



LGBTQ+ Strength and Power Building from Clubs to Fighting Unions



Participant Handouts

Participants will develop the skills and learn the methods of identifying, developing, and supporting leadership in winning campaigns. They will work in teams with colleagues to plan, evaluate, and discuss leaders, leadership, and structures that build power.

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Community Agreements for Our Time

Awareness and Self-Knowledge

This requires self-knowledge and self-awareness. Self-knowledge allows you to see what causes you pain and conflict and enables you to embrace your contradictions and inconsistencies. It allows the space to work on things about yourself that you are not happy with. In turn, self-awareness helps to prevent you from projecting your negative aspects onto other people. Bringing your best self also requires that you have a positive attitude, are willing to deeply explore your perspectives and remain open to the perspectives and experiences of others. While engaging with peers and content, make space for others to engage as well.

Listening for Understanding

Be an active listener. Active listening involves paying full and careful attention to the other person, looking them in the eye, avoiding interruptions, reflecting your understanding, clarifying information, summarizing the other person's perspectives and sharing your own. Remember that most people need time to open up and might not be willing to immediately share their personal stories, hopes, fears and/or concerns.

Being Gracious

Being kind is a vital way of bringing meaning to our own lives, as well as the lives of others. Kindness is about caring genuinely for others around you, wanting the best for them and recognizing in them the same wants, needs, aspirations and even fears that you may have. Being kind and generous allows us to communicate better with others, to be more self-compassionate and to be a positive force in other people's lives. We are gracious when we accept and genuinely work to use the pronouns that others ask us to use. Being gracious includes following the COVID protocols that are in place to protect the health of this learning community.

Staying Engaged

Staying engaged requires you to be morally, emotionally, intellectually and socially involved in the conversation. Staying engaged means that you are listening with curiosity and willing to deepen your understanding. Staying engaged might also require you to sustain the conversation even when it gets uncomfortable or diverted. This means a commitment to keeping your electronic communications to a minimum with folks not present in this learning community. This also means being present for all portions of the learning agenda.

Being Open and Suspending Judgment

Listening with an open mind includes being receptive to the influence of others. You can suspend judgment by becoming aware of preconceived notions and listening to everything someone has to say before jumping to conclusions. Most importantly, suspending judgment also means listening to what the speaker has to say for understanding, not just to determine whether the speaker is right or wrong. This means that we recognize each of us will make mistakes and that we have the capacity to grow. We should expect imperfections.

Saying "I" - tell your truth

Speaking your truth in authentic and courageous conversations about race and other issues where experiences/perspectives may differ widely from yours requires a willingness to take risks. It means that you will be absolutely honest and candid about your own thoughts, feelings, experiences and opinions and not just saying what you perceive others want to hear. Speaking your truth will require you to speak from the "first person" and use "I" statements.

Lean into Discomfort

Leaning into discomfort will require you to let go of understandings and stereotypes that you may be holding onto in order to move forward. Leaning in means that you will avoid pre-judgment and be open to the kernel of wisdom in each individual's experiences. Leaning into discomfort will require you to sit through moments of embarrassment, confusion, anxiety, and/or fear.

Reaching Empathy

Empathy and compassion allow you to understand the other person's point of view. When you are empathetic, you are more understanding, patient and kind. Expanding your capacity to feel empathy will also allow others to enter your circle of human concern. Sharing, using, and respecting pronouns is a very simple form of empathy.

Expecting Non-Resolution and Non-Closure

Expect and accept that there may not be closure. It is not likely that you will resolve your personal understanding about race or another person's racial experience in a single conversation. The more you talk about race or other issues with another person, the more you learn and the more they will learn. Authentic and productive conversations about race and other issues where experiences/perspectives may differ widely from yours are continuous and always evolving. This means that sometimes we will have unfinished, unexplored, and shortened conversations about some concepts.

**Adapted from "Embracing equity and inclusion", Annie E. Casey Foundation*

What questions do you want to ask about any of the ideas in these agreements?

What additional agreements do you need in order to be a fully participating member of our learning community?

Can you commit to these agreements? If not, what would it take for you to be able to commit?

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.

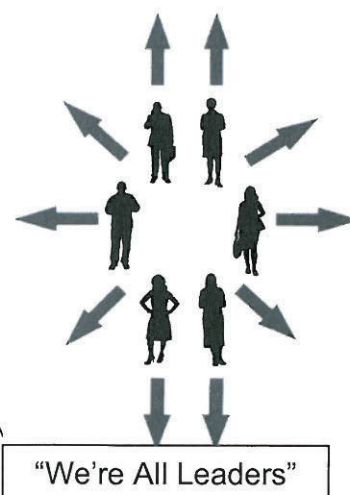
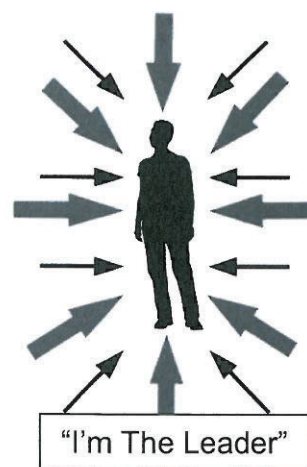
But what does it feel like to be the "leader" in the middle? What does it feel like to be the arrow that can't get through? What happens if the "leader" in the middle drops out?

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



Three Theories of Change

Organizing, Mobilizing, and Advocacy

BY ELENI SCHIRMER

Why have unions gotten so weak, and how can they strengthen? In her book *No Shortcuts: Organizing for Power in the New Gilded Age* (Oxford, 2016), labor organizer and strategist Jane McAlevey argues that a major factor in labor's decline has been that unions have abandoned the work of organizing, relying instead on the more superficial methods of building power, namely mobilizing and advocacy. What are these three different methods of union strength, and what path toward power does each build?

To organize is to build mass support and strength among ordinary people. Organizing draws its power from working people's biggest strength: our numbers. Working people may or may not see themselves as activists or politically active or even in political agreement, but through organizing, they come together to act in common cause. The work of organizing is systematic and rigorous: It requires connecting with every single worker in a shop, every educator in a building, every building in a district. At its core, it asks people to understand their own agency and to make choices about how they will exercise it. The work of organizing is difficult; ordinary people are seldom confronted by their own agency nor asked to make choices that recognize their own power. As McAlevey notes in her first book, *Raising Expectations (and Raising Hell): My Decade Fighting for the Labor Movement* (Verso, 2012), a memoir of her organizing work: "In the normal course of human events, workers don't expect much from their jobs, government, or unions, because the reality is they don't get much. The job of the organizer is to fundamentally change this." The work of organizing is difficult, but as McAlevey argues, it is essential: There are no shortcuts.

Mobilizing, by contrast, activates an already-convinced membership. Mobilizing encourages those who already support a cause or a mission to take action to defend their belief—for example, by attending a protest, wearing a button, or signing a petition. Mobilizing is a very important step for building movements, but it is not the same thing as organizing. The crucial difference between mobilizing and organizing is that mobilizing relies on the actions of people who have already been brought on board; organizing is the work bringing ever more people on board, having a stake in the direction and outcomes of the actions (mobilizing can be an important component of organizing). McAlevey distinguishes mobilizing as



BRIAN STAUFFER

relying on the participation of a “self-selecting” group—people who have chosen to participate in something due to personal preferences or beliefs, such as environmental protection groups, the ACLU, or Planned Parenthood. Organizing, by contrast, relies on “structure-based” groups, groups determined by a predefined, often structural, relationship, such as working for the same employer, living in the same housing complex, or attending the same place of worship. Membership in a structure-based group, unlike a self-selecting group, is not a result of personal

affinity. In a structure-based group, the number of possible members—and therefore people to organize—is finite and knowable: the number of workers in a firm, residents in a housing building, or members in a church, for example. Whereas mobilizing relies on participation from a self-selecting group, organizing builds high participation among all eligible individuals.

Advocacy is the work of creating change through the actions of professionals or technical experts—lobbyists, pollsters, lawyers, communication specialists, researchers. Advocacy relies on the expertise, status, and know-how of these groups of people to make change. Advocacy usually happens in a closed-door room; ordinary people play a small to nonexistent role in its efficacy. Advocacy has become a dominant strategy for unions and liberals. But its efficiency comes at a cost; it disables the masses of ordinary people who have a stake in the issues under scrutiny by advocates.

These three forms of making change do not exist in isolation; a successful campaign may very well rely on all three strategies. Yet organizing, McAlevey argues, is the most fundamental: The base of any campaign should come from its organizational capacity above all. Yet in reality, according to McAlevey, it's often the strategy most avoided or shortchanged. After all, it is often hard, slow work that requires building connections with mass numbers of people. As a result, it's often sidestepped for quicker grabs for power—mobilizing or advocating support, rather than organizing for it.

McAlevey's framework rests on a more fundamental argument about power. In an age of massive inequality, many see power as the province of the elite—the small, powerful minority who run the courts, the banks, and the media in the U.S. and around the world. From this perspective, forging change is the process of altering who occupies those powerful institutions: voting in new leaders, appointing new judges, securing better regulators who can safeguard the system with an eye toward fairness. In McAlevey's words, this belief is little more than replacing one set of elites with another, better set of elites. It relies on advocacy and, to a certain extent, mobilizing to get the job done.

Yet exclusively focusing on the undemocratic hyper-concentration of elites obscures the power of ordinary people. Ordinary people have two major forms of power: our numbers—there are more of us than them—and our ability to withhold our participation in a system that denies us fairness, dignity, and health: They need us to keep working. Organizing, especially organizing with an eye toward building strikes, activates both forms of power. Successful labor movements and social movements often use a combination of advocacy, mobilizing, and organizing. But as McAlevey argues, organizing is the most important of those tasks—yet often the most overlooked. Her work aims to bring the movement back into labor, and winning back into the movement. 📖

Eleni Schirmer reads, writes, and teaches about labor movements and education. She has a PhD in Educational Policy Studies from the University of Wisconsin–Madison.

	ADVOCACY	MOBILIZING	ORGANIZING
Theory of Power	Elite. Advocacy groups tend to seek one-time wins or narrow policy changes, often through courts or backroom negotiations that do not permanently alter the relations of power. ☐	Primarily elites. Staff or activists set goals with low to medium concession costs or, more typically, set an ambitious goal and declare a win, even when the “win” has no, or only weak, enforcement provisions. Backroom, secret deal making by paid professionals is common. ☐	Mass, inclusive, and collective. Organizing groups transform the power structure to favor constituents and diminish the power of their opposition. Specific campaigns fit into a larger power-building strategy. They prioritize power analysis, involve ordinary people in it, and decipher the often hidden relationship between economic, social, and political power. Settlement typically comes from mass negotiations with large numbers involved. ☐
Strategy	Litigation; heavy spending on polling, advertising, and other paid media. ☐	Campaigns, run by professional staff, or volunteer activists with no base of actual, measurable supporters, that prioritize frames and messaging over base power. Staff-selected “authentic messengers” represent the constituency to the media and policymakers, but they have little or no real say in strategy or running the campaign. ☐	Recruitment and involvement of specific, large numbers of people whose power is derived from their ability to withdraw labor or other cooperation from those who rely on them. Majority strikes, sustained and strategic nonviolent direct action, electoral majorities. Frames matter, but the numbers involved are sufficiently compelling to create a significant earned media strategy. Mobilizing is seen as a tactic, not a strategy. ☐
People Focus	None	Grassroots activists. People already committed to the cause, who show up over and over. When they burn out, new, also previously committed activists are recruited. And so on. Social media are over-relied on. ☐	Organic leaders. The base is expanded through developing the skills of organic leaders who are key influencers of the constituency, and who can then, independent of staff, recruit new people never before involved. Individual, face-to-face interactions are key. ☐

Reprinted with permission of Jane McAlevey from her book No Shortcuts: Organizing for Power in the New Gilded Age (Oxford University Press, reprint edition: April 1, 2018).

Organizing Notes

Structuring Leadership

What Is Leadership?

“Leadership is accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty”

Many of us call to mind historic figures like Dr. Martin Luther King, Nelson Mandela, Jane Addams, Robert Kennedy or President Reagan. In reality, we find leadership everywhere - linking together networks through which we work to achieve common purposes. In every community, church, classroom, and organization hundreds of people are doing the work of leadership without which these efforts would not survive.

So what do leaders do that makes them leaders? They accept the responsibility for working with others to define desired outcomes and achieve them in an uncertain world. When we know what to do, when there are no surprises, no new challenges to face, and we're following a routine, what need do we have of leadership? It's when we enter the domain where the rules don't quite work, where we don't know which rules apply, where we're trying to do something that hasn't been done before – or that we haven't done before - that's when leadership enters the picture.

Leadership as Relationship

Relationships are the foundation of organizing, including the exercise of leadership. James McGregor Burns argues leadership relationships emerge through repeated “exchanges” or “transactions” among leaders and followers or constituents.¹ Leaders offer resources constituents need to address their interests and constituents offer resources leaders need to address theirs in turn. These relationships may form between individuals, a team, a group, a community, or even a constituency enabled to work together effectively.

What do we exchange in this kind of relationship? Constituents may get a sense of empowerment, access to resources, help solving a problem, etc. Leaders may get the same things - and they get something that is worth accepting the responsibilities that come with

¹ J. M. Burns (1978). Leadership. (New York, Harper and Row).

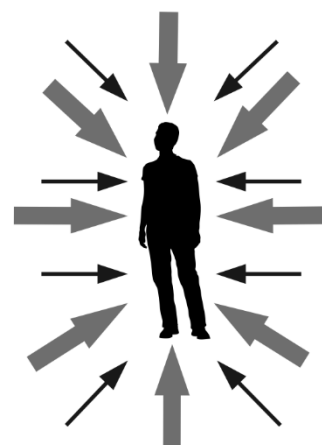
leadership. Dr. King describes this as the “drum major instinct” - a desire to be first, to be recognized, and even to be praised. As much as we may not want to admit it, this might sound familiar. Rather than condemn it - it is, after all, part of us - Dr. King argues it can be a good thing, depending on what we do to earn the recognition we seek. He quotes Jesus as saying to James and John, “if you want to be my disciples you not only “can” be first, you must be first - first in love and first in service.”²

With this view of leadership, who makes leaders? Can they be self-anointed? Can I decide one day that I am a leader? Or must I earn leadership by entering into relationships with those who enable my exercise of it? This makes it easy to recognize. There is a simple test. Is there a constituency? Fine speeches, a wonderful appearance, lovely awards and excellent work aside - no constituency, no leadership.

Leadership and Structure

Many of us may not want to think of ourselves as followers or as leaders for that matter. Often we are told, especially in elite institutions, that we are all leaders...or we should be. Leadership is highly praised, but no one says anything about good constituents, collaborators...or citizens. But organizations that depend on collective action can be effective only if people learn to practice good leadership and followership. Leading and following are not expressions of who we “are” but of what we “do” – in this meeting, committee, project, organization, or institution. We may play a leadership role with respect to one project and followership role with respect to another.

What are the differences in those roles? Most importantly, leaders accept responsibility for a “whole” – a whole team, a whole project, a whole job – while others accept responsibility for a “part” of the whole. Leaders accept responsibility for seeing to the work that a group must do to work together successfully.

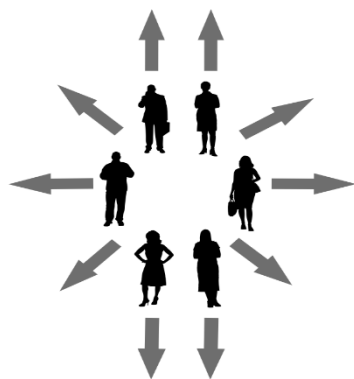


“I’m The Leader”

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.

² Martin Luther King, J., (1986 (1991)), The Drum-Major Instinct (4 February 1968). A Testament of Hope: The essential writings and speeches of Martin Luther King, Jr., (New York, HarperCollins) 259-267.

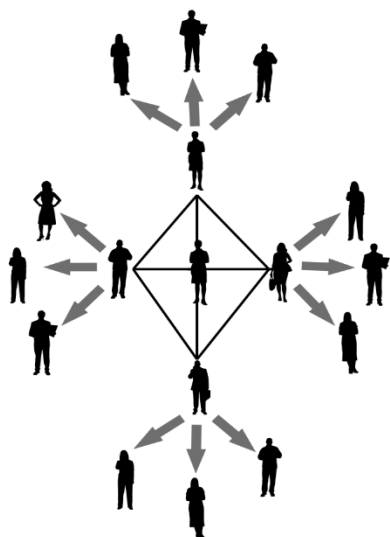
But what does it feel like to be the “leader” in the middle? What does it feel like to be the arrow that can’t get through? What happens if the “leader” in the middle drops out?



“We’re All Leaders”

On the other hand, some of us question the whole concept of leadership. Shouldn’t everyone be considered a leader? Is leadership really necessary? Isn’t it repressively hierarchical? Why do we need this kind of structure at all? Can’t we just “come together”? 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?

In her *Tyranny of Structurelessness*, feminist sociologist Jo Freeman argues that organization (or collaboration of any kind) simply doesn’t work if we don’t have ways to assign clear responsibilities and hold ourselves accountable for fulfilling them.³ The idea of a structureless group, she writes, “becomes a smokescreen for the strong or the lucky to establish unquestioned hegemony over others.” And, “for everyone to have the opportunity to be involved in a given group and to participate in its activities the structure must be explicit, not implicit.”



Snowflake/
Interdependent Leadership

A third option is an interdependent leadership team in which individuals can bring complementary strengths to bear on solving a common problem. On the one hand, leadership doesn’t rest on one person. On the other hand, it is clear where responsibility for leadership does rest. Effective leadership doesn’t imply domination but rests on interdependence and collaboration to create more “power to,” based on the interests of all parties. Domination is the exercise of “power over,” a relationship that meets interests of the “power wielder” at the expense of everyone else.

An organizer’s job is to reach out and find leadership from within his or her constituency who can recruit and coordinate others. They may not be people others usually see as

³ J. Freeman, (1970), "The Tyranny of Structurelessness." [Women's liberation movement, USA.](#)

leaders, but they are people committed to change, willing to invite others to join them in the hard work of moving a campaign forward.

These leaders will be the backbone of your organizing campaign. You must be able to trust them to delegate responsibility to other dedicated, reliable people, and to follow through on commitments. You may be the leader in the middle, or part of a leadership team in the middle, guiding others' efforts and being held accountable for outcomes, but you will be deeply reliant on your relationships with others for success.

Leadership and Authority

We are wise to distinguish “authority” from “leadership.” Authority is a “legitimacy” of command usually attached to social positions, offices, or roles - legitimacy supported by cultural beliefs as well as coercive resources. An organization is a way to formalize authority relations among the participants – people’s rights and their obligations. Bureaucracies structure authority as a set of rules according to which manager’s direct subordinates. Markets structure authority as a set of rules according to which people make enforceable contracts based on their individual resources. Civic associations usually structure authority democratically in that leaders are accountable to the constituents whom they serve. Exercising leadership in a civic context can require more skill than other settings because it depends more on persuasion than on command.

Most of us have been in situations in which those with authority have not earned their leadership, but try to compel cooperation based solely on their legitimacy or “power over”. In these circumstances, to what extent do we think our interests are acknowledged and addressed? How does this affect our motivation and performance?

Cultures have institutionalized beliefs about who is “authorized” to lead and who isn’t that can bar certain “kinds” of people from the opportunity to earn leadership. Leaders who develop under these conditions constitute a challenge to conventional ideas of authority. Authority can also be a resource a person can draw upon to earn their leadership. And sometimes leaders find authority has been conferred upon them as a result of their having earned their leadership. But leadership and authority is not the same thing.

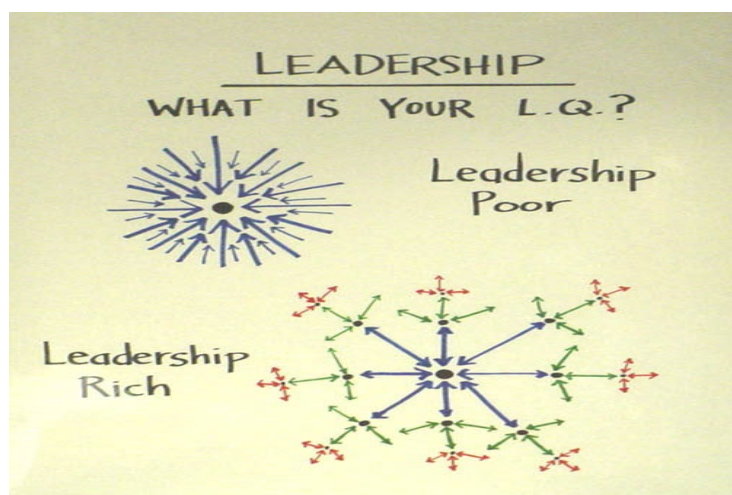
Finally, we can distinguish leaders from “activists.” Hard working activists show up every day to staff the phone bank, pass out leaflets, and put up posters, and make critical contributions to the work of any volunteer organization. This is not the same, however, as engaging others in doing the work of the organization.

