



Campaign Academy: Planning Winning Campaigns for ESP Teams



Participant Handouts

The Campaign Lab is a system of Affiliate Staff, Members, and Leaders networked to build power to win on issues that matter most by building a culture for organizing. A culture for organizing and continually campaigning includes a shared analysis of how to win, issue identification, goal setting, strategic actions, distributed leadership, and data that informs progress. This NEA Center for Organizing training is designed to build skills around coaching all aspects of a campaign cycle.

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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-knowledge 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.

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. This does not mean re-explaining or reinterpreting another's words for others in the room. 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 direct and precise about your needs and thoughts is also kindness.

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 your preconceived notions and listening to everything someone has to say before jumping to conclusions. It requires some vulnerability, but not to the point of jeopardizing your personal safety. 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, class, gender, 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.

Seeking Discomfort

Leaning in to 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 in to 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?

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. 📖

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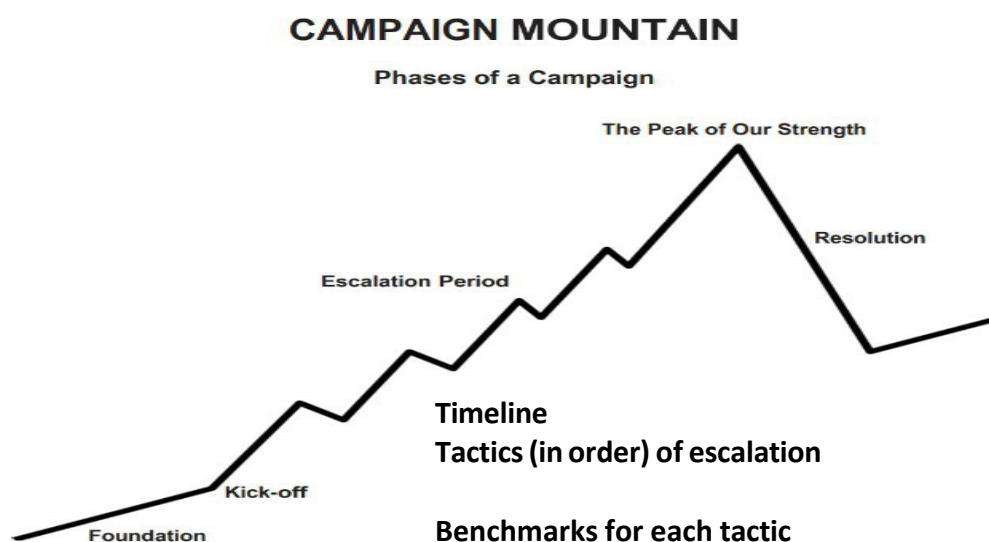
Planning Winning Campaigns for ESP



Overview
Centering Equity
Team
Problem and Issue
Power Analysis
Strategy

Campaign Planning Document Overview

Core Planning Team (The leaders who are making strategic decisions)	
Centering Equity (process to ensure this throughout your campaign?)	
Problem (big issue, no clear solution)	
Issue (personal, manageable, specific to the problem needing to be solved with a tangible solution)	
Demand (what do we want in order to solve the issue)	
Target (has the decision making or resources to solve your problem)	
Allies (supporters on this issue)	
Opposition (do not support you on this issue)	
Metrics (inform if you are winning along the way)	



Data (what will you collect and how) Campaign Team and Roles (consider distributing responsibilities) Res

CENTERING EQUITY (Iterative Analysis)

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?	

Core Team Role Workspace

ROLE	RESPONSIBILITIES	YOU WOULD BE GOOD FOR THIS ROLE IF YOU...	INTERESTED TEAM MEMBERS & RELATED SKILLS/TALENTS

Team Name & Chant (5 min.)

