

Campaign Academy: Coaching and Leading Winning Campaigns Baltimore, 2025



Documents you Will Need Today

- › Basics of Coaching Module – Coaching as a Leadership Practice
- › Basics of Coaching Module - Campaign Planning Coaching Guide



**Campaign
Planning
Coaching
Guide**

Indicators
Processes
Interventions
Questions



Campaign Academy

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TODAY'S AGENDA AND OUTCOMES



- 7:30-8:30 Breakfast
- 8:30-Noon Coaching and Teams
- 12:00-1:00 Lunch
- 1:00-4:30 Campaign
- 4:30-5:00 Networking and Adjourn

Coaches and Mentor Coaches will understand the Campaign Cycle Planning document and how to coach into it.

Community Agreements

Using Self-Awareness and Self-Knowledge

Listening for Understanding

Being Gracious

Staying Engaged

Being Open and Suspend Judgment

Saying “I”- tell your truth

Lean into Discomfort

Reaching Empathy

Expecting Non-Resolution and Non-Closure

*

Adapted from “Embracing equity and inclusion”, Annie E. Casey Foundation

Our Coaching Lineage



Remember a
time...

At your tables:

Share a little about your experience:

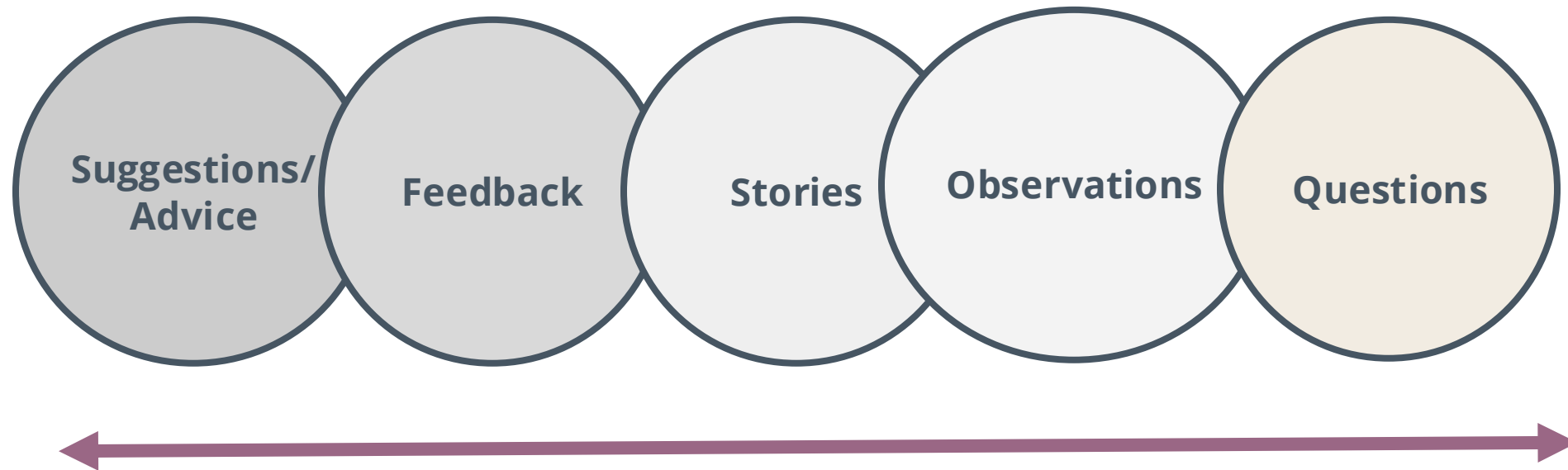
What did the coach (or other person) do?

What qualities did they demonstrate?

Possible Interventions

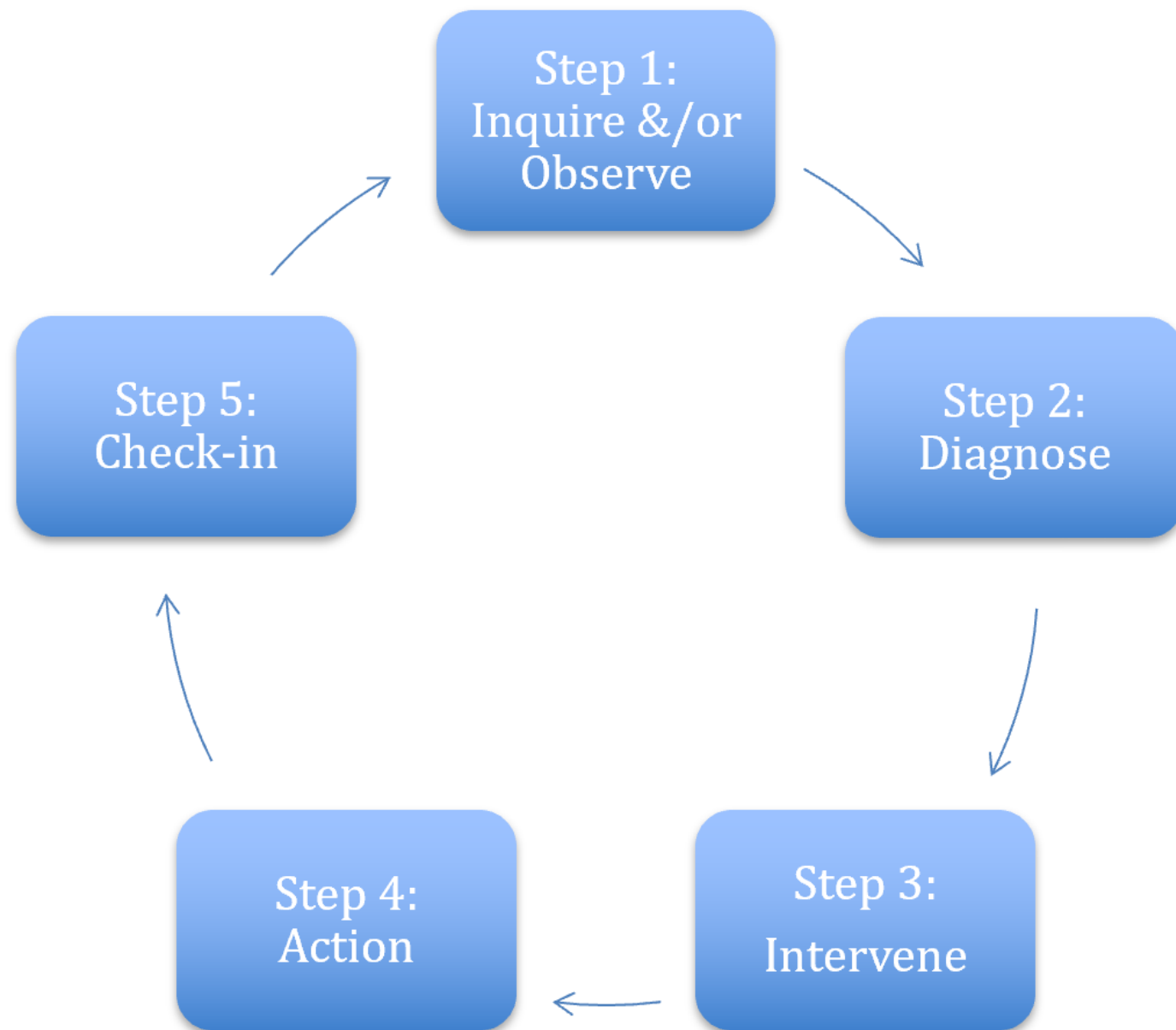
***Coach
Centered***

***Campaigner
Centered***



Coaching Cycle

- › The reason to apply this cycle is to stop yourself from providing THE answer.
- › Leaders grow from productive struggle.



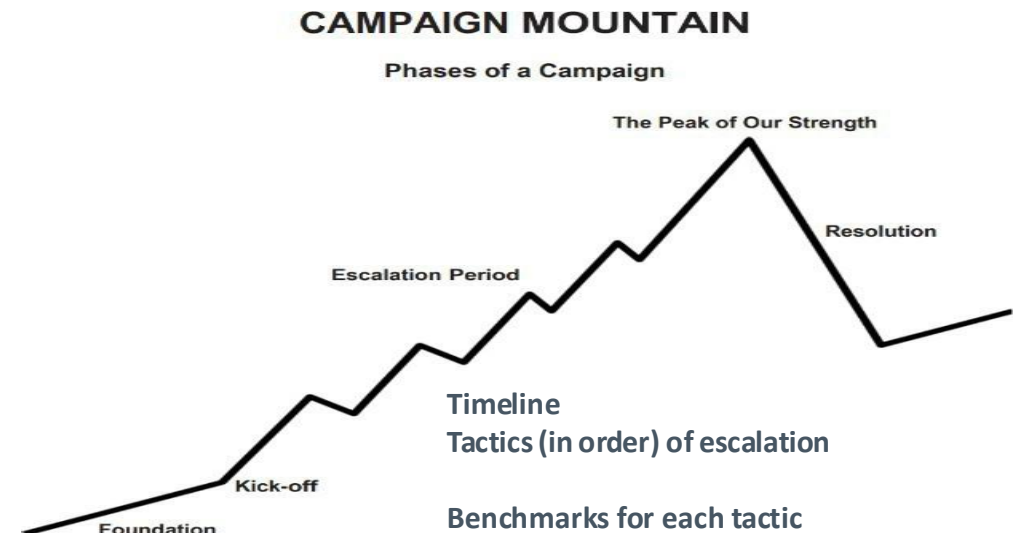
Campaigners can...

- ❑ Read a political landscape
- ❑ Assess their potential allies and opponents
- ❑ “Cut an issue” from a big problem to a set a of winnable (local) demands
- ❑ Pick fights that will build our base and develop new leaders
- ❑ Use a tactic sequence to create a crisis for our targets

COACHING CAMPAIGN CYCLE PLANNING



Centering Equity
Leadership Team
Problem and Issue Identification
Target and Demand
Power Analysis
Allies
Communication
Strategy
Tactics
Metrics



Key Point



“I have always thought that what is needed is the development of people who are interested not in being leaders as much as in developing leadership in others.”