Leadership Development Letting Others Lead

So if leadership is so important to organizations, how can organizations make sure they have the leaders needed to accomplish its mission? Organized people empower themselves to make lots of things happen less by the efficiency of their systems than by the depth of their leadership capacity. This is particularly true of civic associations that bring people together, facilitate understanding one another, and enable them to act together on common interests.

Take a look at the “leadership quotient” of your organization. How many leaders do you see doing leadership work? Is there one “leader” with everyone else linked to that leader like spokes to the hub of a wheel? Or are there lots of “leaders” linked with each other and with other members, multiple centers of coordination, inspiration and action. Are some people “followers” in relation to some “leaders” but “leaders” in relation to other “followers”? Or are some people always “leaders” and others always “followers”? Is it "leadership rich" or is it "leadership poor"?

Chart #1



Giving Up Control to Build Power Leadership Team or “Lone Ranger”

So why aren’t “leadership rich” organizations an everyday thing? Why is it that so often we wind up the dot in the middle of all the arrows? How can we build a “leadership rich” organization?

It's not a new problem. As recounted in Exodus, Moses required the intervention of his father-in-law Jethro, who had his own interest in the matter to begin getting the picture.⁴ He was trying to do it all himself, but why? Because he was hungry for the power? Because he needed to keep himself busy? A more likely explanation is that, like many of us, he wanted it done right, and he thought that meant that he had to do it himself. But as long as he was trying to do it all himself, it couldn't be done well, much would not get done at all. The belief that holding onto all the control would ensure all was done well was an illusion. So Jethro offered him a way out. Find the courage to let go of some of the control and risk letting others share in the responsibility for leading. But not just anyone – he urged him to find people with leadership potential, people who were “capable, God-fearing, and honest”.

As important as how we structure our organization is, nothing is more important than coming to terms with this fundamental question: are we willing, and able, to let go of enough control to let others lead? Can we let go of enough control to allow our organization to build the power that can only be achieved by letting it grow leadership rich?

Successful organizers form leadership teams with whom they can work early on in their campaign. Although it can be a mistake to recruit people to act as an "organizing committee" too early - especially if you are not careful to recruit people drawn from the constituency who are not seen as leaders or, at least, potential leaders - organizers more often err in delaying too long. The sooner you have a team of people with whom to work, the sooner the "I" of the organizer becomes the "we" of a new organization. Once you have formed a leadership team you can more easily establish a rhythm of regular meetings, clear decisions and visible accountability that will help make things actually happen. You don't build an organization of 500 people by recruiting them all yourself. You build it by finding people willing and able to commit to help building it with you. If you don't have a leadership team working with you by midterm, it's time to look very closely at why.

Despite the “alpha” mythology, most effective leaders have always led through teams. Moses, Aaron and Miriam, for example, in the Exodus story or Jesus and His twelve disciples in the New Testament, or Martin Luther King, Ralph Abernathy, Rosa Parks, Jo Ann Robinson and E D Nixon during the Montgomery Bus Boycott.

⁴ The Bible, Exodus 18.

Structuring a leadership team is a way to organize interdependent leadership – individuals working together to achieve a common outcome, like an athletic team, each person responsible for coaching the team on a different activity. Well-designed teams put to productive use the unique talents of the individuals who make up the team.

Structuring a leadership team creates strategic capacity: the ability to strategize creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. In the Obama campaign, the field structure created multiple layers of leadership teams to engage people creatively and strategically at all levels of the campaign. Each state had a state leadership team that coordinated regional leadership teams (of Regional Directors and Organizers), which coordinated local neighborhood leadership teams of volunteer leaders. At every level the people on leadership teams had a clear mission and could strategize creatively together about how to carry out their mission. This structure created multiple points of entry for volunteers, and multiple opportunities to learn and exercise leadership.

So why don't people always work in teams?

We have all been part of groups that did not work well. They factionalize, alienate each other, or all the work falls on one person. Some aim to keep the pond small so they can feel like big fish. So many of us conclude: I'll just do it on my own; I hate meetings, just tell me what to do; I don't want any responsibility; just give me stamps to lick. For example:

- You are in a team meeting. You find that it's never clear exactly whom you can count on to step up, take responsibility, and get the work done. So two or three people often wind up doing all the work, which means that no matter how hard we work, it still can't get done.
- Whenever we need to make a decision we always seem to be missing some crucial piece of information, skill, or set of relationships.
- We talk and talk and talk, but, when it's all over, we realized that we each had a different idea of the outcome we were talking about.
- When we get stuck, we have nowhere else to turn for help. We help each other as much as we can, we may contact another volunteer leader, but it's not clear where we can go for expert advice.

There's just one problem: we can't become powerful enough to do what we need to do if we can't even work together as a leadership team. But you can create the conditions that will increase the odds your team will work drawing on the craft of team design.

Three Outcomes of an Effective Team

- *The team accomplishes the goals for which it is responsible.*
- *The team is operating in ways that make it better as a performing unit over time*
- *The team contributes the learning and well-being of individual members*

Three Conditions for an Effective Team

These are conditions that you as an organizer are able to create in the way you design your leadership team: who is selected, what is required, what expectations you establish, etc.

- *Your team is bounded.* It is clear who is on the team and who is not on the team. It is clear how new people can join the team and what is expected of those who must leave the team.
- *Your team is stable.* People commit to clear terms of service: regular meetings, length of time, etc. Your team is not a revolving door, never knowing who will show up.
- *Your team is diverse.* Your team has the appropriate diversity of skills, talents, viewpoints, and constituencies that will be needed to do a good job.

Three Steps in Launching an Effective Team

These are three decisions that a leadership team must make at the very beginning to put itself on a constructive path. There are no "right" answers as to what these decisions must be, only that they must be made to give the team the structure it will need to do whatever it wants to do well.

- *Establish a shared purpose.* You do the work, based on your shared values and the relationships you have formed, to clearly articulate your common purpose as a team. It is clear, challenging, and matters. You have defined your goal, whom you work with, and the kinds of things you will do?
- *Establish clear ground rules or norms.* Your team sets explicit expectations of how you will work together: how you will make decisions, manage your time, and honor your commitments. What are things you will always do and what are the things you will never do. And how will you correct yourselves if you do them. Perhaps your most important norm is how you will make decisions. Steps that can guide effective decision making are: defining the problem, establishing criteria, brainstorming possibilities, synthesizing ideas, formulating options, evaluation options against the criteria, deciding. Some prefer deciding by vote; others, by consensus; others by delegating the decision to an individual.
- *Organize the work into interdependent roles.* Everyone should have responsibility for their own share of the leadership work needed to achieve the goal. Role requirements need to be clearly described. Team members need to assess their strengths and limitations, to the greatest extent possible, matching individual capabilities with role requirements. Because roles are designed to be interdependent, everyone has a stake in everyone else's success. Team members speak up when they need help and get it. No one works in a silo that's secretive to others. The team with diverse identities, experiences and resources brings more to the table than a team that is very homogeneous.

***Leadership Development Cycle:
Identify, Recruit, Develop***

Leadership development work occurs as a cycle, as shown in Chart #6: identifying potential leaders (opportunities for them to emerge), recruiting them into leadership positions (opportunities for leadership to be earned), and creating opportunities for them to develop their capacity (opportunities for leaders to grow) on an ongoing basis. It requires learning how to delegate - and mean it; creating a supportive organizational structure; and providing coaching.

Identifying leadership requires looking for it. Who are people with followers? Who brings others to the meetings? Who encourages others to participate? Who attracts others to work

with them? Who do other people tell you to “look for??” Alinsky writes about community networks knit together by “native” leaders - people who take the responsibility for helping a community do its work out of their homes, small businesses, neighborhood hangouts, etc. They can be found coaching athletic teams, organizing little leagues, serving in their churches, and surfacing in other informal “schools” of leadership. Where would you look for these kinds of leaders around here?

Although leading is a matter of “doing” and not “being” – and people do leadership work in different ways - there are some clues you may want to attend to, especially when looking for people that will make good organizers. It is hard for a person who has not learned to be a *good listener* to become a good organizer. You have to understand the interests of your constituency if you are to help them act on those interests. Listening means learning to attend to feelings - *empathy* - as well as to ideas because the way we feel about things affects our actions more than what we think about them. *Curiosity* helps us see the novel as interesting rather than threatening, enabling us to learn how to face new challenges that are always a part of organizational life. A good *imagination* helps because strategizing is a matter of imagining different futures and possible ways to get to them. A sense of *humor* helps you from taking yourself and your troubles too seriously and helps keep things in perspective. A *healthy ego* is very important. Arrogance and a wish to dominate others are usually signs of a weak ego constantly in need of reassurance. Leadership also requires *courage* - the willingness to take risks, make choices, and accept the consequences.

Recruiting leadership requires giving people an opportunity to earn leadership. Since followers create leaders, they can’t appoint themselves and you can’t appoint them. What you can do is create opportunities for people to accept the responsibilities of leadership and support them in learning how to fulfill these responsibilities. If you have to get the word out for a meeting, you can get three of your friends to help you pass out leaflets in the Yard one day or you can find one or two people in each House who will take responsibility for recruiting 5 people from their House to attend. They earn their leadership by bringing the people to the meeting. What other ways can you think of that you can give people the opportunity to earn leadership?

No matter how careful you are, leadership development requires coming to terms with the fact that it entails risk. Risk small failures early in the life of a project in order to avoid big failures later on. If you take the risks required to learn to delegate, you will learn how to do it and you will learn who “comes through” and who doesn’t. It is important to learn this with a small meeting at stake and not the monster rally of 5000 at which only 50 people show up. One reason to set up quantifiable goals, regular reports, and ongoing evaluation is to detect early failure and

success so they become "learning opportunities" for everyone. "So, Mary, why did that work so well?" "So, Sam, what happened there? What could you have done differently?" Don't assume everyone is going to do everything right from the very beginning because it never happens. Also, it is often not completely clear what the "right" way is at the beginning of a project. Think about how to turn this fact to your advantage. Where can you get the courage to take the risk of letting other people share in the responsibility for outcomes you care about?

We only develop good judgment about whom to select by taking risks, making choices, experiencing success and failures, and learning from this experience - and we will still be surprised. On the other hand, the more experienced we are the better judgment we can begin to develop. There is no "rule book" to go to on this, but if you are afraid to risk making choices, you never learn to make good choices. Here are some questions you might ask yourself. How do you select to whom to delegate? How do you know who the right person is? How can you find out ahead of time? How do you know when a person is ready for a big job? Are you selecting them because they are easily available or because they are the right people for the job? Are you selecting them because they already know what to do because you have worked together before or because they "look as if they can learn what to do" with some good coaching? Or did you select them because you "heard" they were good? Where did you hear that? Who told you? Should you believe them? How do you know?

Developing leadership requires structuring the work of the organization so it affords as many people as possible the opportunity to learn to lead - *delegation*. Distributing the leaflets through House Committees, for example, shares the responsibility for engaging others with many people. It is true organizing the work in this way can be risky. You may delegate to the wrong people; they may let you down; etc. But as Moses learned from Jethro, if you fear delegating, the strength of the community is stifled and can never grow. But you can do things to increase the chances of success. Leadership training sessions help clarify what is expected of leaders in your organization, give people the confidence to accept leadership responsibilities, and express the value your organization places on leadership development.

Developing leaders is not about assigning tasks, but offering responsibility. It is different to ask: "would you make these 50 phone calls telling people about the meeting?" versus "would you take responsibility for getting 10 people to come to the meeting? You will? Great! Here's some things that may help you contact them and get them there -- a list of names and phone numbers of people who said they were interested, 100 leaflets, some posters, and some sign-up sheets you could use to get commits." Do you see the difference? With the "task," the person can become a kind of yo-yo: go do this, come back for what's next, go do that, come back for

what's next. They are "helping" you with your responsibility. With a "responsibility," the person takes it and runs with it, and you can help them meet "their" responsibility. But when looking for someone to take responsibility, don't make the responsibility easier, and easier, and easier...until there's nothing left. The challenge is in learning to motivate people to accept the level of responsibility needed to get the job done. And when a person has accepted responsibility, the motivation work continues. Keeping others motivated, keeping yourself motivated, and getting the work done go together. All are based on real accountability, lots of coaching, and lots of recognition of success.

Responsibility is only real, however, if the person is clearly accountable for the responsibility he or she accepted. Accountability should be regular, specific, and timely. The point of accountability is not to catch someone to punish them, but to learn what kind of results they are getting so everyone can learn from them. If someone is having trouble, we need to learn why so we can figure out what to do about it. If someone is being successful, we need to learn why so we can try the same thing in other places. Without accountability the most important learning we can do in the course of a campaign - systematic reflection on our own experience - is impossible. You cannot expect a person to take responsibility without authority. If you want someone to take the responsibility to get 10 people to a meeting, hold them accountable, provide training, offer support - but give them the authority to do what they've been asked to do. If you see or hear of them making a mistake - or think you can do it better - this means going directly to them, not around them or taking care of it for them. It is really a matter of basic respect.

Chart #2



Leadership as Coaching and Coaching Leadership

Once a person accepts responsibility, it is in your interest to offer her as much support as she wants to ensure her success. The challenge is learning how to offer support without taking back the responsibility. “Oh, you’ll get the ten people to come? Great! Let’s sit down for a few minutes and “role play” just what you’re going to say to them.” Or “give me a call to tell me how it's going - or if you run into problems.” A regular coaching session means you want to meet not because you think they are in trouble, but because you are interested in their work. These sessions can be very useful for learning what's really going on out there as well. And coaching is, of course, one of the best ways to make mentoring real.

The Hackman and Wageman article on team coaching is particularly useful in focusing on how to coach a leadership team, not only individuals, with sensitivity to the timing issues involved in a campaign type of project. Ongoing support for leadership development comes more and more to be in the form of leadership team coaching and teams themselves become more typical of how organizational life is being structured. And as more activity is outcome focused, rather than process focused, the more time issues will become critical. So learning how to coach multiple people within a changing time dynamic is will be critical for your success as an organizer.

Conclusion

Although identifying, recruiting and developing leaders is critical to the capacity - or power - of most organizations, it is the particular focus of organizers whose work is to be leaders of leaders. The primary responsibility of an organizer is to develop the leadership capacities of others and, in this way, of the organizations through which their constituents act on their common interests.



Ella Baker's Legacy: A Different Model of Leadership

As a community organizer, Ella Baker brought a different style of leadership to the civil rights movement—one that contrasted with the traditional model that celebrated a few charismatic individuals. Baker believed in deemphasizing top organizational figureheads and instead cultivating the abilities of everyday people to collectively join together and take action. She upheld the idea that organizations should be run by those most impacted by the problems the organization is trying to solve.

In a June 12, 2015 article in Colorlines, Barbara Ransby discussed Baker's approach to leadership:

Although she objected to the top-down, predominately male leadership structures that were typical of groups like the Southern Christian Leadership Council (SCLC) and the NAACP in the 1950s and '60s, she realized the necessity for grounded, community-based leader-organizers such as sharecropper Fannie Lou Hamer and Cleveland, Mississippi-based local organizer Amzie Moore. Baker was not against leadership. She was opposed to hierarchical leadership that disempowered the masses and further privileged the already privileged.

When Oprah Winfrey complained that recent protests against police violence lack leadership, she was describing [Martin Luther King's] style of leading, or at least the way in which the King legacy has been most widely branded: the reverend as the strong, all-knowing, slightly imperfect but still not-like-us type of leader.

Baker represented a different leadership tradition altogether. She combined the generic concept of leadership—“a process of social influence in which a person can enlist the aid and support of others in the accomplishment of a common task”—and a confidence in the wisdom of ordinary people to define their problems and imagine solutions. Baker helped everyday people channel and congeal their collective power to resist oppression and fight for sustainable, transformative change....

That collective effort required leaders who were accountable to one another and were not singular. There were many organizers in groups such as SNCC who modeled Baker's brand of what sociologist Charles Payne has called “group-centered leadership.”

Rather than someone with a fancy title standing at a podium speaking for or to the people, group-centered leaders are at the center of many concentric circles. They strengthen the group, forge consensus and negotiate a way forward. That kind of leadership is impactful, democratic, and, I would argue, more radical and sustainable, than the alternatives.

<https://www.colorlines.com/articles/ella-taught-me-shattering-myth-leaderless-movement>

Another way in which Baker's leadership style contrasted with the norm within many civil rights organizations was her emphasis on valuing the contributions of women. Baker was opinionated and outspoken, even when social norms held that women should be quiet and deferential. At both the SCLC

and NAACP, she protested the fact that formal power rested in the hands of men, who almost exclusively were given top offices, while women were relegated to support roles.

Congressperson John Lewis, himself a prominent civil rights activist, wrote in his memoir *Walking with the Wind*: “Long before people began using the term ‘male chauvinism,’ Ella Baker was describing it and denouncing it in the civil rights movement, and she was right. There were very, very few women getting credit for their work, and even fewer emerged into leadership positions.”

In a January 16, 2017 article for *Time* magazine, journalist Julie Scelfo notes that the prevalence of sexism, even within the movement, may be one reason that Baker is less well-known today than she might be otherwise:

Despite her level of experience and proven track record, [Martin Luther King, Jr.] had difficulty allowing a woman’s decisions to trump his own, and her idea was that the organization should devote its resources more to promoting and enabling its overall mission rather than celebrating a charismatic leader. Wyatt Tee Walker, an early SCLC board member, told the filmmaker Joanne Grant that the ministers’ refusal to follow Baker’s advice was in practice with the era’s norms. “This was before the days of women’s liberation,” he says in the 1981 film [Fundi: The Story of Ella Baker....](#)

Despite Baker’s gifts for leadership and oratory, the SCLC pastors, intent on preserving their patriarchal hierarchy, refused to allow her to share in their prestige.

<https://time.com/4633460/mlk-day-ella-baker/>

Scelfo goes on to discuss another reason why Ella Baker may be less well-known and widely celebrated today than some other civil rights activists:

Baker spent years of her life performing the essential—but far from glamorous—act of listening, a crucial first step in helping beleaguered Blacks develop enough self-worth to demand being treated with dignity in an environment where they had every reason to fear brutality and economic reprisal from their white neighbors. She also understood group dynamics and how to empower people to join forces, a delicate task that involves responding to a wide array of human feelings.

A narrative about this kind of work is inherently less dramatic and far more complicated than, say, the tale of a discreet act of bravery on a bus. But great leaders have recognized for centuries that high emotional intelligence, or the ability to recognize and respond to other people’s feelings, is central to successfully influencing them.

<https://time.com/4633460/mlk-day-ella-baker/>

Baker possessed this type of intelligence and infused it into her approach to organizing. In doing so, she paved the way for many young people and women to grow in their own leadership.

Today, her legacy can be seen in organizations like Black Lives Matter, which promote a “leaderful” and feminist style of organizing. Because of this, Baker not only helped change the world, she changed how people went about changing the world.

Leader Mobilizer Activist Discussion Activity (Adapted from Jane McAlevey 2021)

Based on what's in the scenario only:

1. Who do you identify as the Leader who has moved people the most? Why?
2. Who is the mobilizer – actively working on the behalf of the union and carrying out actions that get others involved? Why?
3. Who is an activist – a pro-union supporter and may take action if asked? Why?
4. The BIG discussion - In what order should you be building relationships with your choices?