Team Roster:

NAME

PHONE

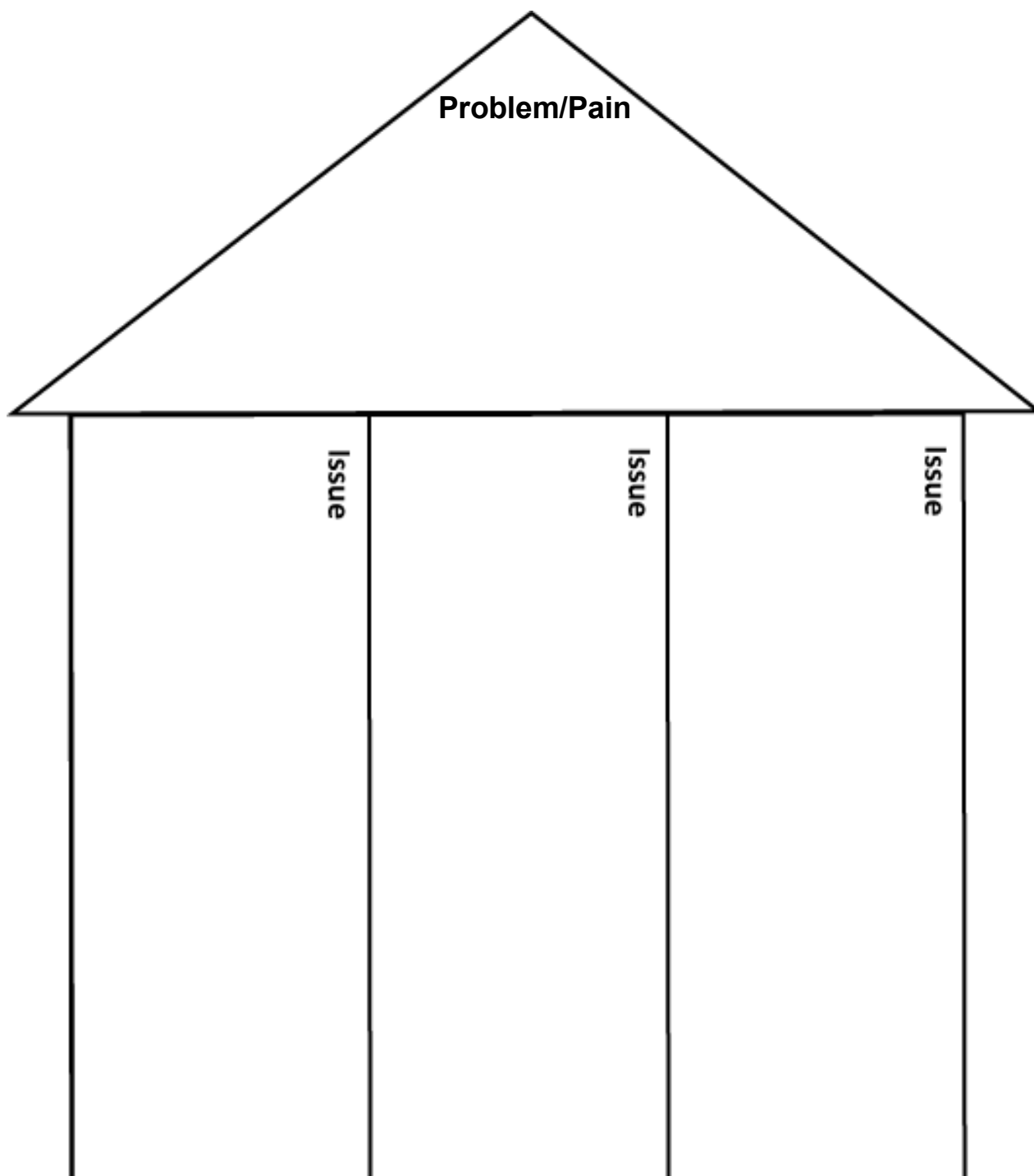
EMAIL ADDRESS

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 AND ISSUE

What is the problem(s) we are trying to address?

What is a concrete solution(s) to one part of this problem? This is where we find our issue.

Is the issue.. (See Issue Analysis Tools)

Widely felt and/or deeply felt?

- Winnable?
- Aligned with our values?

Does the issue..

- Build the union and builds leaders?

DEMAND

What is the demand to the target(s)? The demand should name a clear target, call on the target to take a specific action, and demonstrate the harm or impact. There may be a primary target and a secondary target.

TARGET

Target Name:

- Based on the Primary 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.

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?

SPECTRUM OF ALLIES POWER ANALYSIS (WHO CAN WE MOVE?)

1. Active Allies: Your Constituency

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: Support

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: Not Yet – With you or Against you

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.).