Basics of Coaching



REMINDER Why is coaching critical to a winning campaign?



- › Coaching is a direct intervention in an individual or team's work process to help them improve effectiveness.
- › Coaching enables others to build their own capacity to act.
- › Coaching transforms leaders from a relationship where someone else has external control to one where they focus on how to grow.

3 Categories of Coaching Interventions

- › Motivational - Heart Coaching aimed at enhancing motivation
- › Strategic – Head Coaching aimed at helping plan, evaluate, strategize
- › Skills-based – Hands Coaching aimed at effective



REMEMBER - Coaching Across Differences



1. Curiosity and Compassion
2. Develop you Own Emotional Intelligence
3. Invite Conversations about Differences

Coaching Questions to Ask

- › What do you need me to understand about your identity in this work?
- › What would you like to know about me that would help you to work with me?
- › Tell me a story that will help me understand a part of your identity that you feel impacts you in this work.
- › What might be challenging about us working together?
- › What can I do to support you when those challenges arise?

Coaching Pairs



Regroup

- You will need to get into groups of 2.
- Problem of Practice or Challenge
- Two 20-Minute Rounds
 - Structure:
 - Coachee presents Problem of Practice
 - Coach begins inquiry and diagnosis
 - Coach moves to debrief and monitor



Debrief in Pairs

- › What Category of Intervention did you diagnose?
- › What did you feel successful with as a coach or coachee?
- › What would you change the next time you coach/are the coachee?
- › What is a key takeaway from this for the next time you are coaching a Campaign Coach and/or Team Lead?

Key Points



- › Coaching is about releasing your external control and enabling the leader to grow.
- › Coaching is as much about you changing your behavior and growing your skill as it is about growing a leader.
- › We only get good at coaching by practicing it.

Coaching Into Team Development

pg. 4 in Basic of Coaching Guide
AND

pg. 31-41 in Participant Handout
Module

Ellen and Halimah

EFFECTIVE TEAMS

CONDITIONS

Bounded

Stable

Diverse



STEPS

Purpose

Community
Agreements

Roles



MEASURES

Goals

Capacity
(Team)

Learning
(Individual)

PURPOSE

Goal

What?

Constituency

Who?

Activities

How?

COMMUNITY AGREEMENTS

Decisions

Commitments

Time

ROLES

Outcomes

Capacities

Constituencies

DEVELOPING A SHARED PURPOSE

OUR PEOPLE
ARE...

OUR TEAM'S
PURPOSE IS TO...

WE'LL ACHIEVE
OUR PURPOSE
BY...

WHO?

WHAT?

HOW?

TEAMS - SHARED PURPOSE

STEP 1 - first draft (individual work) — 3 min

STEP 2 - (group work) — (8 min)

*Include **what** your team is striving for, **who** you will organize, and how you'll do it - the kinds of organizing activities you will engage in*

<u>NAME</u>	<u>WHO?</u> <i>Your constituency's characteristics</i>	<u>WHAT?</u> <i>Your team's reason for coming together</i>	<u>HOW?</u> <i>Specific organizing activities</i>

STEP 3 - SHARED PURPOSE - second draft (*individual work*) (3 mins)

Include *what* your team is striving for, *who* you will organize, and *how* you'll do it - the kinds of organizing activities you will engage in

Team Member:

Team Member:

Team Member:

Team Member:

STEP 4 - SHARED PURPOSE - final draft purpose sentence (*group work*) (5 mins)

*Include **what** your team is striving for, **who** you will organize, and **how** you'll do it - the kinds of organizing activities you will engage in*

Decision-making: What is the process by which we will make decisions?

- **Majority rules:** Whatever gets the most votes wins.
- **Consensus:** Everyone must agree.
- **Delegation:** Nominate one or two people on your team to be the ultimate decision-makers.
- **Coin flip:** Leave the decision to fate!
- **Fist to Five:** Show a number of fingers to indicate whether you are in favor (five) or opposed (fist) to the proposal at hand.
- **Other:**

Discussion and Decision-making: How we will discuss options and reach decisions as a team to ensure vigorous input and debate?

Always Do

Engage in open, honest debate
Ask open-ended questions
Balance advocacy with inquiry

Never Do

Engage in personal attacks
Fail to listen to what others say
Jump to conclusions

Meeting Management: How will we manage meetings to respect each other's time?

Always Do

Start on time; stay on time
Be fully present throughout the meeting
Listen attentively

Never Do

Come to meetings unprepared
Answer mobiles or do email

Accountability: How we will delegate responsibilities for actions and activities? How will we follow through on commitments?

Always Do

Provide follow-up on action items (have a goal checklist)
Ask for/offer support when there is a need
Weekly check-in

Never Do

Assume you have agreement
Assume tasks are getting done
Commit to a task that you know you won't do

Accountability Agreement:

****Regular meeting time:**

Role	Responsibilities	You would be good for this role if you . . .Criteria?	Interested Team members & Related Skills/Talents
Team Coordinator			

Understanding Team Roles (10 min.):

Review the Team Coordinator role below as an example of what roles might look like in your individual campaigns. Thinking about how you should organize your constituency, discuss how your roles would fit together to create an interdependent leadership team that supports one another in your project. What would each role have to be good at? Based on the discussion about the roles, **go around the circle** and ask each person to tell others: **1) what experience and talents they have** that might contribute to the leadership team and **2) what specifically they want to learn in more detail (30 seconds each)**. How might these talents match up to particular roles? Are there any clear “fits”?

Note: These team roles should not be seen as permanent. For the team to be strong, all leaders should have to earn leadership by carrying out responsibilities relevant to the role they seek.

Coaching it Up

- › How will you know that there is something not working around an aspect of the Leadership Team?
- › What possible observations could you see?
- › What questions could you ask the team lead?
- › What are intentional interventions you might take?

Key Points



The leadership team structure supports the campaign's interests by meeting goals, and meeting each individual's interests by giving them opportunities and support to learn and develop.

If your team is not meeting these criteria then you need to return to the foundational blocks and refocus.

Your role is to support and develop the team.

Coaching into Problem and Issue

pg. 5 in the Basics of Coaching Guide
AND

pg. 42-45 in the Participant Handout

Halimah and Ellen

PROBLEM vs. ISSUE

A problem is the whole pie. Problems are vast, complex, and entrenched.

When we try to tackle a problem, we reinforce the hopelessness of the situation. We are trying to take on the full pie all at once.

Issues are the pieces of the pie. It's a small chunk of the larger problem that we can make progress on, and in turn we are slowly taking on the full problem over time.



Issue

An ***issue*** is a slice of the larger problem that is manageable and solvable.



PROBLEM

vs.

ISSUE



Values

Values are fundamental beliefs that dictate behavior

Ideally, Unions advance the welfare of all members.

They are based on the universal ideal of human rights, the idea of justice, progress, and betterment of self and of society.

Through shared values, members build solidarity and commit to active participation in the labor movement.

Shared values transform individual members into part of something larger than themselves.

Some Union Values

Fairness, honesty/integrity, responsibility, compassion/empathy, safety, health, generosity, hard work/responsibility, community, freedom, democracy, binding contracts, equality, opportunity, respect, stability/security, unity, quality work, justice, collective action, dignity/respect, charity/community service, and due process.

How to Link Issues and Values

Investigating member issues is necessary but not sufficient – we also need to identify workers' **SHARED** values –

WHY is this an issue?

WHY do you want to fix this?



EXAMPLES- Problems to Issues + Values

VALUES – Public Schools should be safe, equitable, and inclusive learning and working environments for all people.

PROBLEM -Our school is hostile to LGBTQ+ staff and students

- **Issue Cut** – There are no gender inclusive bathrooms and/or transgender students and staff are forced to use the wrong restroom.

PROBLEM - Our school reinforces racism by silencing protestors

- **Issue Cut**– We need to stop law enforcement from arresting students and staff for exercising their Constitutional rights.

Key Points



- › Problems are big conditions of injustice
- › Issues are the smaller member identified components that make up the problem
- › Issues indicate a path to action
- › Values build a relatable why across people experiencing the pain of the problem
- › We intentionally work to connect members around issues and values to build Solidarity

Assessing Our Issues

☐ Widely felt and/or deeply felt.

- The pain can be felt by just one, but the injustice of that pain is shared by many.
- The pain AND the injustice of that pain is felt by many.

☐ Winnable.

☐ Builds the union and builds leaders.

☐ Has a connection to students and the public.

Issue Criteria Checklist (as a resource)

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			

TEAM WORK

Review the Tools on Problem into Issues on Page 42-45 in Participants Handout and Page 5 in the Basics of Coaching Guide

Coaching it Up

- › How will you know that there is something not working around an aspect of the Problem or the Issue?
- › What possible observations could you see?
- › What questions could you ask the team lead?
- › What are intentional interventions you might take?
- › What are the ways that you have coached teams selecting the issue that was right for them?

Key Points



- › Problems are big conditions of injustice
- › Issues are the smaller member identified components that make up the problem
- › Issues indicate a path to action
- › Values build a relatable why across people experiencing the pain of the problem
- › We intentionally work to connect members around issues and values to build Solidarity
- › **Not Every Issue is an Organizing Issue**



Target and Demand

Pg. 47 of Participant Handouts and

Pg. 8-9 of Coaching the Plan

Zac and Amanda

A Target Is

The person with the power to give you what you are demanding.

This person

- . Has a name
- . Has a face
- . Has an address



Problem of Practice- Identifying the Target

Coaching Triad:

1 coach, 1 coachee, 1 observer

What did the coach (or other person) do?

What qualities did they demonstrate?

Key Points



- › A target is a person with a name
- › They are the one who can grant your demand



Crafting Demands

Pg. 47 of Participant Handouts and
Pg. 8-9 of Coaching the Plan

Zac and Amanda

A Target Is

The person with the power to give you what you are demanding.

