

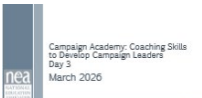
Facilitator Agenda – Coaching Campaign Leaders Day 3

Key Outcomes for the Day:

Participants will be able to:

- Understand the role of a growth mindset in coaching.
- Understand the need to coach towards uncovering awareness and reflection on systems, beliefs and root causes.
- Identify and utilize principles of awareness-based systems change to drive meaningful change as a coach.

General Materials Needed:		Room Set-up: 150 people max	
Name Tents with the Norms Room signs, Stick on Name Tags Chart Paper (10 full w Sticky Strip)	Materials Box for each table with: Markers (Mr. Sketch variety) Post its – 3x3” and 4X5” sizes	Long Rectangle table at back for facilitators Round Tables for participants Projector, Screen, mics, and Speakers Carousel stations and reporting stations	
Overview of Day, Time, and Facilitator Assignment			
Facilitators: Carrie, Fabricio, TBD			
7:30-8:30 - Breakfast			
8:30 – 8:50 – Welcome, Feedback, and Changing Relationships	Carrie		
8:50 – 10:20 – Awareness-Based Systems Change	Fabricio		
10:20 – 10:35 - Break			
10:35 – 11: 45 – Back Home Planning: Review assessment, coaching agenda, coaching campaign, system beliefs	Kristin & Katie		
11:45 – 12:20 - Presentations	Bekah & Melissa		
12:20-12:40 - Closing	Carrie		

Time Slides Facilitator	Resources	Instructions, Activity and Debrief (Facilitator Script)	Essential Questions and Outcomes
	Charts, handouts, articles, materials, slide	What are you saying, what are they doing, what questions will you use to guide learning and make clear the important points Include an estimate for how long each section of the learning will take	What question(s) will this learning answer? What will participants know or be able to do?
7:00 -8:30 – Team prep, practice, room set up, sound check, etc.			
Entry Activity			
8:30 – 8:50	Carrie	Welcome, Feedback, and Changing Relationships – 20 min.	
     	Norms in Handouts Agenda on Slides Parking Lot Chart Name Tents Handout Package	Facilitator script, processes, timings, debrief questions, and any notes the facilitator needs to implement the section. How we can move towards a coaching practice in our union? Opening Shared Agreements: Feedback on Feedback What's lingering from yesterday, Agenda for the day How do we transform our relationships within our union? We heard the universal concern with transforming our relationships from where they currently are (service, colleague, staff, etc.) to one of coaching. Turn at your table- how can we begin to transform your relationships to one of coaching? What is a stem or good question you could ask that could start to transform that relationship?	Participants will know how we are going to work, the basic schedule, and the logistics relevant to the training.

Developing Systems Awareness Consider the different people affected by the scenario. Write your responses down the left side of the iceberg. STEP 1: Identify the actions with both sides and how different... scenarios. 1. Write in the left column the action or behavior that is supporting behavior + scenario? 2. In the right column, write what each group of people believes about the action and their relationship to it. STEP 2: Force for and against change. 3. What patterns are you seeing that keep the problem in place? Do patterns of power, habits, people dynamics, union or member behaviors. 4. What incentives are there to keep the problem in place? What incentives are there to change it? Answer these questions: STEP 3: What needs to change? 5. Awareness: What awareness do the leaders need to continue to address this problem? 6. Organizing: What can the leaders do in relation to each constituent group to achieve their goal of more powerful union? 7. Members: What beliefs and mindsets in the union will support this change? 8. Practices: What practices and behaviors do you think will support change? Building Systems Awareness Debrief What did you learn? What are the patterns you can disrupt? How can you use this when you go home?		You all are union member leaders in an imaginary local union. • Select one scenario you want to work on. • Select one person to write the responses on the butcher paper. • Select one person to read the scenario, out loud, to the group. • Draw an iceberg on the paper and a water line. Be sure to leave a lot of room on the paper to write the responses to the following questions. 3 Scenarios □ A divided union in a large urban district □ Rebuilding the union and winning raises in a suburban district □ Building community defense with immigrant families Scenario 1: A divided union in a large urban district • Your local union has newly elected leaders who want to organize their union to have enough power to win a good contract. • The current contract secured modest improvements, but was broadly viewed as disappointing. It was ratified by a small group of members after hours of bitter debate. The “Vote No” camp continued to spread the opposition for a year after ratification. The opposing camp is small, but loud. They try to disrupt the monthly Rep Assemblies with countless angry objections and bitter comments from the floor. This has created a defensive union leadership team, and the long rep assembly meetings alienate new members who come to check out the union meetings. Right now, many members believe the union doesn’t do anything. They think of the union as a third party. Many members aren’t aware of the role members can play, or how they can be involved in their union. Many members can’t imagine what is possible or how the union could campaign for better pay. • Answer these questions about the different groups/people you can identify that are affected by the scenario. Write your responses down the left side of the iceberg:	
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STEP 1: Seeing the problem with fresh eyes and from different perspectives.

1. How is the way the union is structured impact what's happening (behaviors + events)?
2. In a sentence, state what each constituent group believes about the union and their relationship to it.

STEP 2: Force for and against change

3. What patterns are you seeing that keep the problem in place? By patterns we mean habits, people dynamics, union or member behaviors.
4. What incentives are there to keep the problem in place? What incentives are there to disrupt it?

ON THE RIGHT SIDE OF THE ICEBERG CAPTURE THE FOLLOWING RESPONSES.

STEP 3: What needs to change?

- 5. Awareness:** What **awareness** do the leaders need to cultivate to address this problem?
- 6. Organizing:** What **can the leaders do** in relation to each constituent group to achieve their goal of more powerful union?