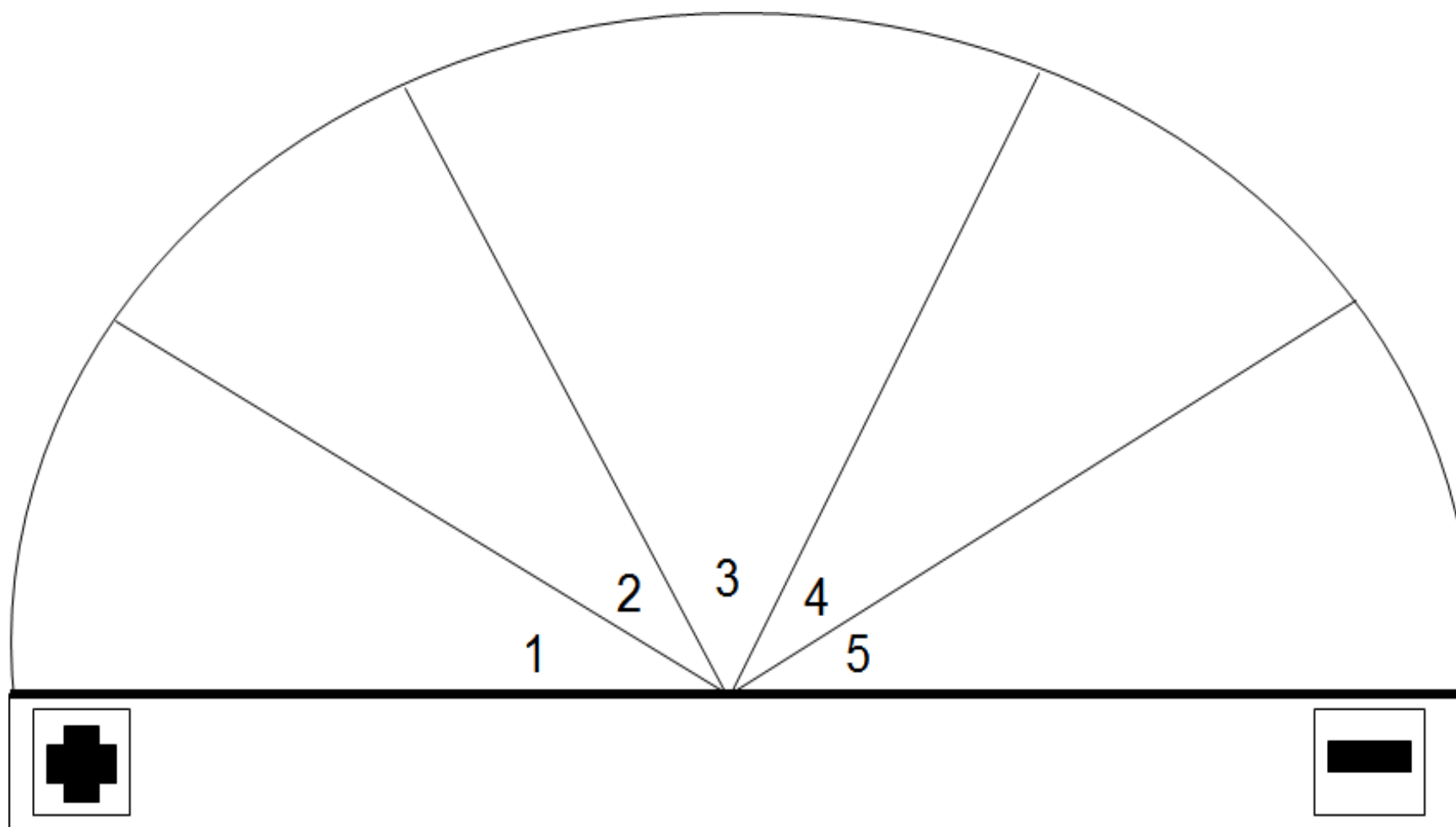
If your target is located in this area of the spectrum – your tactic goal would need to put them into a great dilemma, that any action they would take against you would be very “costly” to them. Your tactic goal would be to move them into a “*passive opponent*” position.

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

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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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PEOPLE COMMUNICATION PLAN – Based on the spectrum of allies analysis, how do you strategically communicate with the people in each of these groups?

Constituency- Your people who care about this issue and may take action to work towards the win		
What is your plan for being in contact with as many of these folks as often as possible? How will you know they care about this issue?		
Support- Individuals and organizations who support the win but may not be a part of the actions	Neutral - Individuals and organizations who are not yet working towards similar wins or against you.	Passive Opposition and Opposition - Individuals and organizations who are against the win you are seeking to achieve
What is your plan for being in contact with these folks? How will you know they support this issue?	What is your plan for being in contact with these folks? How will you know if and when they move towards you or away from you?	What is your plan for being in contact with these folks? How will you know that they oppose this issue?
Individuals and Organizations you identified that you may not know yet if they support, oppose, or compete with you.		
What is your plan for being in contact with these folks?		