Scenario:

You work for a union representing a small college. It has more than 40 buildings, 100 faculty members and 2,600 students. There is only a faculty unit at this college. Support staff are not yet represented. Because of a budget shortfall that happened just before the last negotiations nearly three years ago, there were layoffs, class sizes grew, and the raises barely kept up with inflation. Members weren't happy with the contract settlement and there's been the most turnover of staff since that anyone can remember. The local has a new contract to negotiate starting four months from now. You have just been assigned to this local, and you are trying to figure out how to build a strong local before contract negotiations begin. You've just finished meeting with the former union president who left at the end of the last college year to return to the private sector, and here is what you've learned from talking to her, and a couple others, about potential leaders and other workers who wield influence:

Tina Love is an Associate professor of English in the Arts and Humanities school and has been at the school for seven (7) years. She is well liked and personable. She is always sharing and liking the state affiliate's posts on social media and seems to really like the union. She was recruited to the college by Grow Your Own* and she still participates in this program as a mentor to incoming staff who come from the same program. She knows A LOT of staff through this effort and from the annual incoming cohorts of new staff she helps mentor. She also regularly organizes well-attended happy hours with professors, lecturers, facilities, and adjuncts from across the different buildings at the college. She volunteers with a couple of local community organizations and regularly wears her union button on her jackets.

Destiny Jackson is a Senior Lecturer in the Nanotechnology school and has been there for 10 years. Destiny never publicly supported the union, saying unions are for blue collar workers, not professionals. Once Janus passed, she dropped her membership. She was recently appointed by her Chair to sit on the Academic council, a form of shared governance, with administrators to discuss issues in the school. During a department staff meeting Destiny asked that the position be elected and a majority of the nanotechnology staff voted for her to be on the council. Recently, her school's administration decided to change the course offerings for next fall's academic year without discussing the change with the academic's in the Nanotechnology school, a violation of the school's internal shared governance procedures. Destiny worked with the others on the council to hold a town hall meeting to talk about the change and find out if most were in favor of the change. After a majority in the meeting

objected to the change, Destiny got them all to sign a letter objecting to it, and made a plan with others there to get other site councils to sign as well. She then took the letter to the administration and they backed off of the change.

Paul Hammer works as a Math professor in the school of Math and Sciences. He is the most senior and has been teaching for 14 years. He's always been a union member. He coaches the community's boys' basketball team. He received an University Excellence in Teaching award from the college several years ago and was named "Researcher of the year" last year.

Professors go to Paul to get advice on how to navigate the evaluation and tenure system since he was able to achieve the seemingly unattainable rating of Excellence. When Destiny pulled together the meeting about the course offerings, she asked Paul to get signatures in his school for the letter. Paul got all but two of the other staffers to sign. When the previous union president asked him to run for president, Paul declined, citing his busy schedule during basketball season, and leading community leagues in his free time.

Ted Nailer works as a Math professor in the school of Math and Sciences. He was a student of Paul Hammer. He has only been there for four years and was also basketball player on Paul's team. Ted does whatever Paul asks of him as he sees Paul as his mentor in all things. Paul told Ted he needed to join the union to protect his job – and when Ted had been there for two years, he obediently became the building rep when Paul suggested it was a good way to be "in the know." Ted does a good job distributing union information and helps members get connected with the Union staff whenever they have a problem. When Paul asked Ted to run for President, Ted did it knowing that it would be easy to do as it was uncontested. He knows that the local will be bargaining this year, but he is good with spreadsheets and Paul said that the same people do the bargaining all the time. Ted is feeling good about his new role.

Jorge Rivera is an Associate Professor of Art in the Carnegie School of Drama and Theatre. He's been there 4 years and the students really like him. His colleagues appreciate the fun energy he brings to the classroom and the school. He's always got a smile and something nice to say to people. Jorge is pro-union, and helped Paul get a few of the signatures when Paul was passing the letter about the course offerings. He is always busy preparing for his own big art shows of his own work and thinks people should just be pro-union and says he can't be bothered with them if they aren't. He values his union membership because it has allowed him to be part of the statewide committee about arts instruction and this provides him with connections to other art professionals from across the state.

Things to Consider When You are Planning to Run a Campaign

Assessing Your Current Worksites:

1. How many people have been identified as trusted and respected by a number of people in the worksite/ local? (Leaders connect mobilizers into structures)
2. How many people are actively working in support of the union and have a group of folks that they influence? (Mobilizers get activists to show up and act)
3. How many people are ready to take pro-union action? (Activists see their relationship with the union as a participatory one)

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Based on what's in the scenario only:

1. Who do you identify as the Leader who has moved people the most? Why?
2. Who is the mobilizer – actively working on the behalf of the union and carrying out actions that get others involved? Why?
3. Who is an activist – a pro-union supporter and may take action if asked? Why?
4. The BIG discussion - In what order should you be building relationships with your choices?

Scenario:

You work for a union representing a small school district that serves all grades from K-12 across three sites: an elementary school (K-6), a middle school (7-8) and a high school (8-12). The elementary and middle schools are located next to each other and the high school operates on its own site about 4 miles from the elementary and middle. Because of a budget shortfall that happened just before the last negotiations nearly three years ago, there were layoffs, class sizes grew, and the raises barely kept up with inflation. Members weren't happy with the contract settlement and there's been the most turnover of staff since that anyone can remember. The local has a new contract to negotiate starting four months from now. You have just been assigned to this local, and you are trying to figure out how to build a strong local before contract negotiations begin. You've just finished meeting with the former union president who left at the end of the last school year to return to university, and here is what you've learned from talking to her, and a couple others, about potential leaders and other workers who wield influence:

Tina Love is a second-grade teacher at the elementary school and has been at the school for seven (7) years. She is well liked and personable. She is always sharing and liking the state affiliate's posts on social media and seems to really like the union. She was recruited to the teaching profession by Teach for America and she still participates in this program as a mentor to incoming teachers who come from the same program. She knows A LOT of teachers through this effort and from the annual incoming cohorts of new teachers she helps mentor. She also regularly organizes well-attended happy hours with teachers from across the three different school sites in the district. She volunteers with a couple of local community organizations and regularly wears her union button on her jackets.

Destiny Jackson is a science teacher at the middle school and has been there for 10 years. Destiny never publicly supported the union, saying unions are for blue collar workers, not professionals. Once Janus passed, she dropped her membership. She was recently appointed by her principal to sit on the school site council with administrators and parents to discuss issues in the school. During a staff meeting Destiny asked that the position be elected and a majority of teachers voted for her to be on the council. Recently, her school's administration decided to change the school bell schedule to have an earlier start time for the next academic year without discussing the change at the school site council. Destiny worked with the parents on the council to hold a town hall meeting with the teachers and parents together to talk about the change and find out if most were in favor of the change. After a majority in the meeting

objected to the change, Destiny got them all to sign a letter objecting to it, and made a plan with others there to get a majority of all the teachers and parents. She then took the letter to the administration and they backed off of the change.

Paul Hammer works as a Math teacher at the high school. He is the most senior teacher and has been teaching at the high school for 14 years. He's always been a union member. He coaches the boys' basketball team. He received a Master Teacher evaluation rating from the school district several years ago and was named "Teacher of the Year" by management last year. Teachers go to Paul to get advice on how to navigate the evaluation system since he was able to achieve the seemingly unattainable rating of Master Teacher. When Destiny pulled together the meeting about the school bell and school start time, she asked Paul to get signatures in his school for the letter. Paul got all but two of the other teachers to sign. When the previous union president asked him to run for president, Paul declined, citing his busy schedule during basketball season, and leading community basketball leagues in his free time.

Ted Nailer works as a Math teacher at the middle school. He was a student teacher with Paul Hammer. He has only been there for four years and was also basketball player on Paul's team. Ted does whatever Paul asks of him as he sees Paul as his mentor in all things. Paul told Ted he needed to join the union to protect his job – and when Ted had been there for two years, he obediently became the building rep when Paul suggested it was a good way to be "in the know." Ted does a good job distributing union information and helps members get connected with the Union staff whenever they have a problem. When Paul asked Ted to run for President, Ted did it knowing that it would be easy to do as it was uncontested. He knows that the local will be bargaining this year, but he is good with spreadsheets and Paul said that the same people do the bargaining all the time. Ted is feeling good about his new role.

Jorge Rivera is the Art teacher at the high school. He's been there 4 years and the students really like him. His colleagues appreciate the fun energy he brings to the classroom and the school. He's always got a smile and something nice to say to people. Jorge is pro-union, and helped Paul get a few of the signatures when Paul was passing the letter about the school bell start time. He is always busy preparing for his own big art shows of his own work and thinks people should just be pro-union and says he can't be bothered with them if they aren't. He values his union membership because it has allowed him to be part of the statewide committee about arts instruction and this provides him with connections to other art teachers from across the state.

Things to Consider When You are Planning to Run a Campaign

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3. How many people are ready to take pro-union action? (Activists see their relationship with the union as a participatory one)

Club or Union?

	Unorganized	Club	Union	Fighting Union
Budgeting	Little or no local funding	Funding used to recognize activists -- stipends, meals	Funding used to recognize activists and also to reach out to members: stickers, buttons, tee shirts, picket signs.	Funding used to release activists to do work, to communicate with members, and to open opportunities to the newly active. Funding supports coalition work and socially focused issues
Roles	A few officers, risk of vacancy	Proliferation of titles and stipends to Presidential allies	Titles and roles generally tied to actual activities; if there's a treasurer, there is a budget; if there's a newsletter chair, there's actually a newsletter	Titles rotate regularly, or are even dropped when no longer needed
Bargaining	No bargaining, or done by a single expert (UD, President)	Small group of the usual folks on the bargaining team that the president trusts	Team represents all major job categories. Criteria is whether or not the president trusts them and they are recognized by members	Team represents all major job categories; criteria is whether they are trusted by the members
Leaders	Volunteers if any	Tends to be the same small group of folks that populate other teams. Little to no risks are taken.	Elections are regularly held and there are sometimes contested positions. Leaders can move others to act. However, their focus is on activism and mobilizing instead of term organizing.	Are trusted and respected by members, and there is a healthy election process with a number of good candidates. Leaders routinely deliver on persuading large groups to take public collective action; the and actively seeks other trusted and respected leaders. Leaders use their agency to take risks that result in growth.
Advocacy	None, or done by staff and/or local president Used as one of the few justifications to pay dues	Few members may help with advocacy with much support from staff. Advocacy is solely viewed as a service to single members.	Intentional identification and training of member advocates who conduct low-level meetings with support of higher levels from staff. Most advocacy is still viewed as a service to individuals with some understanding that protecting the work standards are in everyone's interest.	Advocacy is primarily viewed as way to build worker solidarity and ways to exercise collective action in response to poor work standards. Issues to organize around.
Activity	None, or led by the union, the staff, or by union members. No ownership.	Programs for individual interest with little risk in participating. Led by one person, and focus of change is on personal practice.	Works to have leaders design and lead the programs. Focus is on change of relationship with the union from rank and file to leader. Mobilizing and activism are the norms focused on traditional worker issues.	Organizing is the norm focused on the solidarity of the group and the work is to apply pressure on a system of oppression. Issues are broad and include social movement thinking.

This is a draft framework designed to help you think about your role as staff with your affiliate. This is in no way complete and is only designed to be used as a starting point for assessing your next steps with affiliates. Each level from Survival to Advanced is dependent on the previous level.

Levels (Staff Focus)	Membership	Structure Development	Identification and Protection of Rights	Agenda Setting	Visibility and Credibility
Advanced Organizing (Member-led with Staff Advisory and Coaching)	Leaders (elected and not elected) are driving membership recruitment and engagement. Coaching leaders who are committed to the contact and engagement work. One on ones are limited to those who are identified as emerging leaders by other leaders. Exploration of options to expand “belonging” beyond traditional dues paying members. Dues are seen as a positive and an investment in the members.	There are well-defined, member-led, leadership and communication structures in which there is competition for positions. Structures are formed around various issues, are led by members, and come and go. Participation in these structures are for members to collectively use their agency for change. Structures extend beyond the affiliate and work with other organizations around common values, issues and goal. Participation is expected by the rank and file and participation data is shared widely.	Members lead on all aspects of the identification and protection of worker rights. Staff expertise is reserved for legal services and consultation. Members are the visible and credible source for workplace rights attainment and protection. Identification and protection of rights expands beyond membership and affiliate. Local is able to wield power to demand ‘wins’ that are not within their contract but align with their interests outside of bargaining.	Leaders work with all levels of the organization (rank and file, issue structures, leaders, staff) to set agenda. Leaders work with other organizations on shared agendas in which resources, risks, and decisions are shared. Organizational data and issue research are used to drive and evaluate the agendas. Members are given lists and learn how to map their own buildings. There are multiple agendas that are focused both internally and externally.	The affiliate is recognized as long term partner with multiple organizations. It shares values, interests, risks, and resources beyond its own membership. Members view their union as the primary way that they participate in creating the society they want to live in. The reputation of the union is known broadly throughout the community as a good one or one that advocates for its’ community interests. Members have confidence enough to participate in risky, visible actions.

Levels (Staff Focus)	Membership	Structure Development	Identification and Protection of Rights	Agenda Setting	Visibility and Credibility Page 30
Basic Organizing (Member - Staff Partners w /Staff Growth -Coaching)	Staff and Leaders are building capacity to grow, maintain, and engage membership. Focus is on member recruitment AND retention. Engagement of members in actions that encourage ownership and build leadership. Staff and leaders are focused on Identifying potential leaders, ensuring worksite structures, and connecting leaders. One on ones focus on values based relationship and leadership ID. Dues are seen both as an investment in themselves and a transaction for support.	Staff are working to ensure building rep structures exist and local affiliate structures are functioning in ways that support and sustain the affiliate. Structures are coached to move closer and closer to ownership of collective decisions and actions. Coaching the structure to consider leadership pipeline. Participation in these structures is beginning to result in planning and action.	At the worksite level there are leaders and structures for addressing worker rights. There are affiliate level structures and leaders who work alongside staff to support worksites and are beginning to lead on district level issues. Members are part of the problem solving process. There are well established worker rights and processes that the union successfully enforces. Local is able to demand the basics that are guaranteed in their contract.	Staff and Leaders work to gather information about issues workers report from their worksites. Staff and Leaders determine short term and long term goals for both growth and strength. Focus is mostly on organizing to achieve worker wins and build internal capacity. Data is used to help support and evaluate agenda.	The affiliate is recognized as a credible and respected organization capable of achieving wins on issues important to members. The reputation of the affiliate is best known within the school district and its worksites. Members have a positive view of their union and are willing to participate in some public actions.
Beginning Organizing (Staff lead with a focus on growth and engagement)	Signing up members, maintaining lists, ensuring dues collection, providing information about the benefits of belonging. Staff mostly do this work and some locally elected leaders. One to ones are used to survey members. Some non-members are engaged. Staff are engaging members in very transactional or social actions and looking for people to fill existing leadership roles. Dues are seen as a transaction for services.	Ensuring basic structures required for affiliation with state and national are in good order. Focus on finding local leaders and on building a building rep system with at least one person per worksite. Leading effective meetings and modeling collective decision making and planning. Participation in structures is more about process than problem solving.	Reliance on union staff and staff relationships with employer. Members not engaged in problem solving beyond reporting issues to local leadership. Staff drive and lead bargaining, work place policy, and grievance processes. Rights and processes are somewhat known understood by the workers or some policies are worked out with the employer.	Staff help newly identified leaders understand how a union uses a values driven mission to achieve change. Staff develop a plan typically focused on membership growth and basic affiliate functions. Focus is on effective service delivery. Data is used to track members, non-members, and leaders.	The affiliate is somewhat recognized. Members and non-members are clear about membership status. The effectiveness of the union in regards to worker issues is limited. Only a group of activists participate in union activities outside of socializing. Rank and file participation is low and engagement of non-members does not happen.

Survival Organizing (Staff-led with a Focus on Growth)	Signing up members, maintaining lists, ensuring dues collection, providing information about the benefits of belonging. One on Ones focused on recruiting and education of union member value. Staff are engaging members in very transactional or social actions and looking for people to fill existing leadership roles.	Ensuring basic core leadership roles required for affiliation with state and national are filled. Focus on finding local leaders and some worksites have building reps. Participation in structures is focused on monthly meetings and socializing.	Reliance on union staff and staff relationships with employer. Member is not engaged in the problem solving process. Staff drive and lead bargaining, work place policy, and grievance processes. Rights and processes are not widely understood by the workers or clearly established with the employer. Focus is on ‘asking’ employer and ensuring good relationship with key employer personnel.	Staff help newly identified leaders or established leaders to develop basic agendas focused on process for basic affiliate functions. Staff develop a plan typically focused on membership growth and basic affiliate functions. Focus of staff is almost exclusively on service delivery. Data is on members is tracked and information on non-members is noted, but not followed up on.	The affiliate is not yet widely recognized. Members and non-members may be equally confused about their membership status. The effectiveness of the union in regards to worker issues is not a part of the locals work or anticipated work. Members are not likely to participate in public actions beyond social activities. Member participation is low to non-existent and non-members are have no recognition or a negative recognition with the union.
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Worksheet: Spectrum of Allies Segments

1. **Active Allies:**

You believe you can **already** count on them to help you.

If your target falls in this area of the spectrum – you tactics will need to find ways to engage your allies even more actively in working with you toward your goal.

2. **Passive Allies:**

You think they have the same interest, investment or need to solve the problem as you do, and may be close to agreeing with you about your vision, but perhaps may not be able or willing to actively or overtly support you.

If your target falls in this area of the spectrum - your tactics will need to help move them to the “*active ally*” position; increasing their interest and willingness to be active.

3. **Neutral:**

These are people, organizations, institutions that may not know about the problem; may not know about you and your work; have no particular investment in the problem.

If your target falls in this area of the spectrum – your tactics will need to find ways to inform or educate them about the problem and your position in order to move them to a “*passive ally*” position. Examine your tactics to be sure you will not move them toward your opponent’s position.

4. **Passive Opponents:**

These are people, organizations, institutions that you think have some interests that would be opposed to your vision; they may have relationships with people who are actively opposed to you.

If your target falls in this area of the spectrum – your tactics will need to create doubt about their position, raise fears that their position may be “costly” to them in some way. You want your tactics to move them to a “neutral” position and NOT to an active opponent position.

5. **Active Opponents:**

These are people, organizations, institutions that have a big investment in opposing your position (related to power, position, finances, relationships, etc.).

If your target is located in this area of the spectrum – your tactic goal would need to put them into a great dilemma, that any action they would take against you would be very “costly” to them. Your tactic goal would be to move them into a “*passive opponent*” position.

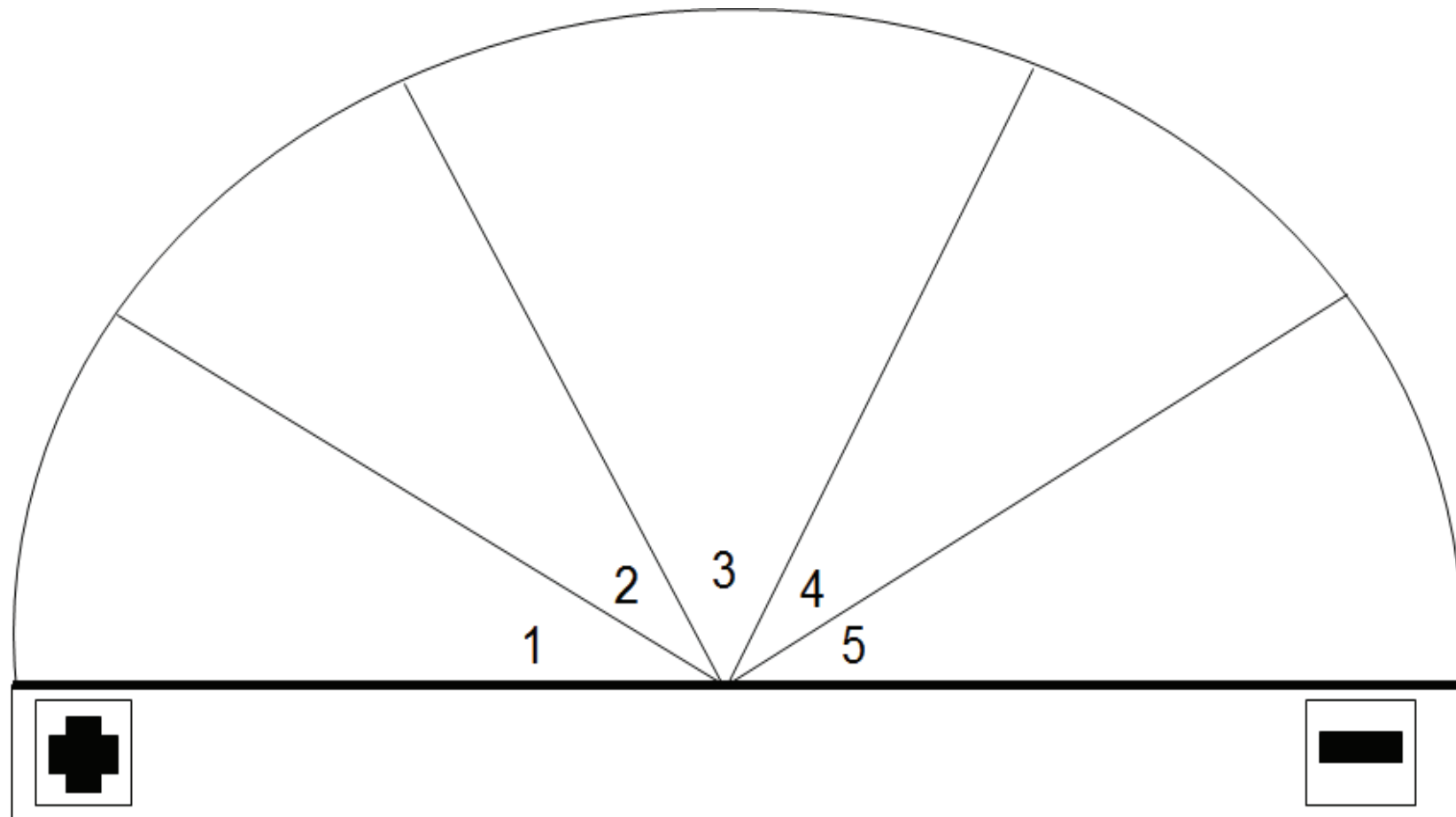
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Problem Statement: _____



Source: Original Source – Training for Change (www.trainingforchange.org) and adapted into five segments by New Tactics in Human Rights.