This person

- . Has a name
- . Has a face
- . Has an address



Demand

This should be an **agitational phrase** that creates a **moral crisis** (connected to values) for the listener and demands **action**

Demand

“Hey **TARGET**,
we demand **ACTION**
because **HARM or IMPACT!**”

Coaching up Power Analysis, Target, Demand

- › “Hey Superintendent Sam: We demand gender affirming bathrooms in every school because all students need to feel safe and included in our schools. ”

Coaching up Power Analysis, Target, Demand

- › “We demand safe and inclusive spaces for all staff and students!” lol or like Wear Red for Ed!!

Teamwork

Table talk - How could you coach a leader/team to a more effective demand?

What other examples have you heard, and how did you coach them?



Key Points



A powerful demand makes clear who has the power to make the change that's needed

- › We can only build a powerful demand when we have taken the steps to accurately identify the issue and determine who has the power to create change

Coaching Into Power Analysis

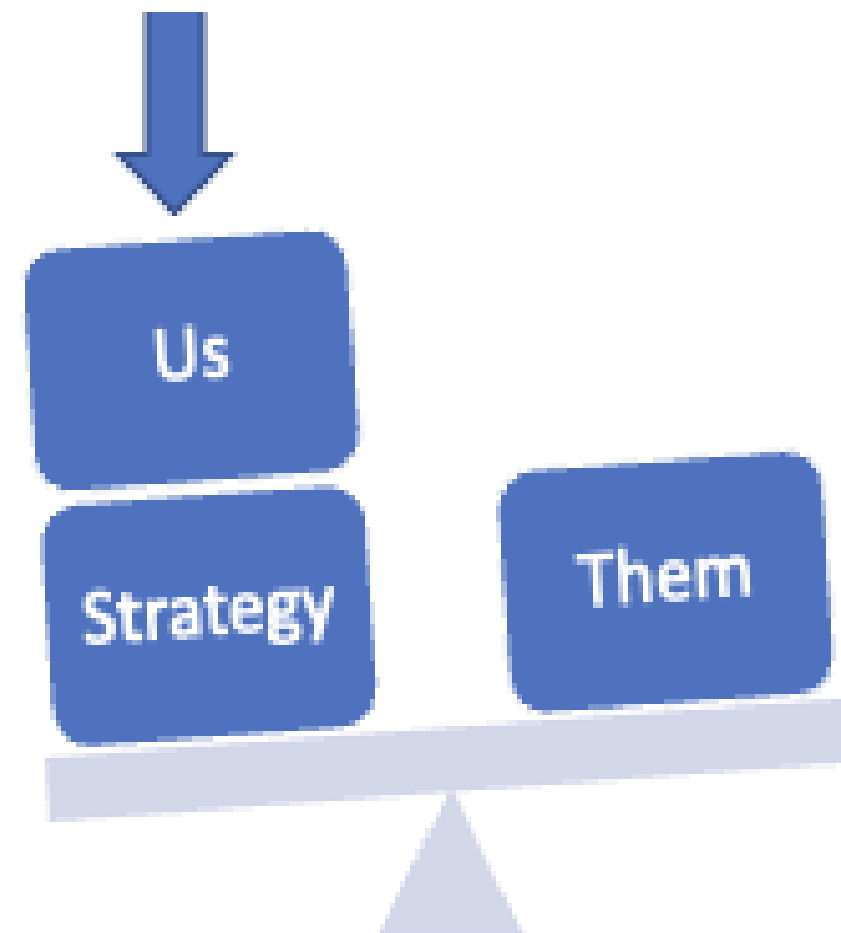
Pg. 7-9 Coaching of Plan

Pg. 46-47 of the Participant Handouts

Zac and Amanda

Purpose of Power Analysis

1. Understand how (& by who) power is exercised to cause and maintain the problems & conditions that we seek to change
2. Develop effective strategies for:
 - Permanently altering power relationships in favor of the people suffering from the problems & conditions that we seek to change
 - Grassroots organizing to build power
 - Issue campaigns that BOTH help to build power AND win change
 - Connecting short term activities to LONG TERM goals



Process of Power Analysis



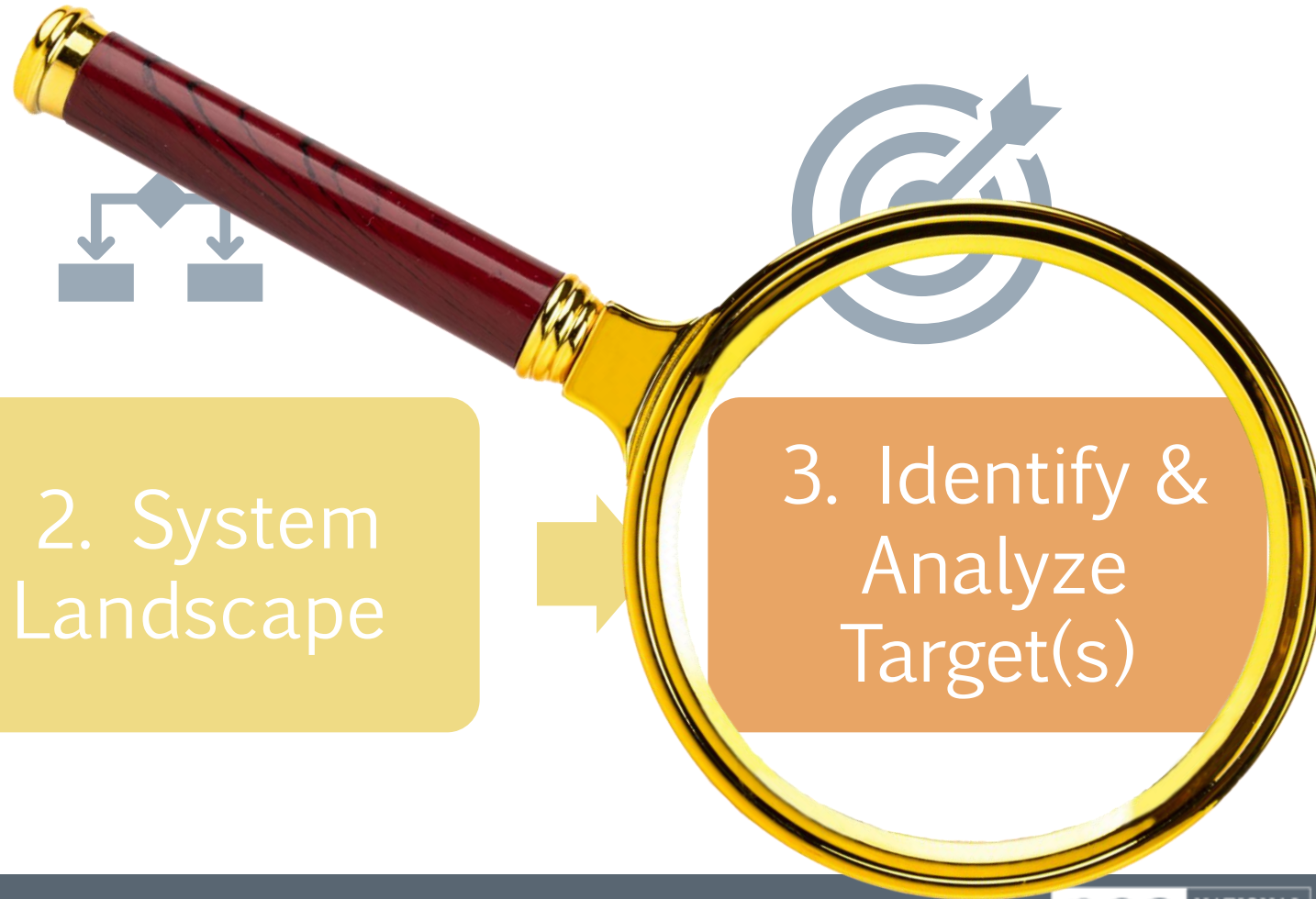
1. Issue
Background



2. System
Landscape



3. Identify &
Analyze
Target(s)



A Target Is

The person with the power to give you what you are demanding.

