Dave Rathke**

## **Steps**

1. Define the major issue or problem.
2. Identify our solution/goal.
3. Identify the key decision makers (primary and secondary). What do we know about them? What do they care about?
4. Identify our allies or potential allies. What do we know about them? What do they care about?
5. Identify our opposition. What do we know about them? What do they care about?
6. Map the decision makers (primary and secondary), allies and opposition on the power grid based on their position/support of our issue and their degree of influence on our issue/goal.
7. Use the map to develop a strategy to achieve our goal. Analyze what the decision makers care about and what will move the decision makers to support our goal. Who should we engage that will positively influence the decision maker on our goal (allies)? Who do we need to neutralize that may negatively influence the decision maker on our goal (opponents)?

**Our Campaign Goal/Objective**

**10** Decisive decision-making power

**8** Has influence on decision-making

**6** Taken into account

**4** Can get attention

**3** Ignored

**1** Actively disregarded

Die Hard Support

Support

Inclined Towards

Neutral

Inclined Against

Oppose

Die Hard Oppose

Last updated 6/26/2019