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DEPARTMENTS

LGBT Workers Need Unions, Not Rainbow Capitalism

Major companies are weighing the benefits of pinkwashing as anti-LGBT extremism is on the rise. Doug Ireland's 1999 piece reminds us what organized labor can offer queer and trans workers.

IN THESE TIMES EDITORS

JUNE 24, 2024



Activists rally in support of LGBTQ rights at New York City Hall on October 8, 2019 in New York City. (Photo by Drew Angerer/Getty Images)

anti-gay and anti-trans agitators have been making news by boycotting major corporations running Pride campaigns and stocking rainbow merchandise. While many corporations make profit-based calculations to decide whether to continue their support for the queer community, in 1999 for *In These Times*, Doug Ireland described how queer and trans workers were winning labor and gay rights battles

A

by organizing across communities. Ireland's words serve as a reminder of how capital has no vested interest in queer and trans liberation, but the labor movement should—and it can win meaningful, material protections for queer and trans workers.

In 1999, Doug Ireland wrote:

Tracy Cleverly worked at the Salt Lake City franchise of a national restaurant chain, where she received positive evaluations and a promotion. She got along well with her co-workers and manager, who knew she was lesbian. But when the restaurant hired a new manager, he announced that “I don’t want those kind of people working here.” Within weeks he fired Cleverly and other lesbian and gay employees.

Jesse Shaw worked as a social worker in a Whitfield, Miss., center for mentally disabled children. She brought to work photos of herself, her female partner and their two dogs to show a co-worker who had asked to see them- and left them on her desk. Ten days later she was fired. “Not because you’re gay,” she was told, “but because you brought in pictures of your lover.”

Robert Lewis worked at a North Canton, Ohio, mail-order company. After learning he was gay, co-workers repeatedly verbally harassed him and slashed his tires. Lewis complained to management, but the harassment worsened. He quit after a co-worker told him, “We’ve driven out others like you, and we’ll get rid of you too.”

These incidents, just a few of dozens compiled by Georgetown Law Center professor Chai Feldblum for a report on workplace discrimination against gays, show why same-sexers need unions that are prepared to stand up and fight for them. For a long time, most of organized labor turned its back on gay people—until gay union activists began fighting for themselves.

Veteran union organizer Nancy Woforth recalls the first stirrings of gay people in the labor movement: “It was over 25 years ago when a handful of people met in a converted funeral parlor in San Francisco to discuss the idea of forming a gay/labor alliance. ... It seemed an impossible dream.” Today, Woforth—the business manager and secretary-treasurer of Office and Professional Employees International Union Local 3 in the Bay Area—is the co-chairwoman of Pride at Work, the national organization for gay, lesbian, bisexual and transgender labor. Formed in 1994, Pride at Work celebrated its recognition by the AFL-CIO as an official constituency affiliate last February.

Today, in what Andrew Stern, president of the Service Employees International Union, calls a “sea-change” in the labor movement’s attitudes toward gays in the last few years, Pride at Work has active chapters not only in San Francisco but in Los Angeles, Seattle, Philadelphia, Washington, Atlanta, New York and several states. And in just the past six months, new chapters have started pulling themselves together in Chicago; Louisville, Ky; St. Petersburg and Orlando, Fla.; Dayton and Cincinnati, Ohio; Hartford, Conn.; Helena, Mont.; and Bloomington, Ind. That this was all accomplished entirely by

volunteers, both union staffers and rank and file, makes it all the more noteworthy. And now the AFL-CIO has given Pride at Work enough money to hire a full-time executive director—who starts in July—and pay for travel and chapter development, as well as providing space for a national office in Washington.

There have, of course, always been lesbians and gays in the union movement—I was a UAW staffer myself in the '60s—but this newfound visibility is good not only for gays, but the labor movement as a whole.

A few examples:

In Boston, where the Gay and Lesbian Labor Activists Network (GALLAN)—the local Pride at Work affiliate—has been in existence since 1986, a Teamsters local representing the drivers of Miller Beer trucks sought GALLAN's help in organizing a boycott of Miller in Boston area bars. GALLAN responded by leafletting gay bars about the boycott, challenging the attempt by conservative elements in the gay community to villainize Teamsters members as thugs, and publicizing labor's active support of pro-gay ballot initiatives. The Teamsters won their strike and sent a large contingent to march in Boston's Gay Pride Parade.

In Atlanta, whose airport is a major hub, there was a drive to organize flight attendants at AirTran (formerly ValuJet). Bill Green, who is openly gay and heads both the Association of Flight Attendants' AirTran local and the AFA's Eastern Region covering nine airlines, says: "We sent some of our members who are lesbian and gay—and there are a lot of 'em—into the gay businesses and bars to rally support. They knew of our struggle at AirTran, and we told people, 'If we go on strike, don't fly AirTran'—a lot of our local drag queens use it to fly to Florida, and our gays vacation up and down the East Coast. The response was terrific." AFA got its contract with AirTran.

In Seattle, the Communications Workers of America recently began a campaign to organize 6,000 "permatemp" workers at Microsoft and other companies in this high-tech capital, many of whom are gay. Andrea Demajewski, the CWA staff organizer spearheading the campaign (baptized WashTech) and a Pride at Work activist, has been using an Internet chatroom for gay techies to identify gay Microsoft workers and bring them into the organizing drive. Demajewski says that being openly lesbian has been an advantage for the WashTech effort: "Gay high-tech people are very supportive of our work. It's always true that if you reach into the gay community, you find people who understand from their own life experiences the need for organizing."

Considering how insular and arteriosclerotic the labor movement often was in the days of leaders like George Meany and Lane Kirkland, the strides made by labor's gays have been enormous. The first major gay-labor coalition in the history of the modern American gay movement began in 1975 in San Francisco, when Bay Area Gay Liberation (BAGL, then the largest local gay group) decided to support a strike by municipal workers. This led to a mutual assistance agreement between the city's Central Labor Council and the organized gay community, whose interests frequently coincided. Later that same year, when the Coors brewing company tried to bust its Teamsters local, the gay community enthusiastically supported the union's boycott because of the company's notoriously anti-gay policies. (Coors workers were required

to take a lie detector test that included the question, “Are you homosexual?”) By the end of the ’70s, California’s labor movement was a solid gay ally, providing the money and manpower to defeat the 1979 Briggs Initiative, which would have banned homosexuals from teaching in public schools.

In 1982, the American Federation of State, County and Municipal Employees (AFSCME) became the first major union to adopt a resolution opposing discrimination against gays and lesbians. Ginny Cady, a 22-year AFSCME veteran who serves as international union president Gerald McEntee’s gay liaison, says that in the early ’80s this was largely a pro forma position: “There wasn’t a lot of support or discussion of gay issues—it just wasn’t talked about. Now, a majority of our contracts have sexual orientation in their non-discrimination clauses, and increasing numbers include domestic partnership benefits for same-sex couples.”

AFSCME’s national conventions now feature an informal “gay day,” with a gay caucus, workshops and reception. McEntee has a 12-member gay and lesbian advisory committee, with delegates appointed by the union’s regional vice presidents. AFSCME’s legal department even filed a friend-of-the-court brief in the successful fight to have the Supreme Court strike down Colorado’s Amendment Two, which would have barred local gay rights laws in the state.

The SEIU is another union that has undergone a radical transformation into one of the most gay-friendly in the AFL-CIO. “I remember six years ago at our convention when, for the first time, an openly gay delegate stepped to the microphone with fear and courage to support a resolution opposing discrimination on the basis of sexual orientation,” says SEIU president Stern. “To see how far gay and lesbian people who stood up for themselves have come in what I like to think of as a more and more progressive union is thrilling.”

Now, there is a Lavender Caucus in each of the union’s three regions in the Western region alone there are more than 30 local caucuses and Stern predicts that it will soon become the second such interest group to be recognized by the national union (along with AFRAM, the African-American caucus), entitling it to significant financial support.

Tom Barbera, a rank-and-file SEIU activist from Massachusetts who chairs Pride at Work’s Chapter Development Committee, credits Stern’s predecessor, John Sweeney--now AFL-CIO president--for leading the way. “Sweeney really took a strong stand for inclusion of gays and lesbians in the civil rights struggle,” Barbera says. “Whenever he made a speech, he always made sure to include us in the list, along with women and people of color. It’s the fact that Sweeney now is the federation’s president that has dramatically opened up the labor movement to Pride at Work and what we do. As someone who’s been around for awhile, I’m so happy that there’s a place for lesbian and gay working-class people.”

In some places with a history of strong labor-gay cooperation, smart new-breed labor leaders are helping to organize Pride at Work. That’s the case in Atlanta, where Stewart Acuff, the president of the city’s Central Labor Council, also helped mobilize strikes against the Cracker Barrel restaurant chain, infamous

for its anti-gay employment policies. (The Georgia case in which Cracker Barrel fired a cook for being lesbian is portrayed in the superb documentary *Out at Work*, which also featured members of the United Auto Workers and AFSCME who suffered discrimination; the film has been used by Pride at Work as a major organizing tool.)

Pride at Work, its leaders underscore, is firmly in the progressive camp, both within the labor movement and the gay community. As national co-chairwoman Wolforth says, “We reject what I call vending machine unionism—I put in my quarter and you service me—and want to help change the labor movement so that it becomes more of a community again.”

However, as the out gay community has mushroomed in the last two decades, it has come to reflect political and cultural changes in society as a whole, and has a growing conservative element—symbolized by the decision of the nation’s wealthiest gay rights organization, the Human Rights Campaign, to endorse New York Republican Sen. Al D’Amato for re-election last year despite his anti-labor, right-to-life record. Pride at Work’s February convention voted firmly to oppose the Millennium March in 2000—an event unilaterally called by HR and the Metropolitan Community Church (the largest gay religious denomination)—and the march’s conservative “Faith and Families” theme. The gay labor activists see HRC, with its \$15 million budget, as appealing mostly to middle- and upper-class white gays, and view the HRC-led march as a prime case of empire-building that will have little political impact and waste a lot of money and energy that ought to go into grassroots organizing. “Working-class gay and lesbian people get screwed every day,” says Wolforth, “but HRC doesn’t care about that.”

Pride at Work also has helped to unionize large AIDS services organizations, like Washington’s Whitman-Walker Clinic and the San Francisco AIDS Foundation, overcoming opposition from conservative gays. Wolforth points to a current dogfight in San Francisco as a “perfect specimen of the ramifications of race and class issues in the gay community.” The Castro Street Merchants Association, representing businesses in the city’s largest gay enclave, are fighting a proposal by the openly gay president of the San Francisco Board of Supervisors, Tom Ammiano (a longtime teachers union activist), to establish a homeless youth shelter in the heart of the Castro. “A lot of gay kids are forced out on the street when they come out, and many of these gay kids gravitate to the Castro,” Wolforth says. “Yet here we have part of our gay community that’s gotten rich and ugly saying, ‘We don’t want your shelter here.’ This is the guppie (gay yuppie) mentality gone mad.”

Pride at Work is a real-life rebuke to those neocons and neolibs who engage in ritual denunciations of “identity politics”—but anyone with grassroots organizing experience knows that all politics are identity politics, including the working-class solidarity that makes unions possible. And the gay labor activists are proving the truth of the late civil rights leader Bayard Rustin’s dictum that all successful political coalitions are based on mutual self-interest. For example, the Oregon Pride at Work chapter helped the large statewide group, Basic Rights Oregon, initiate an ongoing progressive voter identification project with the state’s labor movement. The more than 100,000 gay and gay-friendly voters identified by the

project helped swell the coalition's roster of progressive voters to over half a million—enabling it to defeat a series of right-wing, anti-gay ballot measures and pass pro-labor referenda, making it a real power in state politics. Similar projects are forming in Michigan, Washington State, Texas and Florida.

But the labor movement still has a long way to go. Only a few national unions have followed the lead of AFSCME in making gay and lesbian issues a permanent and formal part of shop steward training programs. “We get a lot of calls from very homophobic areas, rural areas, where there are very bad incidents of homophobia in plants and on the shop floor,” Woforth reports. “People are afraid to come out, and don’t know how to approach their unions. Even some progressive unions are lagging—the UAW provides very little support for its gay members. So we’ve still got a lot of work to do. And no matter what anybody says, we’re not going to go away, and we’ll keep on growing.”

Until Pride at Work’s Washington office opens, for more information write to them at 340 Brannan Street, Suite 400, San Francisco, CA 94107.

Have thoughts or reactions to this or any other piece that you'd like to share? Send us a note with the Letter to the Editor form.

Centering Equity in your Campaigns

What does it mean to center equity in your campaign?

Race, class, and gender dynamics, disparities, and divisions permeate our society, communities, schools, and classrooms. Systemic oppression is so deeply rooted in our history, culture, and institutions that there is no escaping it. Visible or not, the impacts are ever-present. Race, class, and gender justice is the systematic fair treatment of all people resulting in equitable opportunities and outcomes for all. Justice, or equity goes beyond being against the systematic use of oppressions like misogyny, racism, and classism. It is not just the absence of discrimination and inequities, but also the presence of deliberate systems and supports to achieve and sustain equity through proactive and preventative measures.

To engage in a systems analysis of a racial issue and develop solutions or to test if the campaign demands center race, class, and gender justice, **good discussion questions to have with partners and union members include:**

Problems: What inequities are you noticing or experiencing? What are the impacts on different groups? Who benefits most and who is hurt most?

Causes: What institutions, policies, or practices are causing or contributing to the inequities? What social norms, popular myths, or cultural biases may be contributing?

History: How did things get this way and are things worsening or improving?

Solutions: What solutions could address the root causes and eliminate the inequities? How would different racial groups be impacted by the proposed solutions?

Strategies: What strategies and actions could be used to advance the solutions?

Leadership: Who are the stakeholders most affected by the inequities? Are they involved in naming the issues and solutions? What kinds of active leadership roles could they take to advance the proposed solution?

Additional Equity Tool Questions:
Who is most directly impacted?
Who has been left out?
How can they be directly engaged?
How do our demands center race, class, and gender justice?

Racial Equity Tool

Introduction: A Racial Equity Tool is used for making decisions with deliberate attention to racial justice, equity, and inclusion. It provides a guide and protocol for race- and equity-conscious decision-making that is thoughtful, transparent, participatory and systematic. It can be used for a variety of decisions, such as assessing existing or proposed policies, practices, plans, programs, budgets, etc.

Why use this tool? This tool can help us to align our words and actions with our values, priorities and aspirations, and to:

- Consciously, actively, and continually prioritize racial justice,
- Eliminate, reduce, and prevent harm, exclusion, inequities, and bias,
- Ensure that stakeholders, especially those most marginalized, are actively and authentically engaged in needed change efforts, and
- Build practice and organizational culture that advances racial justice, social justice, equity, and inclusion.

Who uses this tool? This tool is best used by a diverse team of people from different parts of the organization, that can also include external stakeholders and partners. For each specific use of the tool, the team will identify and engage the most relevant stakeholders, especially those most marginalized, under-represented and directly affected by the decision under consideration. When using equity tools, *who* is doing the assessment is as important as *what* you are assessing. An inclusive process will yield more inclusive results.

How do you use the tool? The tool involves a series of steps that can be followed sequentially. The process is also iterative so, with new information, you may need to jump back to a previous step to revise your findings. Each step provides questions for consideration by relevant stakeholders. Be sure to allow ample time to thoughtfully and inclusively address each step. It is not meant to be used and completed in one sitting. It often requires time to gather information and consult with various stakeholders over a series of meetings or engagements. The tool is designed to be widely applicable to many different kinds of decisions. Every question may not be relevant for every decision. Feel free to tailor add other helpful questions to inform your decision. For more significant or controversial decisions, you can address all of the steps and questions for a robust analysis. For less consequential decisions, you can select the most relevant questions and do a simpler and shorter analysis. While this tool foregrounds race as a central focus, please address other relevant or intersecting power dynamics.

Racial Equity Tool

Step	Questions to Consider	Findings / Notes
1. Clarify Goals	• What kind of decision is under consideration (e.g. policy, program, budget, working conditions)? • What results or changes are you seeking to advance racial/social justice?	
2: Engage Stakeholders	• Who is most directly impacted, especially those most marginalized under-represented (e.g. staff of color, lowest paid workers) • How can they be meaningfully engaged, and empowered in this process?	
3. Analyze Data	• What is the relevant history and current context? • What data do we have and what do we need? Is it disaggregated by race? • Who benefits and who is most burdened? How are different racial/ethnic groups affected differently? • What are the root causes of the problem? Are there intersecting dynamics?	
4. Generate Options	• What proposed solutions can address the root causes and change systems? • How will this proposal advance racial justice, equity, and inclusion?	
5. Assess Impacts	• What are the positive & negative impacts on different racial communities? • How will communities of color benefit from each option? • How can this help counteract dominant patterns of white supremacy? • What positive values, norms, and narratives can we affirm and project? • How does this align with our values, vision, mission and priorities?	
6. Decide Solution	• What are the pros and cons of each option? • Are there ways to revise the options to prevent adverse consequences? • Which option best advances equity?	
7: Develop Implementation Plan	• What strategies, staffing, and funding are needed to ensure success? • What is the implementation plan & timetable? Who will move it forward? • How will we document & measure progress? What are success indicators? • How can we ensure ample communication, participation & accountability?	
Step 8: Operationalizing Equitable Change	• How can we operationalize equity practices to sustain success? • How do we institute these changes so they become ongoing practices, protocols, habits – a part of our organizational culture?	

Worksheet for Comparing Racial Impacts of Different Proposed Solutions

1. Use this worksheet for Steps 5 and 6 of the Racial Equity Tool. List the different proposed solution options to assess in the top shaded row.
2. For each option, list potential positive impacts and negative impacts for different racial groups. In the bottom row, list other noteworthy factors or findings, such as intersecting dynamics (e.g. gender, class), geographic or generational differences, etc.

	Solution Option 1: _____	Solution Option 2: _____	Solution Option 3: _____
Potential Positive Racial Impacts			
Potential Negative Racial Impacts			
Other Notes & Considerations			

(Adapted from Race Forward, Revised 1/31/21)

**BARGAINING
FOR THE
COMMON GOOD
RACIAL
JUSTICE GUIDE**



NATIONAL EDUCATION ASSOCIATION

The National Education Association is the nation's largest professional employee organization, representing more than 3 million elementary and secondary school teachers, higher education faculty, education support professionals, school administrators, retired educators, and students preparing to become teachers.

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NEA would like to thank the Center for Innovation in Worker Organization/BCG at Rutgers for contributing to the development of this guide. We also want to thank our affiliates, who provided us with many inspiring stories of Bargaining for the Common Good for racial justice demands.