This person

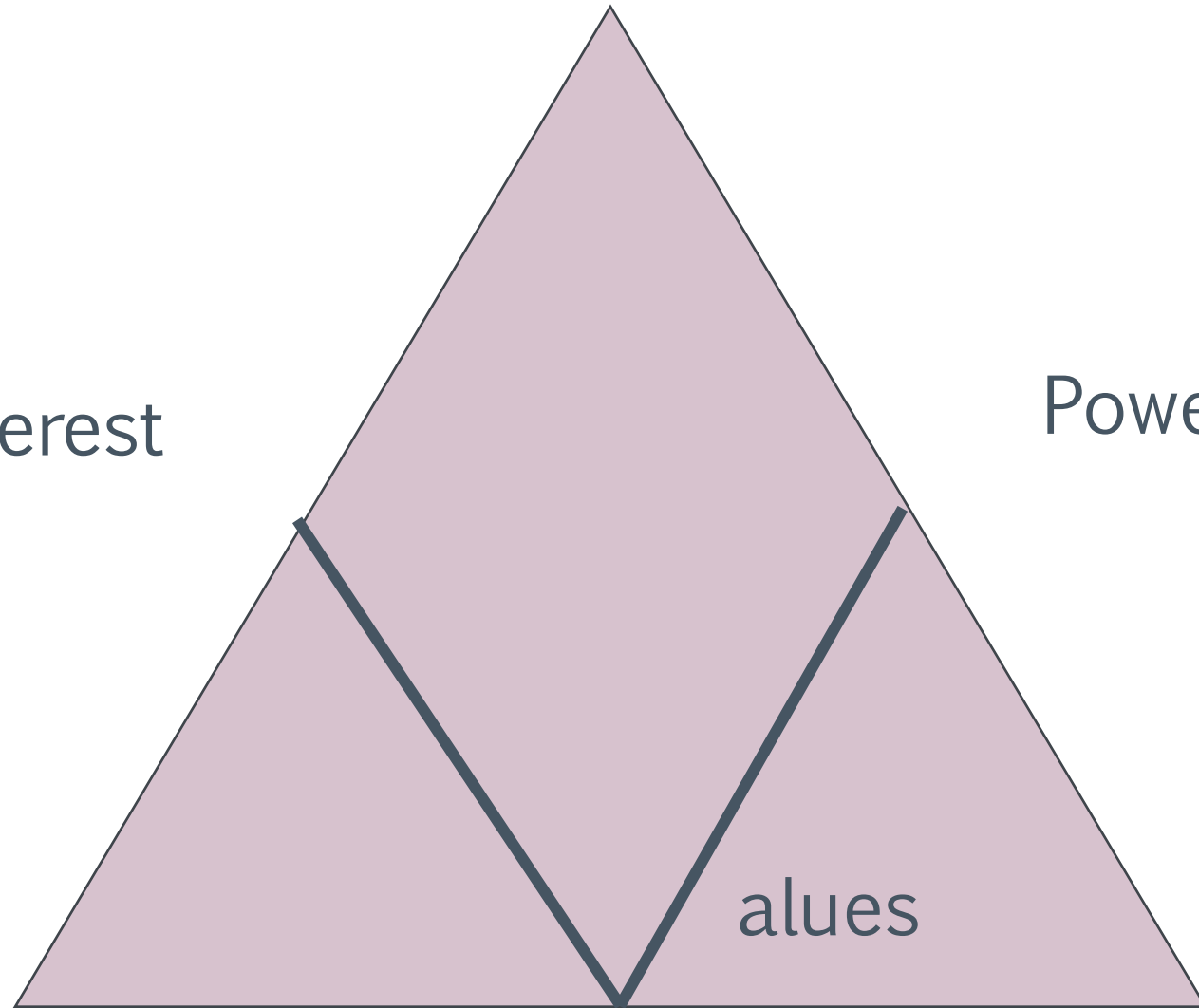
- . Has a name
- . Has a face
- . Has an address



Values Triangle

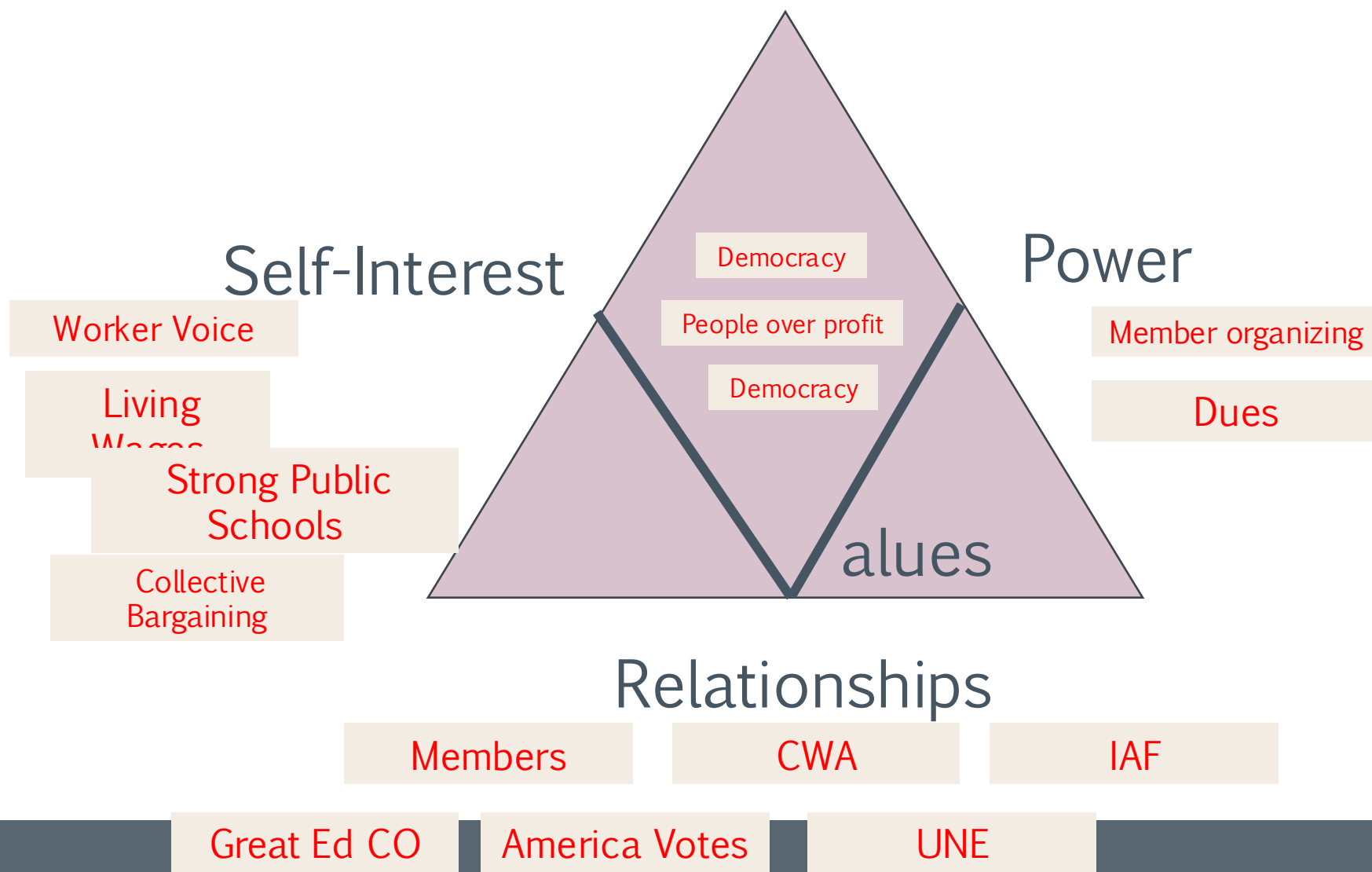
Self-Interest

Power



Relationships

Values Triangle



Coaching Up Target, Demand, and Power Analysis

Key Points



During a campaign, understanding the values, self-interest, and power of those who we need to influence helps to underpin and strengthen our strategy, increasing our likelihood of success.



Coaching into the Spectrum of Allies and Messaging

Pg. 10-12 of Coaching the Plan

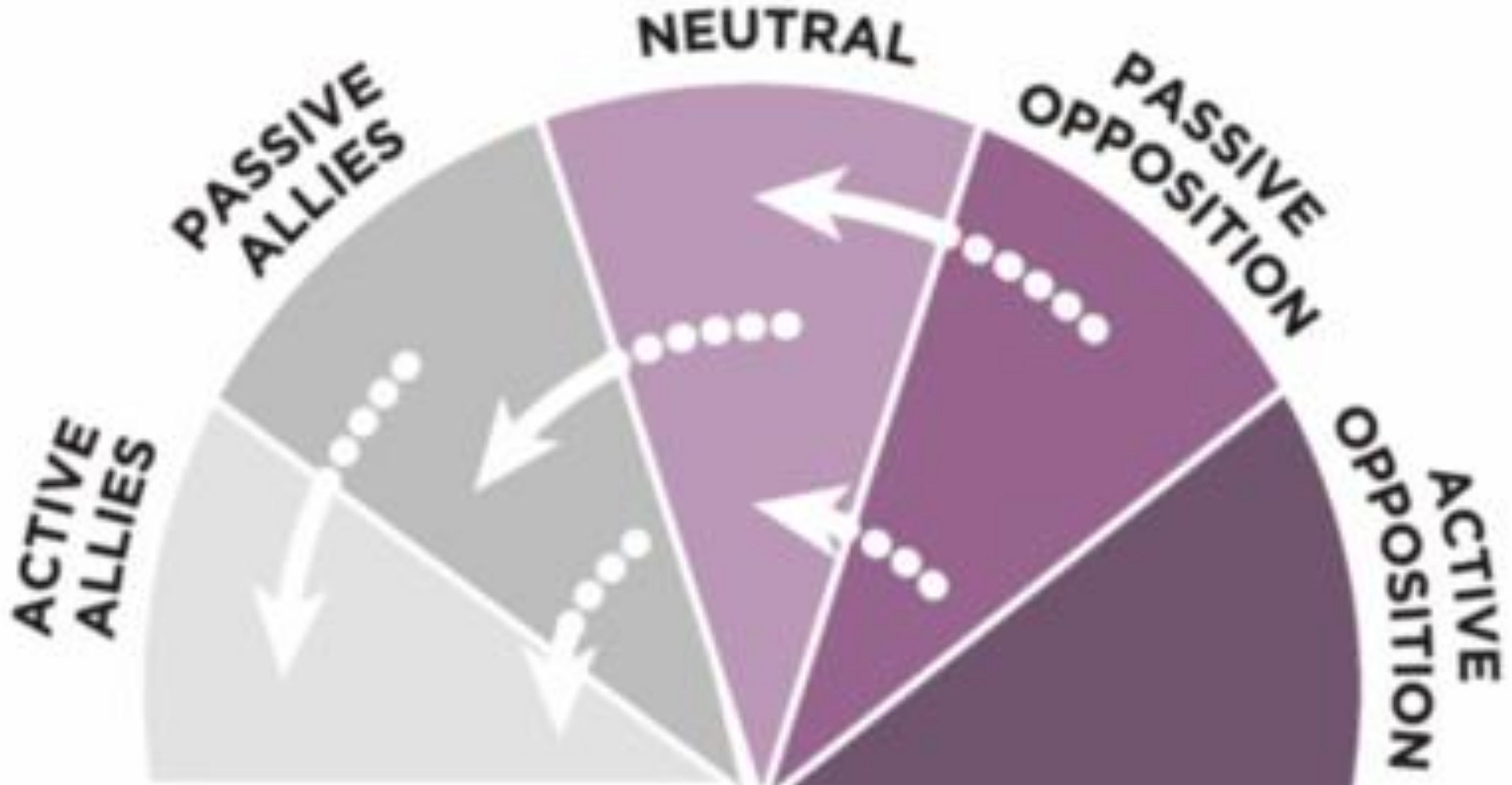
Pg. 48-50 of Participant Handouts

Albert/Halimah/Carrie

Keep it in mind...