MESSAGING

Focusing only on the opposition leads to becoming disheartened or cynical, which means you ignore potential allies and support. Focusing only on how to convince the important power-holder who is against you leads to ignoring all of the potential support you could build that could overpower her opposition.

Focusing only on active allies leads to being an isolated interest-group, which also means you ignore potential allies and support. Always doing events with the same group of individuals or organizations isolates you from creative, powerful community-building that can arise from new alliances and partnerships.

Generalizing about whole groups of people risks misunderstanding the nuances of communities. If you think about "students" as an entire group, you ignore the huge number of different groups & organizations (potential allies!) that exist in a student community.

DO focus on passive allies. These are folks who know or care about what you're up to, but aren't doing anything about it! Give them a chance to participate and build power with you. Good news, In most social change campaigns, it is not necessary to win the **opponent** to your point of view, even if the powerholders are the opponent. 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.

Who is the audience for the campaign messaging? What kind of message will reach them? What are their values? Think about 5 sectors you communicate with – Allies, Passive Allies, Neutral, Passive Opponents, Opponents.

Allies

Passive Allies

Neutral

Passive Opponents

Opponents

STRATEGIC 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)

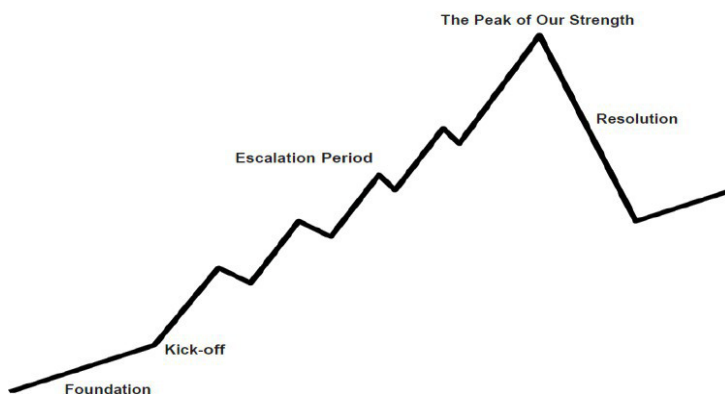
Number the tactics above in order of escalation:

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).

BUILDING POWER & DEVELOPING LEADERS

In what ways will we activate more members and build power throughout this campaign?

In what ways will we develop leaders throughout this campaign?

BUILDING POWER & DEVELOPING LEADERS – Do the Math

What is your goal? How many people on what date will it take to win that?

Example:

Goal is 5000 paper petitions signed 4 months from now.

Universe of Potential Actors: 60 Worksites each with 100 Workers

Team Planning: 10 Campaign Team Lead Members create plan (30 Days) (10 People)

Foundation: Each Campaign Team Lead Works with 5 Sites to recruit and train a Campaign Action Lead. (1 Team Lead to 5 Worksite Leads - 50 People)

Structure Building: Those 50 Campaign Action Leads recruit 5 People and train them. (50 Worksite Leads to 5 Building Team Members - 250 People)

Second Peak: Expansion Communication and Kick-off (30 Days)

Each Building team holds one 10 Minute Meeting recruiting 25 people in attendance.

(each Campaign Action Team Member is responsible for recruiting 5 people to the meeting) (250 Building Team Members to 5 Supporters - 1250 People)

Third Peak: Resolution - Asking for Signatures (30 Days)

Each of the 25 who attended each of the 50 building meetings are responsible for collecting at least 5 petition signatures. (1250 Supporters to 5 Supporters - 6250 Signatures and People)

What is your math?

OUTLINE OF STRATEGIC PLAN

- What foundation do you need to build before implementing your campaign (leadership team, initial planning, recruit leaders, gather resources, etc.)? How many people? Date?
- What will you do to kick-off your campaign and gear up for the first tactic? How many people? Date?
- What tactics will you take to reach the win? How many people engaged for each, the date, and the Goal?

Foundation		
Kick-off		
Tactic 1		
Tactic 2		
Tactic 3		
Tactic 4		
Tactic 5		
Win/Demand/Goal		