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RESOURCES



Since the 17th Century, our nation's system of public education has been the undisputed foundation of an inclusive democracy, economy, and society. Public school classrooms are where our students first learn how democratic systems of government work, and where they develop an understanding of the principles and practices that will allow them to participate in the operation of the U.S. government.

Unfortunately, when they should be working to strengthen our democracy, some far-right politicians, policymakers and pundits are actively working to dismantle it. Their weapon? Escalated attacks against public education. From attempting to whitewash the nation's history to eliminating the contributions and lived experiences of Black people and communities of color, to maligning and marginalizing LGBTQ+ students and educators, these attacks are only intended to fulfill the self-serving desires of the attackers and their wealthy donors.

Their efforts are rooted in the fertile ground of this sad truth: Inequity is sewn into every social system in our nation. These inequities make their presence known at every schoolhouse door, and in every other element of far too many communities.

With 3 million members, NEA is the nation's largest labor union. As education professionals devoted to ensuring that the nation's 50 million public school students receive the support, access, and opportunities they all need and deserve, we have not—and we will never—allow these unfounded and harmful attacks to go unanswered. We will continue to follow the North Star of our shared vision: to unite not just our members, but the nation to reclaim public education as a common good, as the foundation of our democracy, and then transform it into something it was never designed to be—a racially and socially just and equitable system that prepares every student, every one, to succeed in this diverse and interdependent world.

This Bargaining for the Common Good Racial Justice Guide represents a critical step toward the achievement of that vision.

The principles of Bargaining for the Common Good (BCG) are fastened to the belief that just as inequity is woven through the fabric of many communities, the collective bargaining process must have woven through it the unique needs and aspirations of the community that encircles the educators and students whose needs are represented at the bargaining table.

In addition to examples of how NEA state affiliates have bargained for the common good in schools and communities nationwide, this guide contains a roadmap for creating campaigns built from intentional, long-term partnerships between unions and community organizations. It also provides information about how those relationships can help to facilitate bargaining proposals designed to end the systemic patterns of racial inequity and injustice that hamper the progress of far too many students, educators, and public schools.

As parents, educators, and communities, we have a shared responsibility to ensure that every student—Black, White, Brown, Indigenous, or AAPI; students from underserved neighborhoods, LGBTQ+ students, and students who are disabled—all of our students—have the joy, justice and excellence they all need and deserve. Through bargaining for the common good, NEA is transforming that desire into a reality for students, educators, and communities across our nation.



Rebecca S. Pringle

President

National Education Association

PURPOSE OF THE RESOURCE GUIDE



INTRODUCTION TO RACIAL JUSTICE CENTERED EDUCATION

National Education Association (NEA) locals across the country are at the forefront of moving strategic demands grounded in racial justice that dismantle historical and pervasive racist structures in education. Locals are building with parents, students, and community partners to fight for a system where all students can thrive no matter their race, gender, or immigration status.

But for years, corporate actors and political players have stood in the way by defunding public schools and privatizing education, disproportionately impacting communities of color and low-income neighborhoods, implementing hurtful discipline policies that predominantly target students of color, and more recently censoring teachings about racial justice and the histories of Native People, Asian American and Pacific Islander, Black, Latino/a/x, Middle Eastern and North African populations.

We must unite to take on these challenges. Union members are recognizing their dual roles as both workers and key leaders in their communities. In a changing and stratified economy, we are expanding collective bargaining, policy fights, and corporate campaigns to address the challenges we face as workers, neighbors, and families. **Labor and community organizations are collaborating to advance unified demands that are relevant to both workers and the broader community.** This way of coming together is called Bargaining for the Common Good (BCG).

In 2022 and 2023, we saw the power and energy of BCG in Oakland, St. Paul, Minneapolis, Los Angeles, and in growing numbers of states. These campaigns brought community members to the bargaining table with unions and thousands into the streets to take on corporate power and fight for the schools, housing, and cities we all deserve.

How are unions and community groups Bargaining for the Common Good?

At the center of BCG campaigns are intentional, long-term alignments between unions and community organizations advancing racial justice demands. Connecting at all levels starting with membership, they build strong, lasting partnerships based on trust and a shared analysis of the systemic problems we are confronting and the solutions necessary to transform our communities. BCG campaigns are centered around joint community-labor planning that brings diverse partners to the table in union bargaining, policy fights, and corporate campaigns that build power and address the crises we all face. BCG work centers racial justice because we must collectively confront structural racism to create a powerful, unified movement.

Building strong, sustainable relationships is not easy. **Effective BCG campaigns require unions to use the bargaining process as a tool to engage members in their dual identities as workers and community members. Community organizations must also educate its members about unions and how they can bargain together.** Both groups must work to overcome any historic animosity or mistrust to develop a shared framework, from membership to leadership, that sees corporations and the wealthy elite as the perpetrators of injustice in our communities and workplaces.

In this resource guide, you will learn more about what makes a Bargaining for the Common Good campaign, along with tools and resources that your local can use to work with partners in your area to run a BCG campaign.

THE RESOURCE GUIDE IS BROKEN UP INTO THE FOLLOWING SECTIONS WITH KEY TAKEAWAYS



SECTION 1: PRINCIPLES AND VALUES

Explains Bargaining for the Common Good and the framework principles that are essential to accomplishing our vision of racially equitable and just schools.

Takeaways:

- We need to run Bargaining for the Common Good racial justice centered campaigns because class and race are not separate.
- If we want to win real people power, we have to build campaigns that include racial justice.

SECTION 2: ELEMENTS OF A BARGAINING FOR THE COMMON GOOD CAMPAIGN

Provides tools and resources to run a Bargaining for the Common Good campaign through the lens of the five elements of BCG.

Takeaways:

- Bargaining for the Common Good campaigns are rooted in building power in our local unions and communities.
- The five elements of a BCG campaign are:
 - Center racial justice in demands
 - Engage community allies as partners in issue development and the bargaining campaign
 - Expand the scope of the bargaining beyond wages and benefits
 - Expose bad actors
 - Strengthen internal organizing, membership, and member engagement
- Community building is an integral part of the strategy and tactics, which means it takes time to develop, create and build, and move forward. To build a BCG campaign, planning begins two years in advance.
- We need to clearly express who the bad actors—the real decision-makers that affect our workplaces and our communities—are and ensure there is a clear connection between the bad actors and the demands.
- Bargaining for the Common Good campaigns require ongoing organizing, base-building, and leadership development.

SECTION 3: SUCCESS STORIES

Shares stories of locals succeeding in building people power in their area.

Takeaways:

- Victories are feasible in different political conditions.
- Organizing doesn't end when we settle the contract or win the campaign. These victories are possible only if organizing is ongoing.

SECTION 4: RESOURCES

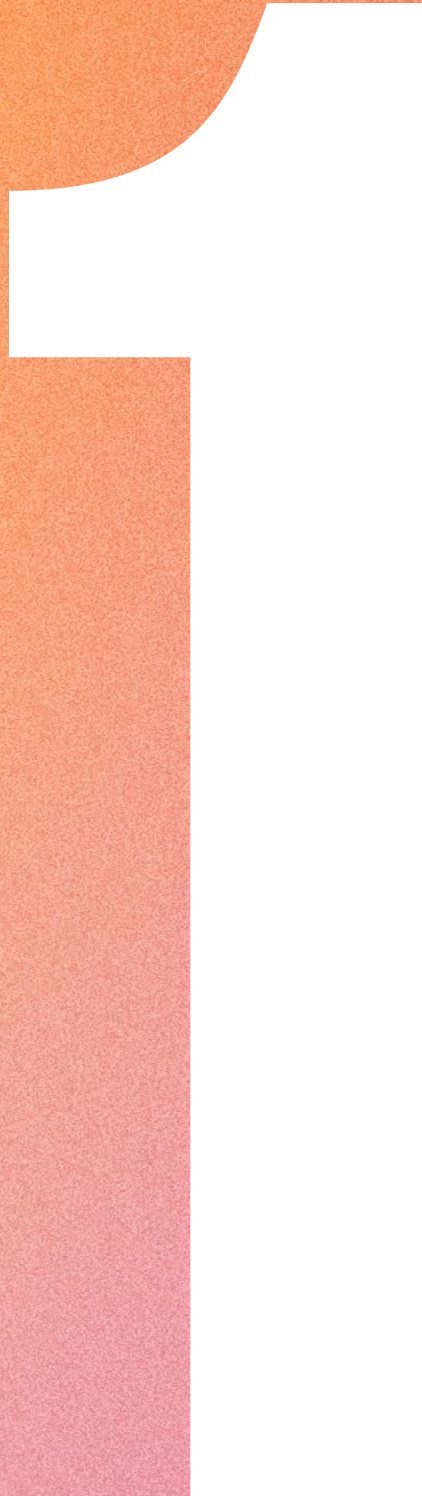
Shares links to tools and resources provided in Sections 1-3.

Takeaways:

- A compilation of BCG tools and resources developed by NEA locals.
- Includes a glossary of racial justice language.



PRINCIPLES AND VALUES



BARGAINING FOR THE COMMON GOOD

With Bargaining for the Common Good, union members partner with the community around a long-term vision for the structural changes they want to see in their communities. Together, they use collective bargaining and advocacy as critical components in a broader campaign to win that change, advance racial equity, and build people power.

Educators partner with parents and community members in order to identify issues and utilize bargaining, or other forms of advocacy, as a vehicle to make demands for the entire community.

In states with collective bargaining, contract negotiations provide an opportunity for educators and their unions to involve the larger school community in the vision they want for their school and neighborhood. Instead of going to the bargaining table alone and isolated in negotiations, unions join together with parents and the community, which builds our power. In states without collective bargaining, unions and community groups align to push for policy changes that require school districts and corporate actors to meet the demands of the community.

When we expand the continuum of bargaining, we build power and go on the offense in order to fight for social and racial justice for our students, schools, communities, and the future.

With Bargaining for the Common Good, we not only fight for better pay and benefits for educators, we also fight for students and communities. When stakeholders come together, they can determine what their community needs. NEA members have successfully used the Bargaining for the Common Good strategy to win:

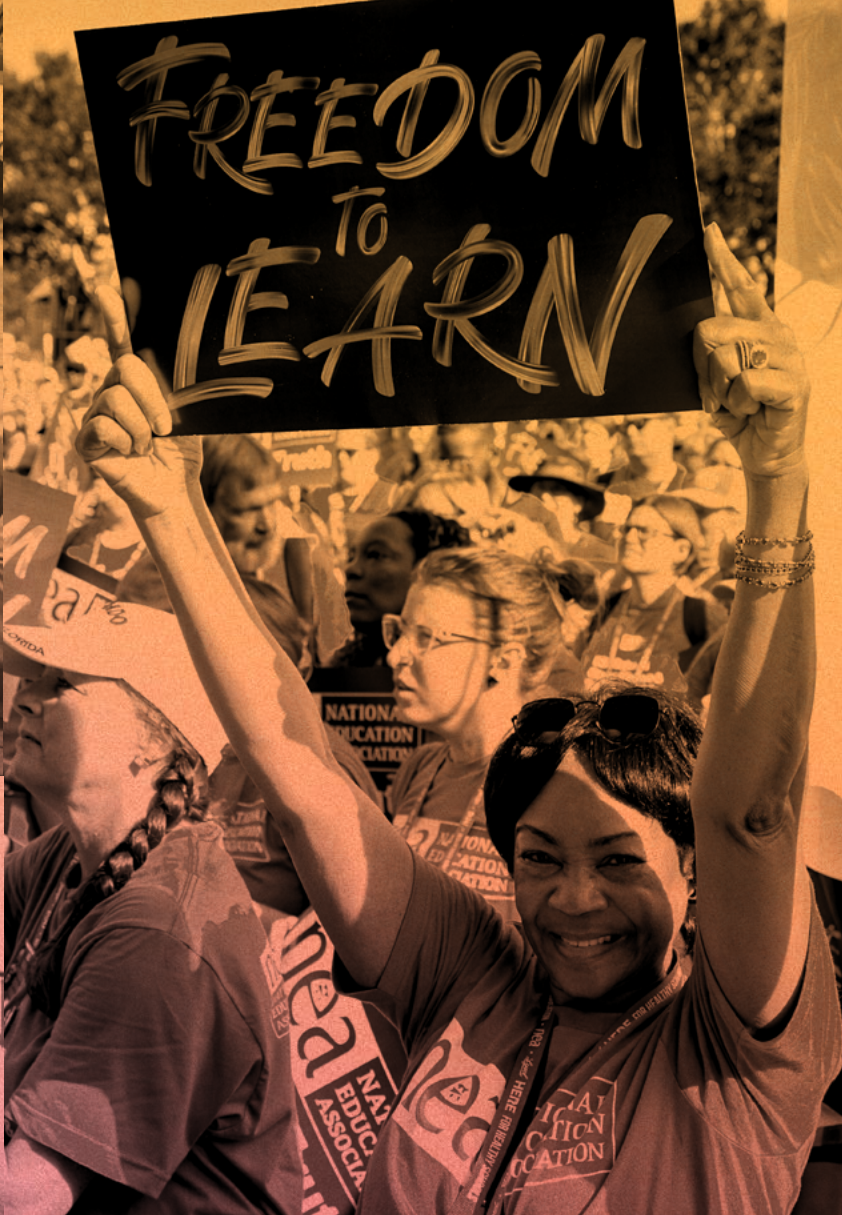
- Less testing
- Smaller class sizes
- Educator recruitment and retention programs
- Equitable school discipline policies
- Mental health support
- More nurses and counselors
- No ICE (Immigration and Customs Enforcement) collaborations
- Implementation of restorative justice
- End random backpack checks
- Institute and/or expand ethnic studies for students

Bargaining for the Common Good works in both areas that have collective bargaining and areas that do not. The mechanics may differ, but the fundamentals are the same.



“In addition to salaries that keep up with inflation and smaller class sizes, Oakland educators held the line for almost seven days on what are known as, ‘common good demands.’ Common-good bargaining refers to agreements that go beyond issues of wages and benefits in an attempt to have a positive impact on the broader community. Under the new tentative contract, the Oakland Unified School District agreed to educators’ demands to utilize unused school buildings for nonprofit housing developments, provide resources for unhoused students, and fund programs such as the Black Thriving Community Schools that would empower Black students with leadership opportunities . . . The groundbreaking common-good demands won in Los Angeles and Oakland are proof that by standing together, educators have the power to effect change outside of normal bread-and-butter issues. Now, students and communities will benefit from the hard work that educators have put in to achieve these victories.

– Cecily Myart-Cruz, President of UTLA and Bargaining for the Common Good Advisory Committee member, “The California Teachers’ Strikes Have a Vital Lesson for the Labor Movement,” The Nation, May 19, 2023.



RACIAL JUSTICE IN EDUCATION FRAMEWORK PRINCIPLES

NEA has a vision for quality public education for every student. We know that institutional and structural racism are barriers to achieving our vision. We will leverage the power and collective voice of our members to end the systematic patterns of racial inequity and injustice that affect our Association, schools, students, and education communities.

It is our belief that these Framework principles are essential to accomplishing our vision of racially equitable and just schools:

- Our collective work promotes a vision for public education that advances inclusion, equity, and racial and social justice in our schools, Association, and society.
- Our collective work must dismantle white supremacy, and ensure that bigotry and discrimination based on gender, sexual orientation, disability, or national origin is not part of our Association, classrooms, educational curricula, classroom management, school policies, and discipline practices.
- Our Association and schools must be safe for all students, and free from state-sanctioned, racialized, and gender-based violence. Our work must actively divest from prison cultivation and invest in counselors and positive discipline practices.
- Our work must result in action—programs, campaigns, policies, and capacity-building efforts for local NEA members that dismantle institutional racism now and into the future. Initiatives should create sustainable infrastructures that can continue to create systemic change and hold decision-makers, elected officials, and institutions accountable.
- Our current governance leaders must recruit, engage, and promote leadership by educators of color to share the ladder of opportunity because we are stronger together.
- Programs, campaigns, and projects must be driven by goals that are clearly outlined, tracked, and measured, and that have accountability systems that explicitly promote racial justice.
- Our work must promote education policies, professional practices, and curricula that highlight and honor the histories and cultures of Native People and People of Color.
- We must work to ensure that all students have access to a safe and quality education, regardless of their country of origin or immigration status.
- Our work must promote and support the engagement of students of color and LGBTQ students in shaping policies that directly impact their educational experience and foster safe and inclusive schools.
- We must work to dismantle discipline systems that create the School-to-Prison Pipeline and replace them with practices that encourage inclusion and are free from racial and ethnic bias.

CONNECTING FRAMEWORK ELEMENTS

Throughout our history, the NEA has joined in partnership to move policies that would address inequities in education, but we understand now that racial justice in education requires movement beyond racial equity. A lack of movement will keep us at the precipice of doing a lot with limited ability to sustain it.

It will require that:

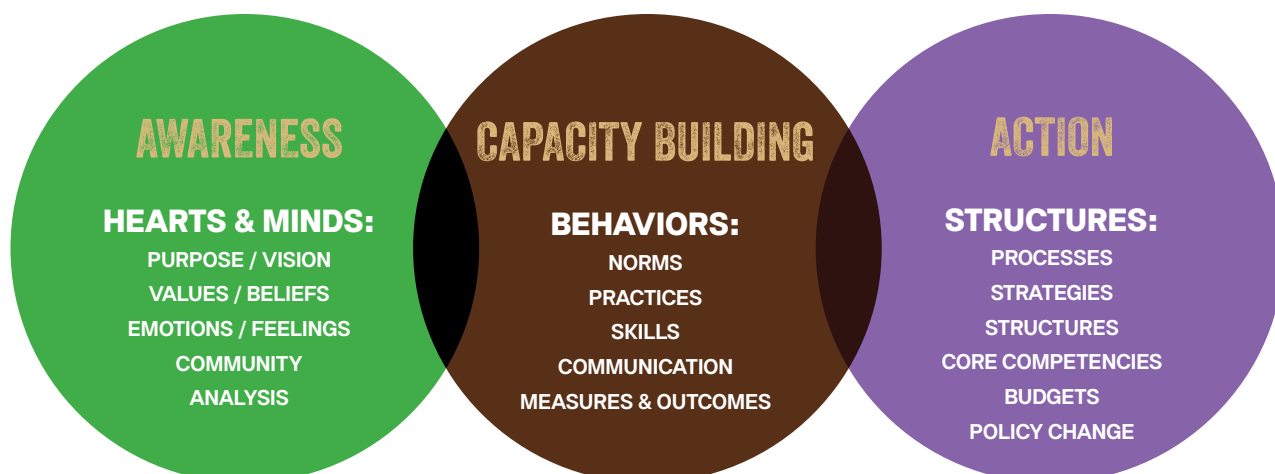
- We have a deep understanding of racial history and the associated trauma and are able to acknowledge the presence of this trauma within current systems, norms, practices, and policies.
- We focus on solutions that will build power (e.g., political, economic, civic, community) for the most sharply impacted communities and people.
- We effectively use racial impact assessment tools and develop racial justice action plans.
- We shift and share power, programs, and resources.
- We adopt anti-racist and racial justice protocols and practices.
- We shift culture and narrative.
- We use data to drive results/impacts.

The NEA Racial Justice in Education Framework was developed in conjunction with the principles and concepts embedded in the “Wheel of Change” model (adapted from the Rockwood Wheel of Change). This Framework centers and guides our systems change work, including our approach and implementation of Bargaining for the Common Good campaigns.

AWARENESS

Goal: Develop and strengthen our collective awareness and understanding of the causes and impacts of systemic (i.e., institutional and structural) racism in education and both the necessity and centrality of racial justice in achieving NEA’s mission.

- Build racial equity awareness and analytical capacity across our Association.
- Foster understanding of key concepts such as systemic (institutional and structural) racism, implicit bias, racial equity, and multiracial systemic solutions.
- Develop shared knowledge and conceptual clarity that supports normalizing explicit and constructive conversations about race.



CAPACITY BUILDING

Goal: Equip and prepare members and leaders with skills to use the strategies to take action to advance racial justice.

- Equip members, leaders, staff, and partners with the skills, tools, strategies, resources and relationships to be effective leaders and advocates in the fight for racial justice in education.
- Develop tools and resources to support organizational and cultural change through policy, practice, and behavior changes.

ACTION

Goal: Equip members and stakeholders with tools and skills to advocate, organize, and mobilize to disrupt institutional racism and advance racial justice in education.