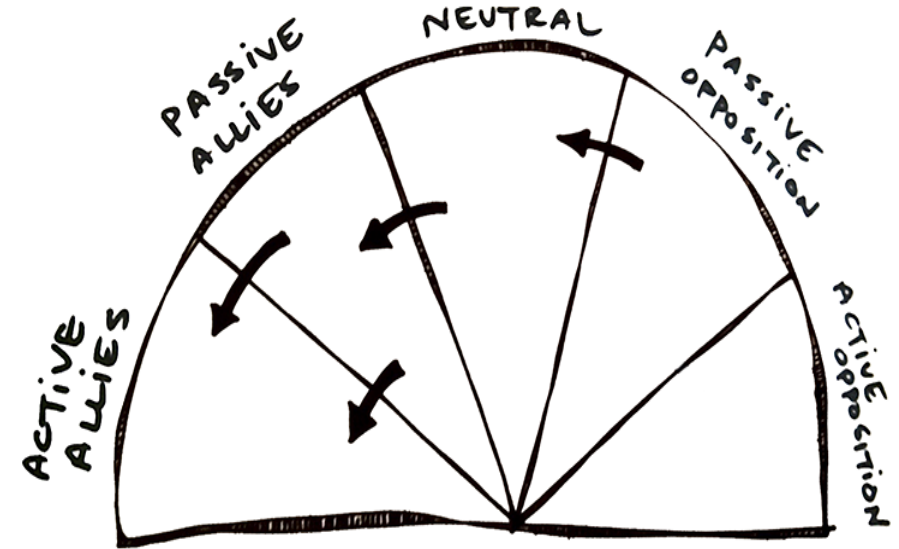
- › If campaigns put people at the center of solving the problems they are experiencing...
- › Then understanding the relationship people have with the win you seek is essential

Spectrum of Allies



Spectrum of Allies

1. Active allies: people who agree with you & are organizing alongside you
2. Passive allies: people who agree but aren't doing anything about it (yet!)
3. Neutrals: people who aren't sure, or are unengaged (they might just not know about you yet)
4. Passive opponents: people who disagree, but aren't trying to stop you
5. Active opponents: people who have done something to prevent you from reaching your goal

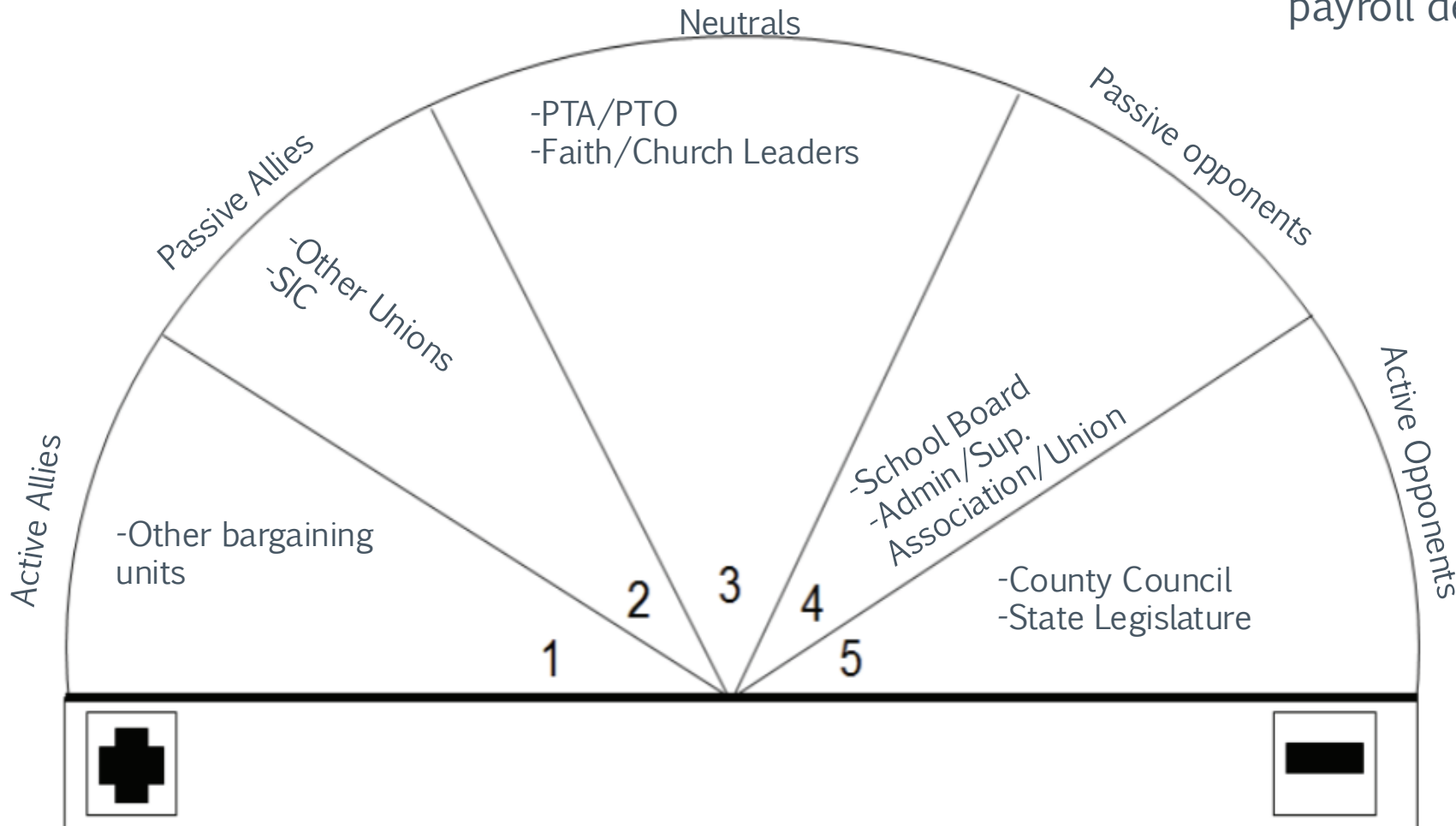


An example from history – Freedom Summer



Spectrum of Allies Example

- Issue: Removing payroll deduction for ESP members
- Target: State Legislature
- Demand: Stop bill that would remove payroll deduction for ESP members



Key Points



- › It is only necessary to move some or all of the pie wedges one step in your direction.
- › If we shift each wedge one step, we are likely to win, even if the hardliners on the opponent's side don't budge.

Messaging is Movement-Building

- › Messaging isn't about arguing—it's about inviting.
- › Focus determines who gets included and who is left out.
- › Equity-centered messaging helps build power with, not for.

The first photo portrays SNCC's John Lewis at the March on Washington in August 1963. The second photo portrays SNCC field secretary Charles Sherrod (on right, holding post) working on voter registration in Southwest Georgia. Photographs by Danny Lyon.



Messaging to Move People

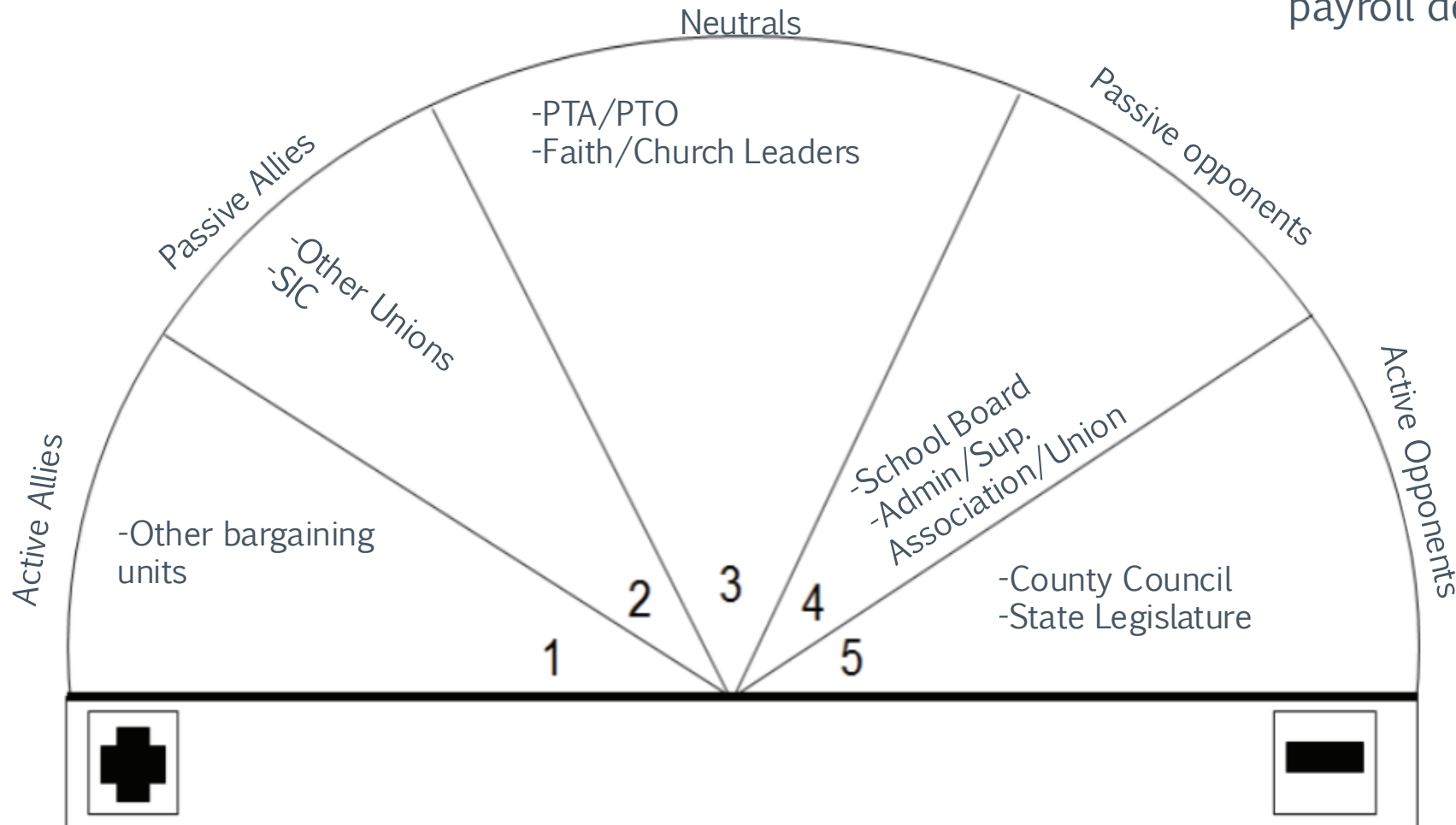
- › Good messaging doesn't try to *convince*, it tries to *connect*
- › Use messaging to **activate**, not just inform
- › The goal is to message centering equity
 - This means seeing and reaching people in their full humanity

Who Are You Talking To?

Spectrum	Needs Messaging That...
Active Allies	Deepens commitment
Passive Allies	Invites low-risk engagement
Neutrals	Frames values alignment
Passive Opponents	De-escalates with dignity
Active Opponents	Not the focus but you gotta say something and it needs to make sense

Spectrum of Allies Example

- Issue: Removing payroll deduction for ESP members
- Target: State Legislature
- Demand: Stop bill that would remove payroll deduction for ESP members



Coaching it Up

- › How will you know that there is something going on in the campaign related to an analysis of allies and how to message them?
- › What possible observations could you see?
- › What questions could you ask the team lead?
- › What are intentional interventions you might take?

Key Points



- › Equity means naming nuance - be specific, be inclusive
- › Don't center your opponent - build around your base
- › Good coaching = helping teams build power, not chase power

Strategy, Tactics and Escalation

Pg. 13-21 of Coaching the Plan

Pg. 51-68 in Participant Handout

Zac and Amanda



What do you think
is the difference
between a
strategy and a
tactic?

Strategy

Strategy: The way we use our power to win our demand. It is a series of tactics aimed at putting pressure on the target to meet our demand.

Tactics

Tactic: Actions we take as a part of an escalation plan that increases pressure on the target to win our demand.



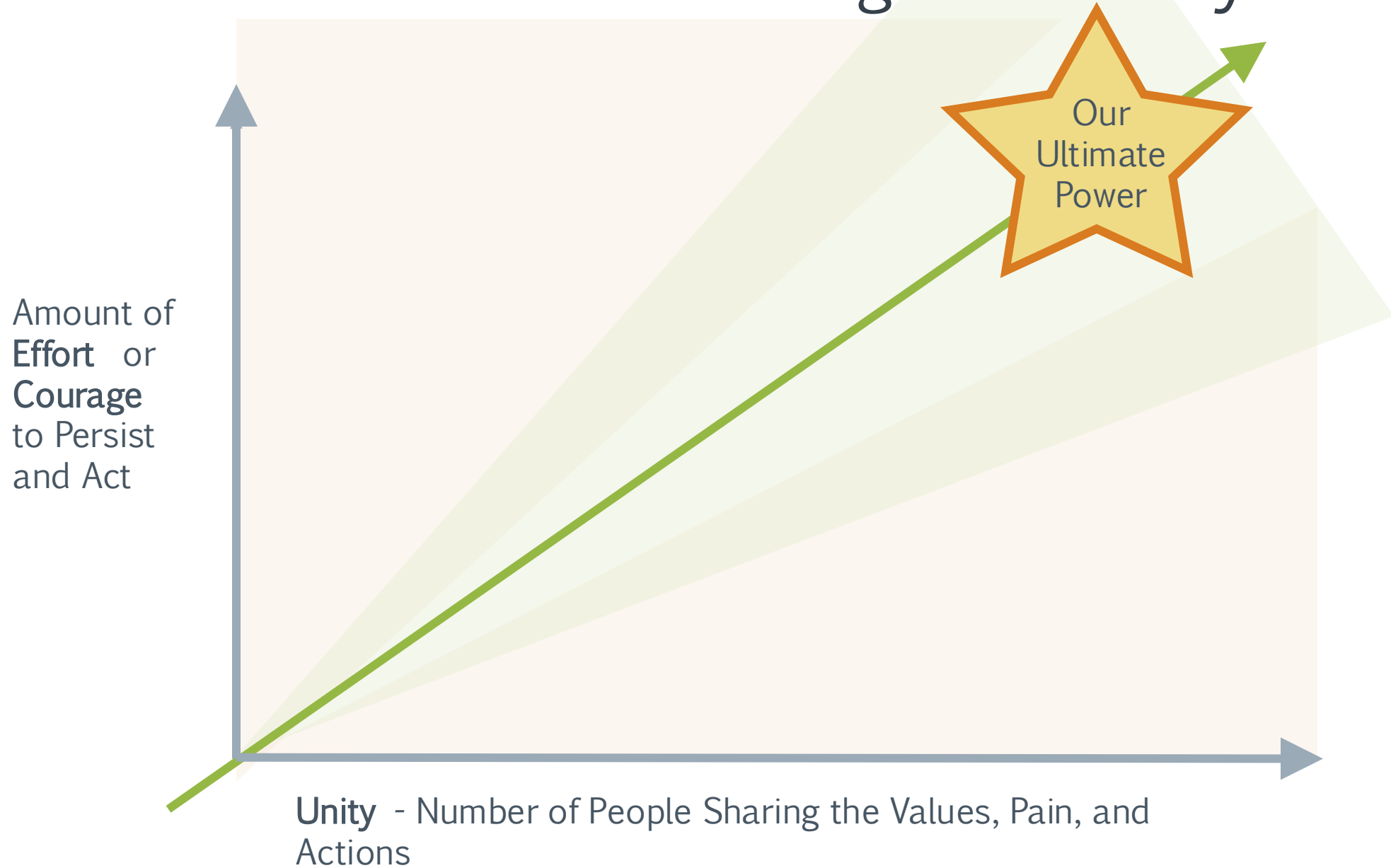
What makes
good tactics?

Tactics Must:

- Put pressure on your Target
(puts them out of their comfort zone)
- Build your Power
(develops leaders, brings more people in, etc.)



Power is a function of Courage and Unity



Low level of courage and high number of actors...

Amount of
Effort or
Courage
to Persist
and Act



Unity - Number of People Sharing the Values, Pain, and
Actions

High level of courage and low number of actors...



Tactics Must:

- Put pressure on your Target
(puts them out of their comfort zone)
- Build your Power
(develops leaders, brings more people in, etc.)

In other words be Strategic.



Coaching Up Strategy Tactics

- › (5 minutes) List as many tactics as you can on chart paper. List them vertically.
- › (10 minutes) Write the coaching questions you would use to improve the tactics on post-it notes. Put them next to tactics.

Key Points

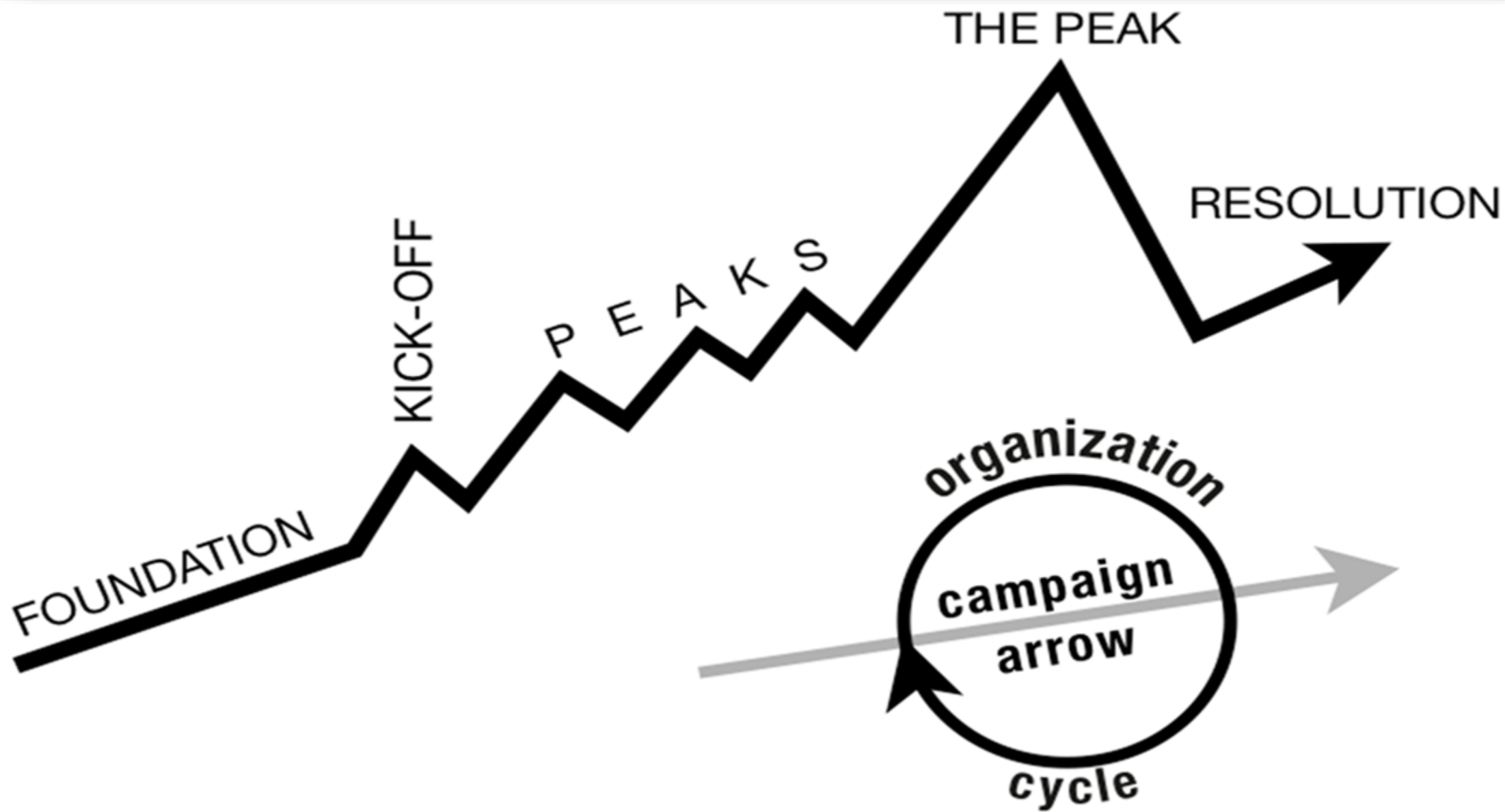


- Tactics allow workers to:
- › Share Resources, Values, and Commitment
 - › Take risks together and achieve shared wins
 - › Build trust in their own agency and the collective effectiveness of their union