- Engage and activate members, leaders, and stakeholders in on-the-ground efforts to combat institutional racism and advance racial justice.
- Support external organizing efforts to advance changes in our schools and communities.
- Support internal opportunities to implement equitable practices that positively impact the Association's work and promote culture change.

SECTION 1: PRINCIPLES AND VALUES

TAKEAWAYS:

- We need to run Bargaining for the Common Good racial justice centered campaigns because class and race are not separate.
- If we want to win real people power, we have to build campaigns that include racial justice.

ELEMENTS OF BARGAINING FOR THE COMMON GOOD

2

CENTER RACIAL JUSTICE IN YOUR DEMANDS

Campaign demands should address the role that employers play in creating and exacerbating structural racism in our communities.

What does it mean to center racial justice demands?

Racial dynamics, disparities, and divisions permeate our society, communities, schools, and classrooms. Systemic racism is so deeply rooted in our history, culture, and institutions that there is no escaping it. Visible or not, the impacts are ever-present. Racial justice is the systematic fair treatment of people of all races, resulting in equitable opportunities and outcomes for all. Racial justice (or racial equity) goes beyond “anti-racism.” It is not just the absence of discrimination and inequities, but also the presence of deliberate systems and supports to achieve and sustain racial equity through proactive and preventative measures.



To engage in a systems analysis of a racial issue and develop solutions or to test if the campaign demands center racial justice, good discussion questions to have with partners and union members include:

- **Problems:** What racial inequities are you noticing or experiencing? What are the impacts on different racial groups? Who benefits most and who is hurt most?
- **Causes:** What institutions, policies, or practices are causing or contributing to the inequities? What social norms, popular myths, or cultural biases may be contributing?
- **History:** How did things get this way and are things worsening or improving?
- **Solutions:** What solutions could address the root causes and eliminate the inequities? How would different racial groups be impacted by the proposed solutions?
- **Strategies:** What strategies and actions could be used to advance the solutions?
- **Leadership:** Who are the stakeholders most affected by the inequities? Are they involved in naming the issues and solutions? What kinds of active leadership roles could they take to advance the proposed solution?

Source: <https://neaedjustice.org/wp-content/uploads/2018/11/Racial-Justice-in-Education.pdf>



OTHER TOOLS YOU CAN USE TO ENSURE A DELIBERATE ANTI-RACIST CAMPAIGN

RACIAL EQUITY IMPACT ASSESSMENT:

A racial equity impact assessment is used for making decisions with deliberate attention to racial justice, social justice, equity, and inclusion. It provides a guide and protocol for race- and equity-conscious decision-making that is thoughtful, transparent, participatory, and systematic. This type of tool can be used to analyze policies and contract language, institutional practices, programs, plans, and budgetary decisions.

Fix L.A. was a community-labor partnership that fought successfully for:

1. The creation of 5,000 jobs, with a commitment to increase access to jobs for Black and Latino/a/x workers.
2. The defeat of proposed concessions for city workers.
3. A commitment from the city to review why it was prioritizing payment of bank fees over funding for critical services.

“Bargaining for racial justice is a radical idea and will not be easily won. It will require concerted direct action targeting the real decision makers in both the public and private sectors that have a vested interest in keeping racial inequities in place.”

- Maurice Weeks and Marilyn Sneiderman, In These Times, “Why Labor and the Movement for Racial Justice Should Work Together”, September 02, 2016.

BARGAINING FOR THE COMMON GOOD DEMANDS:

Bargaining for the Common Good campaigns are rooted in winning racial justice demands. Many have generated amazing wins and demands across the country.

This booklet provides concrete examples of common good demands that unions and community groups have bargained for across the country. Some of these demands have been won in bargaining or outside the negotiations table, and some are still being fought for.

NEA locals have been at the forefront of winning BCG campaigns. They have identified and won racial justice demands across the country. Demands can be about a range of issues from public health and safety, safe working and learning conditions, academic success, and social and emotional well-being. The list of sample demands includes:

- Acknowledge the pandemic was not experienced equally by all communities and populations, particularly in rural areas and communities of color. Listen and learn how different families handled virtual learning.
- Provide and prioritize housing, food, health, dental, and job services in neighborhood schools because it is a common-sense way to begin to address racial justice issues and the racial inequities they create and exacerbate.
- End attempts to re-segregate our school communities with charters, vouchers, and other privatization schemes that funnel resources away from public schools.
- Ensure school plans for in-person instruction are inclusive and equitable for all educators and students by humanizing learning environments and designing spaces that are situated in the experiences of communities of color, not just through white, cis-hetero, and ableist lenses.
- Ensure adequate time is provided for classroom community-building activities and consider additional staff to allow for the development of restorative practices in schools.
- Prioritize hiring, retaining, and promoting educators of color.

BUILDING YOUR RACIAL JUSTICE TEAM:

Building the right team to make decisions and move this work is critical. Your racial justice campaign team should include a leadership team, organizing/mobilizing team, communications team, political team, and in a collective bargaining campaign, a bargaining team. There should also be team members who lead the research work and legislative/policy development.

- The **leadership team** will direct and oversee the entire campaign. They have a bird's eye view and focus on advancing the campaign forward. They provide the vision and make the tough decisions with input from the rest of the team.
- The **organizing and mobilizing team** is responsible for recruiting impacted people and new partners and mobilizing members and activists. They communicate frequently and engage members and activists in two-way conversations about the campaign's vision, strategy, and action plan.
- The **communications team** drives the internal and external communications. They educate and agitate activists and members, work with the media and develop social media to define the narrative, and build public support.
- The **political team** leads the efforts to build support from elected officials, work with political partners who support the campaign, and hold those who do not accountable.
- The **research team** is responsible for pulling together information, data, and facts to support the campaign. They ensure that any data being shared is sourced legitimately and correctly. They are critical in identifying and building a case around the bad actors.

None of these teams work in silos, they work together. They can be a combination of staff, paid release members, and/or volunteer teams. It may be that the political team is from a community partner group and the research team is from the local union. Either way, the teams should understand their roles and how they interact with each other.

It is important to note that sometimes a team is one or two people depending on resources, size of the local, and staffing capacity. The different teams should develop the racial justice demands and be able to drive the campaign forward through a racial justice lens.

CENTERING LEADERSHIP OF NATIVE PEOPLE AND PEOPLE OF COLOR:

The term Native People recognizes the first people of this land, having sovereign national and tribal status, as well as a racialized identity. The term People of Color refers to Asian American and Pacific Islander, Black, Latino/a/x, Middle Eastern and North African, and Multiracial populations. It isn't enough to have Native People and People of Color activists in the campaigns. Centering means Native People and People of Color have a leading voice, are listened to, trusted, and have decision-making power within the partnership.

ENGAGE COMMUNITY ALLIES AS PARTNERS IN ISSUE DEVELOPMENT AND THE BARGAINING CAMPAIGN:

Bring in community partners on the ground floor and develop issues, goals, and strategies together. Common good is about building long-term community-labor power.



BUILDING LONG-TERM COMMUNITY-LABOR POWER TAKES TIME.

Community building is an integral part of a Bargaining for the Common Good campaign, which means it takes time to develop, create, build, and move demands forward. It is important to remember that organizing does not end when the contract is settled or the campaign demands are met or won. As shown in the timeline below, before the launch of a campaign, there are a few steps that can take anywhere between six months to a year or more.

COMMUNITY BUILDING IS THE FIRST STEP:

Whether you live in a big city, a suburban town, or a rural community, there are people who care about the same issues and share your values. But to build a sustainable, long-term relationship, work is required upfront. This may include many 1-on-1 meetings, group presentations, follow-up calls, and more follow-up calls, Zoom calls, emails and more follow-up calls. It is not just about building your member list, but also building relationships. What do the leaders care about? Why do they do this work? What problems are their communities facing? What solutions do they see? Where do you share common ground and where do you have differences in your organization?

BASIC STEPS TO A BARGAINING FOR THE COMMON GOOD CAMPAIGN:

This outlines steps starting about 1.5 years before bargaining to after settling the contract. Bargaining for the Common Good campaigns are about building long-term power and changing the power dynamics in our communities, so it is important to think about the work as multi-year that continues after the contract campaign ends.

BARGAINING FOR THE COMMON GOOD ASSESSMENT TOOL:

This tool is to help reflect on how to build and strengthen a Common Good strategy for your organization or union. This will help you assess where to focus your time and resources to build towards developing transformational relationships, running strong campaigns, and winning Common Good demands!

COMMUNITY MAPPING:

Community mapping is about learning about your community and identifying resources and important networks and relationships. Community mapping includes:

- Surveying your membership and identifying where you have existing relationships and connections to community leaders, organizations, and networks.
- Developing lists of key contacts/social networks—this is the organizer's network of power.
- Proactively developing relationships with these existing networks and organizations makes it possible to mobilize their resources around a shared campaign.
- Prioritizing and focusing outreach to build relationships with the networks that most deeply represent the community, not just those that are familiar and comfortable.



Listening Sessions and Community Building



Developing Demands and Identifying Research Needs



Developing Strategy, Budgets and Identifying Staffing needs



Launch Campaign



Escalation, Organizing and Developing Leaders



Negotiation, Organizing and Developing Leaders



Post Campaign Organizing and Developing Leaders

This process can be 6-9 months or longer

This process can be a few weeks to a few months before the campaign is launched

COMMUNITY LISTENING TOURS:

Listening sessions are helpful to build relationships and understand partners' interests, the problems they see in the community, and potential solutions. Listening sessions can be conducted through one-on-one meetings, community meetings, or surveys.

- **Community Listening Session:** Sample list of questions developed by the Saint Paul Federation of Educators (SPFE) to learn more about the community interests and concerns.
- **Community Survey - Family Version:** Survey for families and parents about their interests and concerns.
- **Community Survey - Community Version:** Survey for community members about their issues and concerns.
- **Community Survey:** Sample survey developed by the Fix L.A. coalition.
- **Parent Interviewing:** A sample video of a meeting with parents to better understand their needs opinions, and resolutions.
- **Parent + Small Biz Organizing Conversation:** Sample conversation with questions to engage parents and small businesses.

ENGAGING COMMUNITY LEADERS AND RANK AND FILE MEMBERS:

These are not transactional “we do this for you and you do that for me” relationships. These are sustainable relationships built on trust, respect, and a shared analysis of the conditions and mutual goals to build people power. It is critical that community and labor develop and build the campaign together from the beginning. These relationships will continue after the campaign, so it is important to start with a solid foundation and build with intentionality. This includes:

CREATING A SHARED VISION:

Working with union and community partners to identify priority issues, solutions, and a vision for the campaign is crucial in creating a shared vision. Union members and community partners understand the problems that they are facing in their workplace and communities and have ideas for solutions. It is important for rank and file members and community activists to assist in identifying priority issues and solutions, including why and how it will benefit workers and the community at large, and the vision for building long-term power.

Watch a webinar that shows how a strong community-labor partnership works in action and wins people power! United Teachers Los Angeles former President Alex Caputo-Pearl; Ruby Gordillo, Los Angeles Unified School District (LAUSD) Parent, Rudy Gonzalves of the Los Angeles Alliance for a New Economy (LAANE); Amy Schur of the Alliance of Californians for Community Engagement (ACCE), and other community leaders and parents discuss the strategies and lessons learned from the recent victorious Bargaining for the Common Good campaign and strike.

<https://vimeo.com/319978916>

DEVELOPING A JOINT STRATEGY:

The strategy is your guiding star of how to win the demands. You may choose to launch a corporate campaign, or push the school board to change a policy or a town council to pass legislation, or fight for state funding. All partners must be clear about the pathway to winning and decisions stemming from the strategy. Strategies may need to change if an assessment is made that they are not effective or a campaign may have multiple strategies. For example, a campaign may call on the state legislature to fulfill its constitutional funding requirement for public education and target the corporations that do not pay taxes.

Developing a plan in partnership takes time. There are many decisions to make such as assessments, organizing plans, communications strategies, and more. A written plan is critical to ensure that all stakeholders understand the decisions made, what is happening next, and the campaign progress. Review the following to help develop your campaign plan:

- **Local campaign plan:** A comprehensive campaign planning tool for locals and partners.
- **Power Mapping Activity:** Sample exercise developed by the Colorado Education Association to analyze the power structures, influencers, and stakeholders in your community.

DEVELOPING AN ORGANIZING PLAN:

Organizing gets people fired up (agitated) and identifies what is at stake so that participants understand how the cause is personally relevant to them and take action. At the beginning of a campaign plan, start with mild actions and escalate. Examples of mild forms of action are collecting petition signatures or wearing a union button at the workplace. Strikes or civil disobedience are bold actions.

- Use the issues that are happening in the BCG campaign to motivate members to take collective action.
- During the life of a BCG campaign, members should be able to articulate why they are taking action and what they hope to achieve before taking action.
- Different tactics will be required to move different targets.
- Evaluate in real time if the actions are helping, hindering, or not effective and why.

Escalation tactics or direct actions are important to any campaign that is designed to build long-term power. The goal of escalation tactics or direct actions goes beyond highlighting the problem and getting media attention. Escalation tactics or direct actions have four key elements:

- **ESCALATE THE CRISIS:** Deliver a message that exposes the crisis. Create the narrative about who is responsible for that crisis—target.
- **ESCALATE THE TARGET:** Expose the target; turn the target toxic. Cost the target resources—votes, money, time, influence, etc.
- **ESCALATE YOUR VOICE:** If the target ignores the tactics/actions, escalate the tension on a specific demand. Force the target to choose between ongoing direct action or meeting the demand.
- **ESCALATE YOUR BASE:** Develop and energize your leaders and base.

“Nonviolent direct action seeks to create such a crisis and foster such a tension that a community which has constantly refused to negotiate is forced to confront the issue.”

- Martin Luther King, Jr., Letter from a Birmingham Jail

Possible actions may include:

- Walking out of a meeting en masse
- Speaking to the media
- Calling a meeting of supporters
- Reaching out to parents
- Meeting as a small group
- Striking
- Running a social media profile picture campaign
- Wearing red on Thursdays
- Stickering up
- Circulating a public petition and deliver it to the school board
- Rallying, for example, have staff rally outside school before the start of the school day and walk in together
- Presenting signage and/or protesting in a high-visibility public space
- Red out: staff decorating their rooms in union colors
- Distributing flyers to parents at the school choice fair
- Informational picketing
- Open bargaining
- Setting up lawn signs
- Visiting corporate actors defunding public schools/ supporting charter schools

IDENTIFYING CLEAR ASKS:

Not many people spontaneously get involved. It takes an invitation to participate or an ask for people to take action. Most people will volunteer or donate to a cause that shares their values when asked. In campaigns, the same principles apply. If you can connect to their value systems and the ask is clear and concise, people will get involved. Recruiting activists, rank and file members, and members of the public to join the campaign means having a clear ask and showing why their involvement matters.

Affirm, Answer, and Redirect is a useful organizing tactic when faced with an individual who blocks or objects to the vision of the campaign or action plan.

1. Affirm:

Although you may disagree with the person, or not share their experience, it is important to show that you hear their frustration, and try to understand where they are coming from.

2. Answer:

It is very important to give an honest answer. If you can give them information that responds to their question, or helps them see the issue differently, do it. If you made a mistake, own it. If there is information that you do not know, tell them you will research it and get back to them (and make sure you do).

3. Re-direct:

At the end of the day, the power to win depends on one thing: the involvement of the people—union members and community partners. So look for ways to re-direct their frustration towards participating in a collective project that will help them see that the campaign is powerful (like the next action). Then repeat your ask.

EXPAND THE SCOPE OF BARGAINING BEYOND WAGES AND BENEFITS:

Identify issues that resonate with members, partners, and allies and that impact our communities. Put forth demands that address structural issues, not just symptoms of the problem.

DEVELOP AND DEEPEN LEADERS' SHARED POLITICAL ANALYSIS:

With an intentional approach to developing and deepening leaders' shared political analysis, BCG campaigns move away from short-term mobilization efforts that develop little to no power and instead harness collective power to develop long term and major wins for our schools and communities. This can take form in different ways like short workshops, training sessions, organizing conversations, and more.

Political education should:

- Be grounded in the racial justice demands and explain the racial dynamics that the demands are addressing.
- Articulate a clear connection between Bargaining for the Common Good demands and the problems workers and communities are facing.
- Include space for labor and community partners to share their stories, interests, and lived experiences that build trust and connections across all participants.
- Build activists' confidence and effectiveness in engaging hesitant colleagues and recruiting members of the public to join the campaign.
- Make it clear what is at stake, who the bad actors are, why the target has power, and how the campaign plan will motivate the targets to meet demands.
- Meet people's education level, literacy proficiency, and language needs. It may mean investing in translators and interpreters and/or an experienced popular educator.

EXPOSE THE BAD ACTORS:

Go on offense in your campaign by identifying, exposing, and challenging the real villains; the financial and corporate actors who profit from and increasingly drive policies and actions.

DO THE RESEARCH:

Scarcity politics and financialization of the economy have devastated our communities and schools for decades and driven funding to the one percent. Research to identify who and how divestment happened in your community is key. Groups like LittleSis and Hedge Clippers are good sources to help map out the financial and corporate actors.

Massachusetts Teachers Association (MTA) called on state and federal elected officials to fund public education through progressive revenue. The MTA and its partners identified 19 billionaires in Massachusetts whose wealth grew while state coffers were depleted during the COVID-19 pandemic outbreak. They used the data to agitate and gain the public in support of the campaign's three key demands.

source:

<https://massteacher.org/-/media/massteacher/files/initiatives/education-funding/now-more-than-ever/net-worth-of-massachusetts-billionaires.pdf?la=en>

source:

https://massteacher.org/-/media/massteacher/files/initiatives/education-funding/now-more-than-ever/mta_tax_flyer.pdf?la=en

TARGET THE POWER BROKER:

Identify the decision-makers who can meet the demands. Power mapping can help identify and map the power relationships, who influences power brokers, and your groups' relationships to them. Some general questions to start the identification process include:

- Is it a corporate entity and who in the corporation has the power? Is it the CEO of the bank?
- Is it a government entity? Is it one person or a group of decision-makers? Is it the mayor or city council? Is it the school board?
- Where do they get their power? Who is in their circle of influence?
- What do they care about?

POWER MAPPING:

The Power Mapping tool can help the campaign identify the power dynamics within your community, including allies, opposition, decision-makers, and influencers.



GENERATE PUBLIC SUPPORT:

Building public support is about agitating the public against the bad actors. Be clear in your messaging as to why the bad actor is responsible. Your communications team can help generate stories for traditional outlets like radio and newspaper. Rank and file members and activists can use social media to build up the campaign. The message and narrative should be clear, concise, and consistent across platforms. The following are samples and guidelines for effective messaging:

- Social media posts and news story highlighting the same message:
 - Seattle Education Association
 - Recess, it's important, does your child get enough of it?
- Campaign websites:
 - San Antonio Alliance, Local 67
 - Reclaim Our Schools LA
 - Higher Education Labor United (HELU).
- Messaging and Media Relations Toolkit: Helps develop an effective messaging strategy and build relationships with different news sources
- Digital Best Practices: For Facebook, Twitter, Instagram, and other social media outlets

STRENGTHEN INTERNAL ORGANIZING, MEMBERSHIP, AND MEMBER ENGAGEMENT:

These campaigns must deeply engage the memberships of both unions and community organizations, and there must be opportunities for deep relationship building and joint visioning among the members of the different organizations.

Engaged groups produce transparent, useful, relevant, and frequent member communications, such as printed or electronic newsletters. Most importantly, leaders should be open and transparent, which means producing relevant and frequent updates to keep members engaged and active. You should feel comfortable contacting your state/national affiliate communications department for assistance and best practices.

CONTRACT ACTION TEAM (CAT):

Establish a new internal union network of member activists to engage and activate members using a two-way pipeline of communication. The union's ability to successfully win demands for members and the community depends upon the union's strength and power. Strength and power derive from a solid foundation of organizing union members and community stakeholders that increases activism, engagement, and solidarity.

By creating vital new roles and delegating responsibilities, your local can position itself to build capacity and develop enough power to win demands. It also enables your local to identify new activists and leaders to continue to build on its successes for the future along with a strong and sustainable democratic movement.

STEWARD/MOBILIZER:

Your members, especially your stewards or mobilizers, are crucial to the success of the campaign. This requires continually building the team and communicating with them frequently, so they can organize at their workplace and in their communities. Stewards should have a WhatsApp or Signal group and an email list for their building. They should have a weekly plan of how they will communicate with other members, updates and an action plan for the day or week and an explanation of why the action is important, and a role for the members.