Coaching in for Compression Points & Escalation

Pg. 13-21 of Coaching the Plan
Pg. 51-68 in Participant Handout

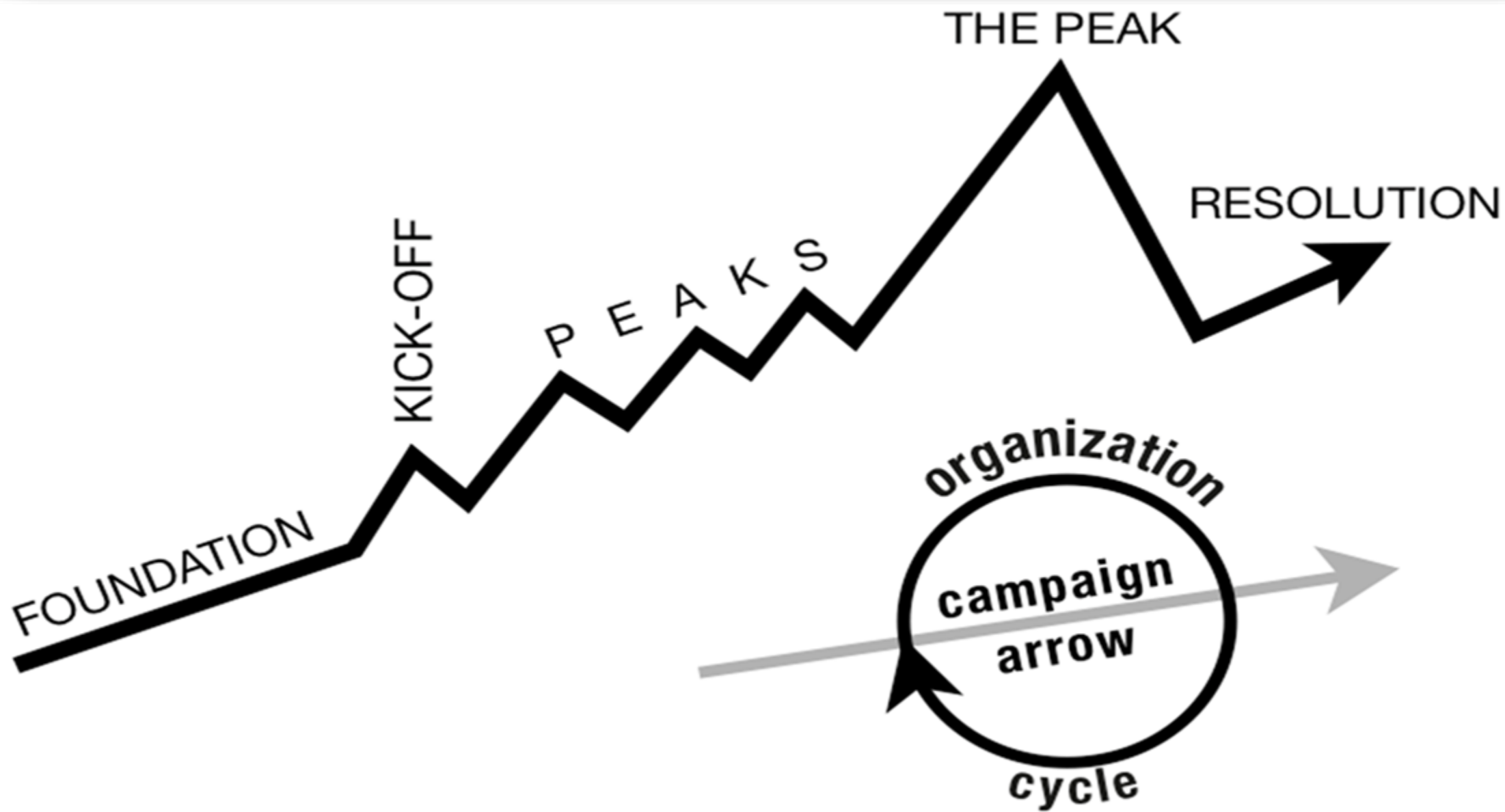
Zac and Amanda



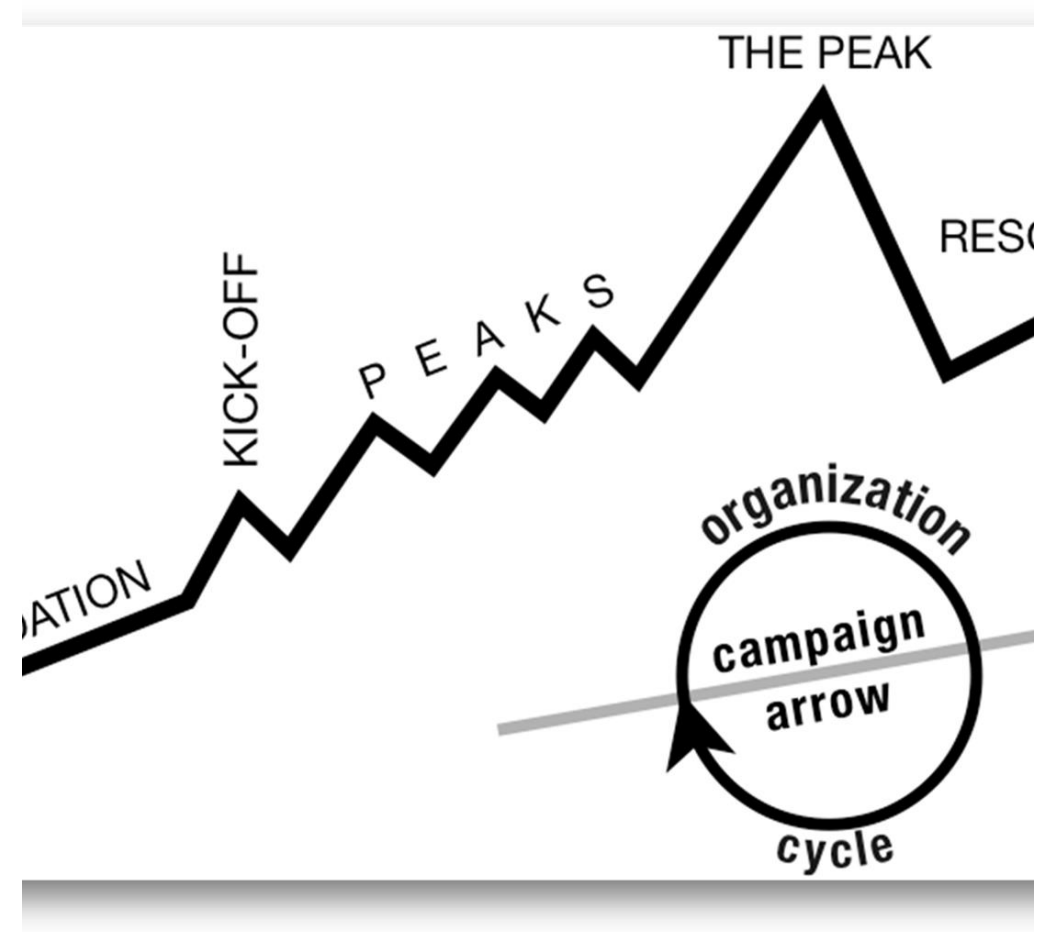
Compression Points

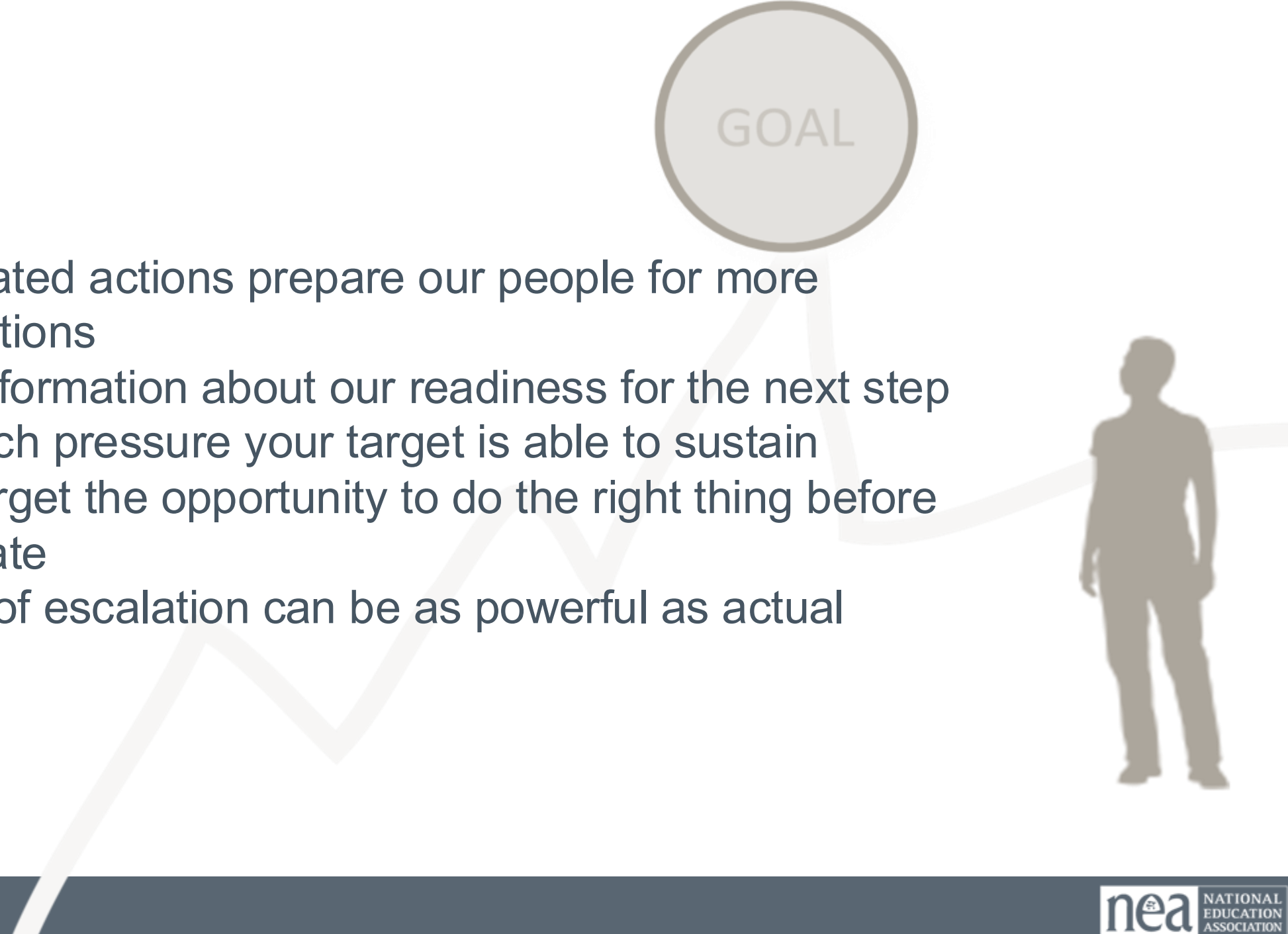
Points on the calendar where you celebrate short term wins or escalate your tactics.

- Naturally occurring deadlines- *Breaks, Board Meetings*
- Artificial deadlines- *target has till day X to act*
- Help us build urgency and crisis



Why do you think tactics escalate gradually?



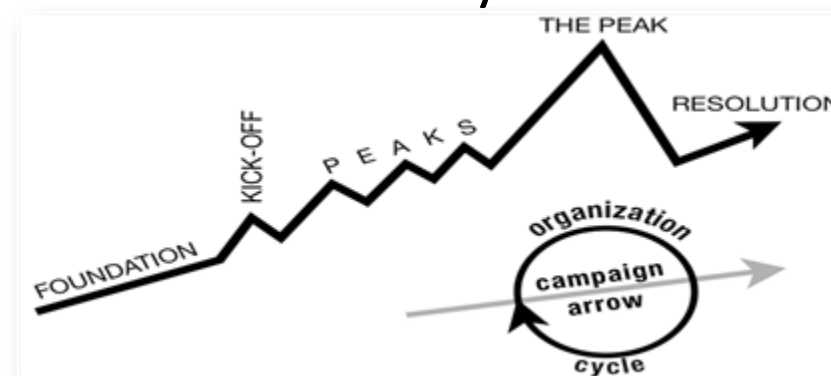


GOAL

- Less escalated actions prepare our people for more escalated actions
- Gives us information about our readiness for the next step and how much pressure your target is able to sustain
- Give the target the opportunity to do the right thing before things escalate
- The threat of escalation can be as powerful as actual escalation

Coaching Up Timeline, Escalation, and Compression Points

- › What did the organizers do in that long slow part at the beginning to get people ready to escalate? What are some low-risk, low-pressure tactics that actually work to build your base?
- › What did organizers do to escalate at the compression points? What tactics did they use?
- › Where the escalations in tactics successful? Why or why not?
- › If you were the coach for this campaign, what's an intervention you would consider to improve the outcome?



Key Points



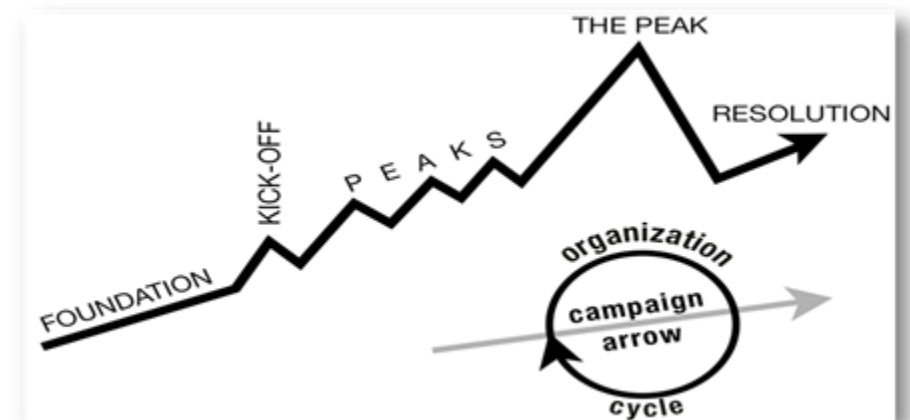
An escalating campaign is held together by a set of values and shared commitment to a demand.