1-ON-1 ORGANIZING MEETINGS:

The heart of organizing is about building relationships, which means 1-on-1 organizing conversations. A strong organizing conversation is not like a chat with a friend or loved one. It's a guided conversation that builds connection, engages people in collective action, and helps develop leaders. When a worksite has good, strong leaders who can educate and move their co-workers into action, it's harder for the boss to pit workers against each other.

10-MINUTE MEETINGS:

A fundamental way to disseminate information and empower leaders at the worksite level is to develop a 10-minute meeting system. Short, concise, and frequent meetings increase attendance. Be sure your 10-minute meetings make time for two-way communication. Campaign updates can easily be broken into basic 10-minute meeting agendas. You can break up complex topics related to contract proposals, legislative initiatives, or policy demands into bite-sized pieces within these meetings. Plus, it allows decentralized conversations and a place for local action-taking/planning for early tactics such as button wearing, petition circulation, etc.

GROUP TEXTS:

Texting is an immediate communication tool for quick updates, reminders, and time-sensitive information sharing, but it does not replace the face time necessary for developing relationships and trust with members and community allies.

Before you send your first text message—remember that there are federal laws that prohibit bulk text messaging. Contact your attorney, as well as your state affiliate or NEA, to learn more about different texting platforms you can use to reach our members and supporters within the law.

WEBSITE/ONLINE RESOURCE:

Creating a landing place for members and allies to reference information can be important for the campaign, but it isn't always necessary. Only use a website if your campaign would benefit from a landing page to publicly post resources or documents. Always add a link or directions for how to take action.

SOCIAL MEDIA:

Use social media platforms that make sense to our audience—members/potential-members and community supporters. It is also a great tool for producing media during various parts of the campaign. NEA offers local leaders and staff a variety of additional [social media best practices](#).

Tools and Materials:

- [Sample 10-minute meeting agenda](#)
- [1-on-1 Organizing Conversation Guide](#)
- [Build the CAT structure](#)

SECTION 2: ELEMENTS OF A BARGAINING FOR THE COMMON GOOD CAMPAIGN

TAKEAWAYS:

- **Bargaining for the Common Good Campaigns are rooted in building people power in our local unions and communities.**
- **The five elements of a BCG campaign are:**
 - **Center racial justice in your demands**
 - **Engage community allies as partners in issue development and the bargaining campaign**
 - **Expand the scope of the bargaining beyond wages and benefits**
 - **Expose bad actors**
 - **Strengthen internal organizing, membership, and member engagement**
- **Community building is an integral part of the strategy and tactics, which means it takes time to develop, create, build, and move forward. To build a BCG campaign, planning begins two years in advance.**
- **We need to clearly express who the bad actors are and ensure there is a clear connection between the bad actors and the demands.**
- **Bargaining for the Common Good campaigns require ongoing organizing, base-building, and leadership development.**



SUCCESS STORIES

3

SUCCESS STORIES

Columbus, Ohio

The Columbus Education Association (CEA) won an agreement to help address racism and racial disparity. As part of their newest contract, CEA earned professional development opportunities for bargaining unit members in the school board's ongoing Strategic Plan.

Source: <http://www.ceaoio.org/wp-content/uploads/2021/06/MOU-Re-2021-2022-School-Year-Final-Signed.pdf>

Jefferson County, Colorado

The Jefferson County Education Association fought successfully to implement a staffing and classroom diversity program, including recruiting and retaining staff that reflects the racial, ethnic, and linguistic diversity of the student body, and a mentorship program for staff of color. In addition, they formed an Equity Accountability Committee responsible for addressing equity in the district, which would engage the school community.

Source: https://cdns5-ss12.sharpschool.com/UserFiles/Servers/Server_627881/File/Print%20Agreement%20JCEA%20Final%2007.2023%20Website.pdf

Minneapolis, Minnesota

The Minneapolis Federation of Teachers (MFT) established the Anti-Bias Anti-Racist Educator Development and Support Council, which set up sub-committees specifically tasked with recommending establishing initiatives for recruitment, retention, and development of educators of color and the improvement of district-wide climate and culture. These sub-committees will continue to work to instill a sense of permanency in anti-bias anti-racist initiatives and development.

Source: https://www.mft59.org/files/ugd/bf7435_4a4f8e-50f33e4777a22b23c598e1641e.pdf

St. Paul, Minnesota

Read about how St. Paul teachers, parents, and students organized for the schools their students deserved and won: "Teacher-Community Unionism: A Lesson from St. Paul: How one teachers union brought parents and students into the bargaining process—and won."

Source: <https://www.dissentmagazine.org/article/teacher-community-unionism-lesson-st-paul>

Seattle, Washington

Following a weeklong strike by more than 6,000 educators of the SEA, a new three-year contract was settled with major wins for both the students and educators of Seattle Public Schools (SPS). Seattle was facing a multitude of systemic problems such as increased class sizes, workload, and staffing cuts; racial inequality of resources and services; unsafe learning and working conditions; unaffordable cost of living for many lower-wage staff; and a looming educator shortage crisis. They established a Joint Task Force for multilingual education and language immersion to improve inclusionary services and student equity and create incentives for teaching.

Source: <https://vimeo.com/208734309>

Sacramento, California

The Sacramento City Teachers Association included parents, business leaders, and community members in their contract negotiations in their bid to make Sac City the destination district in California for students and educators.

Source: <https://www.youtube.com/watch?v=IBPNX-tajjO>

San Diego, California

In coordination with community partners, parents, and students, the San Diego Education Association (SDEA) identified several bargaining goals with a heavy emphasis on racial justice. To address historical divestment across districts in schools located within communities of color, demands will focus on curriculum, ethnic studies, allocation of resources, educator pipelines, restorative practices, and support for educators and students of color. All these issues run parallel to their advocacy for community schools, staffing, and class size. Bargaining by the local is underway as of summer 2023.

Source: <https://www.sdea.net/2023/04/san-diego-community-schools-coalition-demands-more-after-school-opportunities-in-san-diego-unified/>



SECTION 3: SUCCESS STORIES

TAKEAWAYS:

- Victories are feasible in different political conditions but we have to plan and organize.
- Organizing doesn't end when we settle the contract or win the campaign. These victories are possible only if organizing is ongoing.

RESOURCES

4

RESOURCES

ASSESSMENT TOOL FOR RACIAL EQUITY:

Provides discussion questions to have with partners and union members.

RACIAL EQUITY IMPACT ASSESSMENT:

Is used for making decisions with deliberate attention to racial justice, social justice, equity, and inclusion. A guide and protocol for race- and equity-conscious decision-making that is thoughtful, transparent, participatory, and systematic.

BARGAINING FOR THE COMMON GOOD DEMANDS:

Concrete examples of common good demands that unions and community groups have bargained for across the country. Some of these demands have been won in bargaining or outside the negotiations table, and some have only been introduced.

RACIAL JUSTICE DEMANDS:

List of racial justice demands that local unions and community partners can develop together.

BASIC STEPS TO A BARGAINING FOR THE COMMON GOOD CAMPAIGN:

Outlines steps starting about 1.5 years before bargaining to after settling the contract.

BARGAINING FOR THE COMMON GOOD ASSESSMENT TOOL:

This tool helps organizations or unions reflect on how to build and strengthen a Common Good strategy.

COMMUNITY MAPPING:

Worksheet to map out the community networks of members and activists.

COMMUNITY LISTENING SESSION:

Sample list of questions developed by the Saint Paul Federation of Educators (SPFE) to learn about community interests and concerns.

COMMUNITY SURVEY - FAMILY VERSION:

Survey for families and parents about their interests and concerns.

COMMUNITY SURVEY - COMMUNITY VERSION:

Survey for community members about their issues and concerns.

FIX L.A. COMMUNITY SURVEY:

Sample survey to gather information about the community.

PARENT INTERVIEWING:

A sample video of a meeting with parents to better understand their needs, opinions, and resolutions.

PARENT (AND SMALL BUSINESS) ORGANIZING CONVERSATION - GUIDE:

Sample conversation with questions to engage parents and small businesses.

LOCAL CAMPAIGN PLAN:

A comprehensive campaign planning tool for locals and partners.

COLORADO EDUCATION ASSOCIATION POWER MAPPING ACTIVITY:

Sample exercise developed by the Colorado Education Association, which can be used to analyze the power structures, influencers, and stakeholders in your community.

POWER MAPPING TOOL:

Can help the campaign identify the power dynamics within your community, including the allies, opposition, decision-makers, and influencers.

MESSAGING AND MEDIA RELATIONS TOOLKIT:

Designed to help develop an effective messaging strategy and build relationships with different news sources.

DIGITAL BEST PRACTICES:

For Facebook, Twitter, Instagram, and other social media outlets.

NEA GUIDE TO TRANSFORMATIONAL

ORGANIZING CONVERSATIONS:

1-on-1 organizing conversations guide to help you start recruitment conversations and navigate the tough questions that members and non-members raise.

SAMPLE 10-MINUTE MEETING AGENDA:

Sample worksite meeting agenda to help disseminate information and mobilize workers quickly.

BUILD THE CAT STRUCTURE:

Internal union network of member activists.

SECTION 4: RESOURCES**TAKEAWAYS:**

- A compilation of BCG tools and resources developed by NEA locals.
- Includes a glossary of racial justice language. See next page.



GLOSSARY OF TERMS

Glossary of racial justice language

Understanding the context and historical background that many terms convey is essential to encouraging usage that reflects cultural and racial awareness. Using shared language builds a strong foundation among campaign partners, helps prevent translation issues, and empowers workers and activists to speak with confidence and knowledge.

Sources: [Equity in the Center](#) and [Dismantling Racism Works](#)

Affirmative action – This term describes policies adopted since the 1960s that require “affirmative” (or positive) actions to ensure people of color and women have opportunities equal to those of white men in promotions, salary increases, school admissions, financial aid, scholarships, and representation among vendors in government contracts. Although they have been effective in redressing injustice and discrimination that persisted in spite of civil rights laws and constitutional guarantees, these policies have been attacked because of perceived “reverse discrimination.” The Supreme Court has not ruled all affirmative action unconstitutional, but it has limited the use and ways in which policies can be written and applied. See “Reverse Racism.”

Anti-racism – The work of actively opposing racism by advocating for changes in political, economic, and social life. Anti-racism tends to be an individualized approach to oppose individual racist behaviors and impacts.

Civil rights – A group of laws designed to protect various groups against discrimination based on race, sex, religion, age, national origin, and other characteristics. Often used in connection to the civil rights movement, widely recognized as taking place from 1954 to 1968, which included issues and practices such as school desegregation, sit-ins, Freedom Rides, voter registration campaigns, and acts of civil disobedience to protest racial discrimination.

Class – Classism is the systematic oppression of subordinated class groups, held in place by attitudes that rank people according to economic status, family lineage, job status, level of education, and other divisions. One’s race can be a major determinant of one’s social or economic class. The variables of race and class, though closely connected, each need distinct attention.

“Colorblind” – A term used to describe the act or practice of disregarding or ignoring racial characteristics, or being uninfluenced by racial prejudice. The concept of colorblindness is often promoted by those who dismiss the importance of race in order to proclaim the end of racism. It presents challenges when discussing diversity, which requires being racially aware, and equity that is focused on fairness for people of all races.

Colorism – Discrimination based on skin color, which often privileges lighter-skinned people within a racial group, positioning people with darker complexions at the bottom of the racial hierarchy. It is an example of how white supremacy can operate amongst the members of a single racial or ethnic group. This form of prejudice often results in reduced opportunities for those who are discriminated against, and numerous studies have revealed differences in life outcomes by complexion.

Cultural appropriation or “misappropriation” – Adoption of elements of a culture that has been subordinated in social, political, and economic status by a different cultural group. It may rely on offensive stereotypes and is insensitive to how the culture of a group has been exploited by the culture in power, often for profit.

Discrimination – Treatment of an individual or group based on their actual or perceived membership in a social category, usually used to describe unjust or prejudicial treatment on the grounds of race, age, sex, gender, ability, socioeconomic class, immigration status, national origin, or religion.

Diversity – There are many kinds of diversity, based on race, gender, sexual orientation, class, age, country of origin, education, religion, geography, and physical or cognitive abilities. Valuing diversity means recognizing differences between people, acknowledging that these differences are a valued asset, and striving for diverse representation as a critical step towards equity. See “Equity.”

Equity – Equity means fairness and justice and focuses on outcomes that are most appropriate for a given group, recognizing different challenges, needs, and histories. It is distinct from diversity, which can simply mean variety (the presence of individuals with various identities). It is also not equality, or “same treatment,” which doesn’t take differing needs or disparate outcomes into account. Systemic equity involves a robust system and dynamic process consciously designed to create, support, and sustain social justice. See “Racial justice.”

Ethnicity – A socially constructed grouping of people based on culture, tribe, language, national heritage, and/or religion. It is often used interchangeably with race and/or national origin but should be considered an overlapping, rather than identical, category. See “Racial and ethnic categories.”

Hate crime – Criminal acts, motivated by bias, that target victims based on their perceived membership in a certain social group. Incidents may involve physical assault, damage to property, bullying, harassment, verbal abuse, offensive graffiti, letters, or email. Hate crime laws enhance the penalties associated with conduct that is criminal under other laws.

Implicit bias/unconscious bias – Attitudes that unconsciously affect our decisions and actions. People often think of bias as intentional, i.e., someone wanted to say something racist. However, brain science has shown that people are often unaware of their bias, and the concept of implicit bias helps describe a lot of contemporary racist acts that may not be overt or intentional. Implicit bias is just as harmful, so it is important to talk about race explicitly and to take steps to address it. Institutions are composed of individuals whose biases are replicated and then produce systemic inequities. It is possible to interrupt implicit bias by adding steps to decision-making processes that thoughtfully consider and address racial impacts.

Minority/minorities – A term that has historically referred to non-white racial groups, indicating that they were numerically smaller than the dominant white majority. Defining people of color as “minorities” is not recommended because of changing demographics and how it reinforces ideas of inferiority and marginalization of a group of people. Defining people by how they self-identify is often preferable and more respectful. The term “minority” may be needed in specific cases (such as “minority contracting” and “minority-owned businesses”) to reflect data that is collected using those categories. See the term “People of color.”

Mixed race, biracial, multiracial – Generally accepted terms to describe a person who has mixed ancestry of two or more races. Many terms for people of various multiracial backgrounds exist, some of which are pejorative or are no longer used. The U.S. Census first gave the option for a person to identify as belonging to more than one race in 2000, at which time approximately 9 million individuals, or 2.9 percent of the population, self-identified as multiracial.

Multicultural – Involving various cultures in a society, usually with the intent to promote tolerance, inclusion, and equal respect for cultural diversity. Does not include an explicit racial lens. Multiculturalism often focuses on interpersonal interaction and communication between people of different cultures rather than a systemic approach to advance equity.

People of color – Often the preferred collective term for referring to non-white racial groups, rather than “minorities.” Racial justice advocates have been using the term “people of color” (not to be confused with the pejorative “colored people”) since the late 1970s as an inclusive and unifying frame across different racial groups that are not white to address racial inequities. While “people of color” can be a politically useful term, and describes people with their own attributes (as opposed to what they are not, e.g., “non-white”), it is also important whenever possible to identify people through their own racial/ethnic group, as each has its own distinct experience and meaning and may be more appropriate.

“Post-racial” – A term used to describe a time in which racial prejudice and discrimination no longer exist. Deep racial disparities and divisions exist across our society, and some are even widening. Much like the notion of “colorblindness,” the idea of a “post-racial” society does not acknowledge that racism and inequity sit at the core of many of our nation’s deepest challenges. See “Colorblind.”

Privilege – A set of advantages systemically conferred on a particular person or group of people. White people are racially privileged, even when they are economically underprivileged. Privilege and oppression go hand-in-hand: They are two sides of the same power relationship, and both sides of the equation must be understood and addressed. People can be disadvantaged by one identity and privileged by another. See “Intersectionality” and “White supremacy.”

Race – While often assumed to be a biological classification, based on physical and genetic variation, racial categories do not have a scientific basis. However, the consequences of racial categorization are real, as the ideology of race has become embedded in our identities, institutions, and culture, and is used as a basis for discrimination and racial profiling. How one is racialized is a major determinant of one’s socioeconomic status and life opportunities. See “Racial and ethnic categories.”

Racial and ethnic categories – System of organizing people into groups based on their identified race and ethnicity, with categories that may change over time. Data is derived from self-identification questions; however, people often do not get to select the categories from which they must choose, making most methods of categorizing and counting highly political and often problematic.

Racial hierarchy – Ranking of different races/ethnic groups, based on physical and perceived characteristics. Racial hierarchy is not a binary of white vs. non-white, but rather a complex system where groups occupy different rungs of political, economic, and cultural power. Racist ideology relies on maintaining hierarchies, even among racial groups.

Racial justice – The systematic fair treatment of people of all races, resulting in equitable opportunities and outcomes for all. Racial justice—or racial equity—goes beyond “anti-racism.” It is not just the absence of discrimination and inequities but also the presence of deliberate systems and supports to achieve and sustain racial equity through proactive and preventative measures.

Racial profiling – The discriminatory practice by law enforcement officials of targeting people of color for suspicion of crime without evidence of criminal activity, based on their perceived race, ethnicity, national origin, or religion (e.g., “stop-and-frisk”). Racial profiling is ineffective, damages community-police relationships, and is being litigated around the country as a violation of constitutional rights. However, law enforcement authorities at the federal, state, and local levels continue to use racial profiling.

Racial slur – Derogatory, pejorative, or insulting terms for members of a racial or ethnic group. While some slurs, like the “n-word,” are understood as such and are avoided, some slurs are still used in everyday speech, with little understanding of their harm.

Racism – A historically-rooted system of power hierarchies based on race—infused in our institutions, policies, and culture—that benefits white people and hurts people of color. Racism isn’t limited to individual acts of prejudice, either deliberate or accidental. Rather, the most damaging racism is built into systems and institutions that shape our lives. Most coverage of race and racism is not “systematically aware,” meaning that it either focuses on racism at the level of an individuals’ speech or actions (individual-level racism), dismisses systemic racism, or refers to racism in the past tense.

Racist – Describes a person, behavior, or incident that perpetuates racism. Stories of race and racism that focus on personal prejudice (“who’s a racist?”) get a disproportionate share of attention in the media. This reinforces the message that racism is primarily a phenomenon of overt, intentional acts carried out by prejudiced individuals who need correcting and/or shaming and tends to spark debates of limited value about that individual’s character. Media and racial justice advocates should use a systemic lens when producing race-related stories and topics to examine systems, institutional practices, policies, and outcomes.

“Reverse racism” – A concept based on a misunderstanding of what racism is, often used to accuse and attack efforts made to rectify systemic injustices. Every individual can be prejudiced and biased at one time or another toward various people and behaviors, but racism is based on power and systematic oppression. Individual prejudice and systemic racism cannot be equated. Even though some people of color hold powerful positions, white people overwhelmingly hold the most systemic power. The concept of “reverse racism” ignores structural racism, which permeates all dimensions of our society, routinely advantaging white people and disadvantageous to people of color. Structural racism is deeply entrenched and in no danger of being dismantled or “reversed” any time soon.

Stereotype – Characteristics ascribed to a person or groups of people based on generalization and oversimplification that may result in stigmatization and discrimination. Even so-called positive stereotypes (e.g., Asian Americans as “model minorities”) can be harmful due to their limiting nature.

Systemic analysis – A comprehensive examination of the root causes and mechanisms at play that result in patterns. It involves looking beyond individual speech, acts, and practices to the larger structures—organizations, institutions, traditions, and systems of knowledge.

White supremacy – A form of racism centered upon the belief that white people are superior to people of other racial backgrounds and that white people should politically, economically, and socially dominate non-white people. While often associated with violence perpetrated by the KKK and other white supremacist groups, it also describes a political ideology and systemic oppression that perpetuates and maintains social, political, historical, and/or industrial white domination.

White supremacy culture – Characteristics of white supremacy that manifest in organizational culture and are used as norms and standards without being proactively named or chosen by the full group. The characteristics are damaging to both people of color and white people in that they elevate the values, preferences, and experiences of one racial group above all others. Organizations that are led by people of color or have a majority of people of color can also demonstrate characteristics of white supremacy culture.