Escalating tactics are how we develop leaders, identify new leaders, move more people into our base.

If we are organizing, we are always climbing campaign mountain

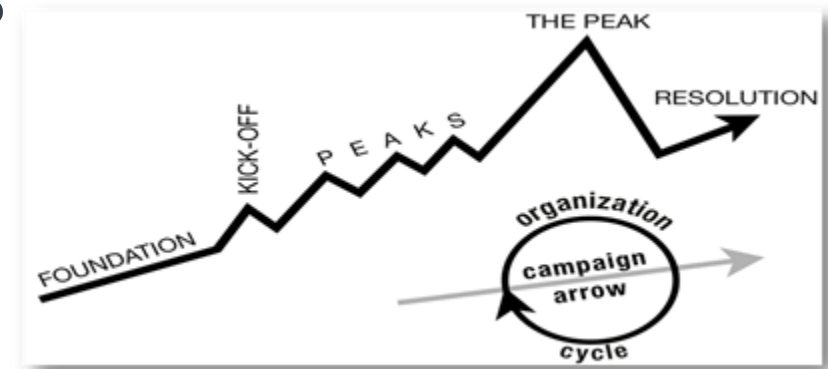
When to Escalate

›What do you have to consider when deciding when to escalate?



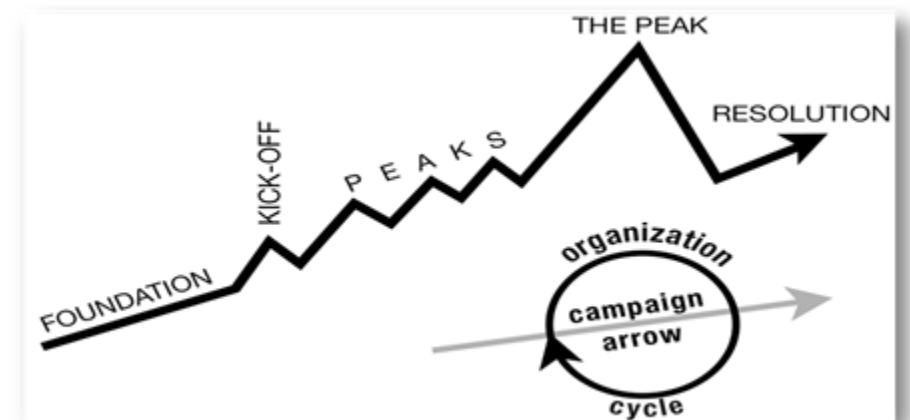
Considerations for Escalations

- › Calendar of the school year
- › Calendar for process of decisions
- › Timeline of internal preparation
 - How many leaders will they identify where by when?
 - How and when will they prepare those leaders?
 - When and how will they test leaders' abilities to get their followers to take action?
- › Goals for participation and how they will measure them.



Tracking participation

- ›How do you do it?
- ›Organizer math



DUNBAR'S NUMBER : 150

TYPICAL NUMBER OF PEOPLE WE CAN KEEP TRACK OF AND
CONSIDER PART OF OUR ONGOING SOCIAL NETWORK

150
TRIBE

50
CLAN

15
SUPER
FAMILY

5
CLOSE
FRIENDS

← WEAKER TIES → MORE INVESTMENT IN RELATIONSHIP →

DANG! NOW,
WHAT WAS THEIR
NAME AGAIN?



Dunbar's Number

Stable - Relationship

Connections

“Driver”
Leaders

Natural
Leaders

Developing
Leaders

Engaged
Members

Aware
Members

Disengaged
Members -
Supporters

5 🐵

15 🐵

50 🐵

150 🐵

500 🐵

1500 🐵

Problems of Practice

- › The leaders who thinks they can do it alone
- › Escalation backfires
 - Nobody shows up
 - Not enough pressure on a target to get a win

Key Points



- › Knowing when and how to escalate requires planning, setting goals, and measuring progress.
- › Bringing in new leaders is how you build participation in a campaign.

What is
becoming
clearer?

What remains
murky?

Housekeeping

Closing the Day