Campaign Planning

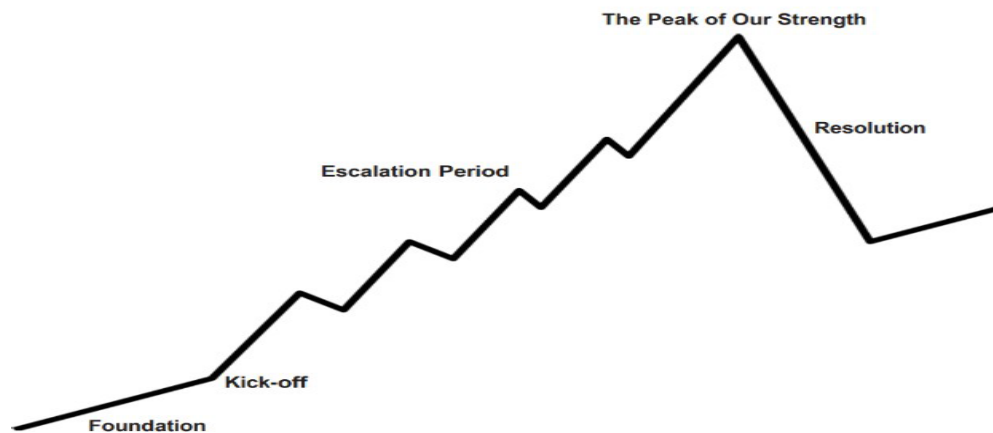


Campaign Mountain
Issues
Power Analysis
Targets
Demands
Tactics

Problem (<i>Big Issue, no clear solution</i>)	
Issue (<i>personal, manageable, specific to the problem needing to be solved with a tangible solution</i>)	
Demand (<i>What is it that we want in order to solve the issue</i>)	
Target (<i>Who has the decision making or resources to solve your problem</i>)	
Allies (<i>supporters on this issue</i>)	
Opposition (<i>do not support you on this issue</i>)	
Competition (<i>want similar resources you are asking for, may share your values</i>)	

CAMPAIGN MOUNTAIN

Phases of a Campaign



Timeline

Tactics (in order) of escalation

Benchmarks for each tactic

Data (*what will you collect and how*)

Campaign Team and Roles (*consider distributing responsibilities*)

Resources to support the campaign

CAMPAIGN PLANNING WORKSHEET

PROBLEM AND ISSUE

Who are my people (constituency)? What change do they need? Why is this important to my people (constituency)?

What is the problem we are trying to address?

What is a concrete solution to one part of this problem? This is our issue.

Is the issue..

- Widely felt and/or deeply felt?
- Winnable?
- Aligned with our values?

Does the issue..

- Build the union and builds leaders?

LEADERSHIP TEAM

Who is currently on the leadership team for the campaign? What are our roles and responsibilities?

Is this team representative of the membership/impacted community? If not, who else should be recruited?

Who else needs to be involved in campaign planning and at which points?

Problems vs. Issues:

Problems are statements of the world as it is. **“There is no respect for educators in this building.”**

Issues are a diagnosis of the problem that almost indicates what the solution is. **“There are no recognized structures in this building that allow educators to be part of decision making.”**

Take some time to first brainstorm the pain and/or problems our people are feeling. Then work to identify the issues within that problem that are causing the pain. Asking, “why do you think this is the way it is?” can move you into an analysis of issues that make up the problem.

Problem/Pain		
Issue	Issue	Issue



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.

- **Has a connection to students and the public.** If the issue affects students, parents and community, it grows your potential group of activists and the potential support.



Issue Criteria Check List:

Score each Issue from 1 to 3 (1 = No, 2 = Unsure, 3 = Yes) on the specific criteria then total your scores and compare with your team.

Will the Issue...	Issue #1	Issue #2	Issue #3
1. Result in a 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 clear timeframe that works for you?			
11. Be non-divisive?			
12. Build leadership?			
13. Set your organization up for the next campaign?			
14. Increase membership?			
15. Be consistent with your values and vision?			
16.			
TOTALS			

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POWER ANALYSIS

Issue Background

What is the history and current status of the issue?

What are the competing agendas or positions on the issue?

What are the narratives surrounding the issue?

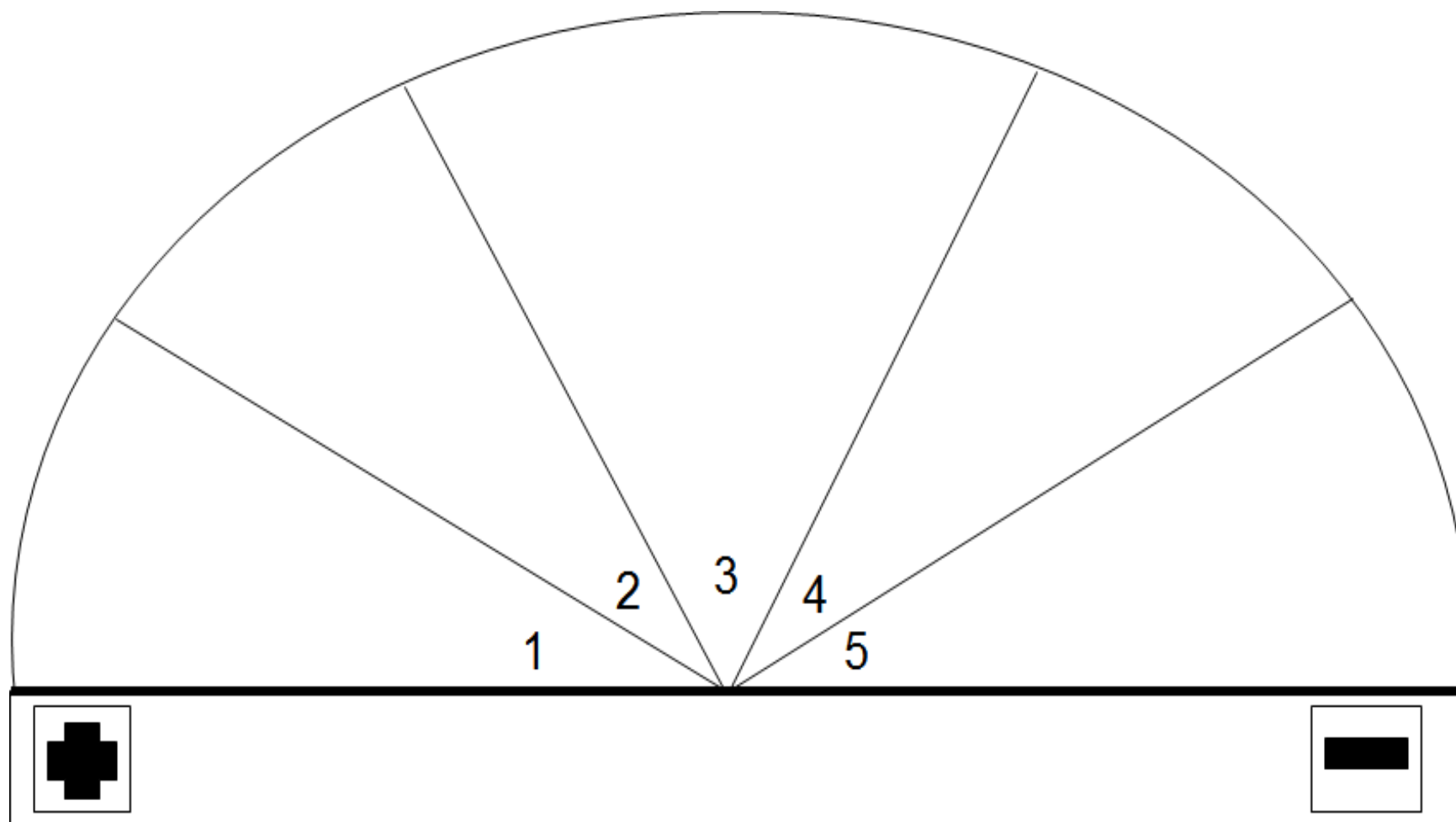
Who are allies on the issue? Who are opponents on the issue?

System Landscape

What are the decision making processes on this issue?

Who is involved in each step of the decision making process?

Problem Statement: _____



Source: Original Source – Training for Change (www.trainingforchange.org) and adapted into five segments by New Tactics in Human Rights.

New Tactics in Human Rights is a program of **The Center for Victims of Torture**

www.newtactics.org • www.cvt.org

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Worksheet: Spectrum of Allies Segments

1. **Active Allies:**

You believe you can already count on them to help you.

If your target falls in this area of the spectrum – your tactics will need to find ways to engage your allies even more actively in working with you toward your goal.

2. **Passive Allies:**

You think they have the same interest, investment or need to solve the problem as you do, and may be close to agreeing with you about your vision, but perhaps may not be able or willing to actively or overtly support you.

If your target falls in this area of the spectrum - your tactics will need to help move them to the “*active ally*” position; increasing their interest and willingness to be active.

3. **Neutral:**

These are people, organizations, institutions that may not know about the problem; may not know about you and your work; have no particular investment in the problem.

If your target falls in this area of the spectrum – your tactics will need to find ways to inform or educate them about the problem and your position in order to move them to a “*passive ally*” position. Examine your tactics to be sure you will not move them toward your opponent’s position.

4. **Passive Opponents:**

These are people, organizations, institutions that you think have some interests that would be opposed to your vision; they may have relationships with people who are actively opposed to you.

If your target falls in this area of the spectrum – your tactics will need to create doubt about their position, raise fears that their position may be “costly” to them in some way. You want your tactics to move them to a “neutral” position and NOT to an active opponent position.

5. **Active Opponents:**

These are people, organizations, institutions that have a big investment in opposing your position (related to power, position, finances, relationships, etc.).

If your target is located in this area of the spectrum – your tactic goal would need to put them into a great dilemma, that any action they would take against you would be very “costly” to them. Your tactic goal would be to move them into a “*passive opponent*” position.



TARGET(S)

Primary Target

- Based on the power analysis, who is the primary target? Who can give us what we want?
- Be specific. A target has a name, a face and an address.

Primary Target Power Analysis

Position • What is the target's position on the issue? • Why is the target taking this position? • What is the target's history on the issue?	Self-Interest • What does the target care about? • What motivates the target to act? • What are the target's goals?
Relationships • What relationship do we have with the target? • Who influences the target? Do we (or our allies) have a relationship with any of them? • Who are the target's allies and opponents? • To whom is the target accountable? Is the target elected or appointed? • Who are the target's base of support?	Power • What power does the target have and where does their power derive from? • How do they organize people? • How do they organize money and resources?

Draft your Demand - What is the win that we want?

What is our demand? How will we know if we've won or not (it needs to be something we can see or touch that makes our lives better)? Remember – it's concrete. The win of this demand will result in visible, significant change in your constituent's daily lives.

1. Is it concrete (measurable)?
2. Does it make a visible impact in people's lives (meaningful)?
3. Does it leverage YOUR resources creatively and make for a good story (motivational)?
4. Must you organize and distribute leadership in order to accomplish?

Ex. LEA wants to secure a fully funded budget by demanding a 1-penny increase in the property tax formula by April 1st 2018.

Our Demand – Our Win is...

Identify the Target – Who can give you what you want?

Who is the target of your campaign efforts? A target has a name, a face, and an address. Who has the power to prevent you from getting your demand?

Our Target – Has the power to give us...

STRATEGY AND TACTICS

Brainstorm tactics that will put pressure on the target(s).

Name how each tactic would disrupt the target(s)'s self-interest, relationships, or power.

List the tactics above which meet the criteria below:

- Put pressure on the target (push them out of their comfort zone)
- Build our power (develop our leaders and bring more people into the campaign)
- Are strategic (make good use of our resources to put pressure on target)



CHECKLIST: CHOOSE TACTICS THAT FIT

Your escalating campaign is made up of many tactics. A tactic could be mild, like a survey, or militant, like a work slowdown. It could be traditional, like a picket, or it could be a creative stunt a member just dreamed up. When your group is weighing what tactic to try next, here are some factors to consider:

- 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?

Sample Tactics⁵ — To be used by a local union or a regional or statewide campaign with localized actions.

Basic	Moderate	Advanced
➤ Coordinated buttons in the worksite or armbands (cheaper option) ➤ Hand out information at school events ➤ Sign employee petitions ➤ Coordinated visibility (clothing, union shirts, signs in cars or classrooms, etc.) ➤ Basic education with members on bargaining process and unsettled issues via 10 minute meetings, smart and concise written communications, short videos, etc. ➤ #RedforEd Days to repeat coordinated actions and use the color of red – national solidarity color for educators ➤ Regular worksite meetings that are well publicized ➤ Request financial information from employer or state on budget, management salaries and benefits, outside lawyers, etc. ➤ Membership drive to build member density ➤ One on one campaigns to assess member readiness and educate/agitate members to take action ➤ Small member delegations to board meetings or legislative committees to speak to the outstanding issues ➤ Phone bank members and other bargaining unit members to address questions and educate/agitate for solidarity ➤ Power map board members or key regional or state leaders and community to understand their interests and pressure points ➤ Coordinate member postcards or letters to targets (publish their contact information) ➤ Use the #RedForEd hashtag ➤ Encourage members to share photos of actions on their social media platforms	➤ Solidarity buttons in the community ➤ Create songs about our issue ➤ Informational picketing as large groups in public or at specific events with the employer such as bargaining or board meetings, including a "gauntlet" style layout where the employer must walk past members ➤ Votes of no confidence in the employer/decision-maker ➤ Votes of confidence in the union bargaining team ➤ Phone bank and letters to community members and parents to educate/agitate around the issues ➤ Phone bank and letters to fellow NEA members in area who do not work for the employer, other unions and ally organizations. ➤ Flood board members home mailboxes with postcards – one per member with a unified message ➤ Encourage community members to write messages to board members ➤ ArtBuild ➤ Picket sign creation ➤ Hold more frequent press conferences and press worthy events (highly visible activities) ➤ Create a community e-newsletter to send updates ➤ Organize coffee klatches ➤ Post lawn signs in the community ➤ Place ads in the school athletic programs and parent newsletters ➤ Keep track of the employer's spending on anti-union activities, outside lawyers, etc. and make it public. ➤ Go door to door with leaflets in the community ➤ Consider a boycott of key businesses owned by board members or supporting management. ➤ Larger delegations of members at board members ➤ Organize building-based solidarity events such as walk-ins before work begins ➤ Create a community petition and/or pledge cards ➤ Create community flyers and share them at supportive businesses (on counter) or leaflet popular community events such as farmers' markets, recycling centers, etc. ➤ Launch social media channels and post regularly to update the community ➤ Put floats in local parades sponsored by the union ➤ Hold press conferences ➤ Create shareable social media graphics ➤ Leaflet large school events like athletic games ➤ Set up informational booths at local events such as fairs, farmers markets, etc. ("truth booths") ➤ Launch a landing page website ➤ Meet with community organizations with an interest in students ➤ Encourage other unions in the area to picket and act in solidarity ➤ Consider work-to-rule tactics that impact management, but not students. These tactics include leaving or arriving at work when the day begins, resigning from voluntary committees, passive participation in faculty/staff meetings, etc.	➤ Large community or regional or state rallies ➤ Organize and participate in parades ➤ Organize a speakers' bureau to go to community events ➤ Marches on the employer/decision makers ➤ Occupying a decision-maker meeting ➤ Member and community delegations to speak at board meetings ➤ Show collective resistance at staff meetings through passive participation ➤ Pack up personal property from classrooms and offices ➤ Picket board members' houses/work ➤ Organize coordinated walk-ins on the same day across a region ➤ Banner drops ➤ Civil disobedience (be sure to consult with your union's legal counsel) ➤ Take over board meetings ➤ Hold "sleep ins" during bargaining sessions ➤ Hold large membership rally prior to school board meeting, then pack the room ➤ Attend critical bargaining meetings such as mediation or fact finding hearings and make sure board members see/hear us ➤ Find and open a strike HQ ➤ Hold a strike informational meeting for potential striking unit and other employees potentially impacted by a strike ➤ Train picket captains ➤ Ask athletic coaches to suspend games and work if there is a strike ➤ Reach out to area colleges to ask student teachers not to come to work if there is a strike ➤ Phonebank area substitutes to ask them not to take work at the school in the event of a strike ➤ Hold a strike authorization vote ➤ Hold community forums in-person or virtual town halls ➤ Hold neighborhood based meetings with parents and concerned community members ➤ Translate community outreach materials and go to communities with translators to meet with non-English speaking communities ➤ Work with community organizations to develop proactive plans to support vulnerable students in the event of a strike ➤ Consider a Facebook live to update the community on actions.

⁵ See Tactics Manual WEAC.doc in resource section.

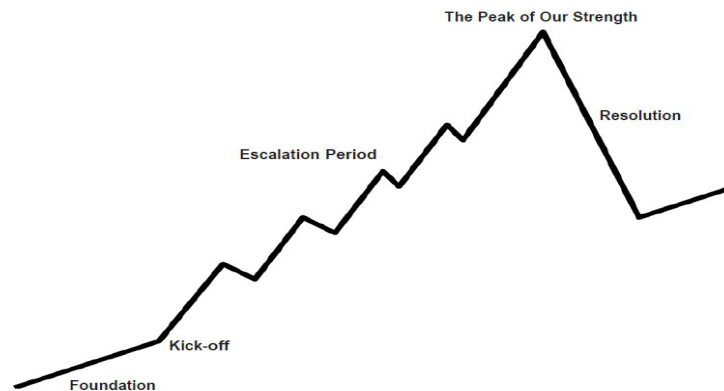
Number the tactics above in order of escalation:

Think about how much participation, resources, and risk each tactic requires, as well as how much pressure it will put on the target(s).

Keep reviewing this list throughout the campaign. Remember that each implemented tactic gives us more information about the readiness of our members for the next step and how much pressure the target(s) can sustain. Use this information to inform the next tactic.

CAMPAIGN MOUNTAIN

Phases of a Campaign



COMPRESSION POINTS

What are the key dates to plan the campaign around?

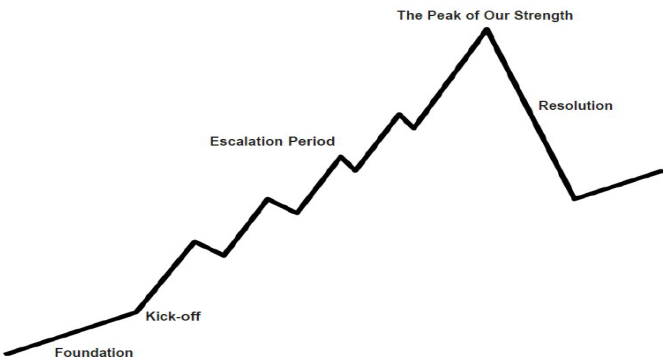
This can be either externally set dates (board meetings, breaks, etc) or internally set dates (deadlines we give to the target).

Campaign Assessment Tool: After Action Review

Rating	1	2	3	4
Widely Felt	We thought the issue would resonate, but it didn't.	The issue resonated with some workers.	The issue resonated with a majority of workers.	The issue resonated with a strong majority of workers.
Deeply Felt	The issue did not feel urgent to the workers.	Some workers felt urgency, but most would not engage in any but the least demanding tactics.	A strong majority of workers were motivated to take at least one action, but we lost steam as we escalated.	A strong majority were willing to take multiple escalating actions in order to win.
Winnable	We did not identify a winning strategy (or the issue turned out to be winnable without collective action).	We identified a strategy that led to a partial victory.	We identified a strategy that led to victory.	We identified a strategy that led to a victory even beyond what we had expected.
Builds the union and builds leaders	We are not any stronger as a result of this issue fight, and may even be weaker.	Some leaders engaged with the campaign, including a handful new to the cause. The union's reputation and credibility was not significantly enhanced.	Most leaders in the relevant constituency group for the action engaged with the campaign, including ones new to the cause. The union's reputation and credibility increased as a result of the issue fight.	Most leaders in the relevant constituency group for the action participated robustly in the effort, including ones new to the cause. The union's reputation and credibility increased significantly as a result of the issue fight.

CAMPAIGN PLAN TEMPLATE

Phases of a Campaign



Issue:	Target(s):
Demand:	Goals:

	Foundation	Kick-Off	Escalating Peaks				The Peak	Resolution
Timeline								
Milestone (Name the important phases of the campaign)								
Key Tactics								
Benchmarks (How do we measure success? Specific and measurable)								
Key Tasks (What do we need to do in order to achieve the benchmarks?)								