7. Mindset: What **beliefs and mindsets** in the union will support this change?

8. Practices: What **practices and behaviors** do you think will support change?

Scenario 2: Rebuilding the union and winning raises in a suburban district

- Newly elected leaders in a district, in a small city, want to organize their union to have enough power to win significant raises. The state just passed a budget that gives hundreds of millions more to public schools, including the district the leaders are in. The leaders and many union members know they will need to push to get those raises.
- However, the union currently has only 30% dues paying members. Many of those members believe the union needs to win salary increases. They aren't aware of the role members can play, or how they can be involved in their union. They think of the union as a third party- someone else doing the work. These members can't imagine what is possible or how the union could campaign for better pay.
- Even more of the district's educators who aren't members don't think the union does anything. And many do not know if a union exists in their district.
- Answer these questions about the different **people/groups** you can identify that are affected by the scenario. Write your responses down the left side of the iceberg:

STEP 1 Seeing the problem with fresh eyes and from different perspectives.

1. How is the way the union is structured impact what's happening (behaviors + events)?

2. In a sentence, state what each constituent group believes about the union and their relationship to it.

STEP 2: Force for and against change

3. What patterns are you seeing that keep the problem in place? By patterns we mean habits, people dynamics, union or member behaviors.

4. What incentives are there to keep the problem in place? What incentives are there to disrupt it?

ON THE RIGHT SIDE OF THE ICEBERG CAPTURE THE FOLLOWING RESPONSES.

STEP 3: What needs to change?

5. Awareness: What **awareness** do the leaders need to cultivate to address this problem?

6. Organizing: What **can the leaders do** in relation to each group to achieve their goal of more powerful union?

7. Mindset: What **beliefs and mindsets** in the union will support this change?

8. Practices: What **practices and behaviors** do you think will support change?

Scenario 3: Building community defense with immigrant families

- I.C.E. is present in the community. Some students are scared to go to school and parents are afraid to leave their houses. The bus department is down several buses because mechanics, many of which are from Latin America, are calling out a lot due to fear. This is causing system-wide late arrivals and late drop-offs. Angry parents were vocal at the last School Board meeting complaining about the bus situation.
- A few immigrant parents have asked individual educators for help. Those educators having been helping as best they can. The union has not gotten formally involved. The union just settled their negotiations and members were active. A group of member leaders want to organize stronger support for the community – but they are trying to figure out where to start. Some union members are suspicious of immigrants and have been heard to say things like, “I’m not against immigration if it is done the right way.”
- Answer these questions about the different **groups/people** you can identify that are affected by the scenario. Write your responses down the left side of the iceberg:

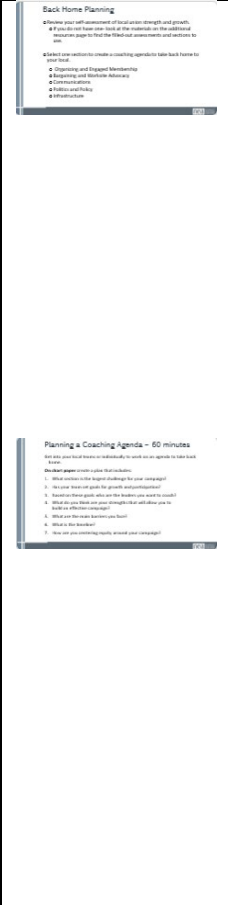
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10:20-10:35		BREAK	
10:35-11:45	Kristin & Katie	Back Home Planning: Review assessment, coaching agenda, coaching campaign, system beliefs – 70 min.	

 Back Home Planning Review your self-assessment of local union strength and growth. If you did not have one, look at the rubric on the additional assessment page to find the field-out assessments and sections to add. Select one section to create a coaching agenda to take back home to your team: - Organizing and Engaged Membership - Bargaining and Worksite Advocacy - Communications - Politics and Policy - Infrastructure Planning a Coaching Agenda - 60 minutes Get into your local teams or individually to work on an agenda to take back home. On a chart paper create a plan that includes: - What section is the largest challenge for your campaign? - Has your team set goals for growth and participation? - Based on these goals who are the leaders you want to coach? - What do you think are your strengths that will allow you to build an effective campaign? - What are the main barriers you face? - What is the timeline? - How are you centering equity around your campaign?		Review Assessments – 5 min. Review your self-assessment of local union strength and growth. Select one section to create a coaching agenda to take back home to your local. Work with your back home group. If you are a group of 1- you join another plan or make your own plan. By One Selection we mean Organizing and Engaged Membership Bargaining and Worksite Advocacy Communications Politics and Policy Infrastructure Planning a coaching agenda – 60 min. Get into your local teams or individually to work on an agenda to take back home. On a chart paper create a plan that includes: - What section is the largest challenge for your campaign? - Has your team set goals for growth and participation? - Based on these goals who are the leaders you want to coach? - What do you think are your strengths that will allow you to build an effective campaign? - What are the main barriers you face? - What is the timeline? - How are you centering equity around your campaign?	
11:45 – 12:20	Bekah & Melissa	Presentations – 35 min.	

 YOU DID A GOOD JOB Presentations Team Presentations - Take your chart and find another group. 20 minutes total 5 minutes to present to one group 5 minutes to get coaching feedback - Swap for a total of 20 minutes of time Gallery Walk - 10 minutes - Put your chart on the wall and complete a gallery walk to see other plans. - Leave feedback/endorsements on post-it notes for each chart.		Team Presentations of Coaching Agenda - Take your chart and find another group. 20 minutes total 5 minutes to present to one group. 5 minutes to get coaching feedback (swap for a total of 20 minutes of time). - End- put up your chart and gallery walk to see other plans. (10 minutes) - Leave feedback on post its.	
12:20 – 12:40	Carrie	Closing	
 What is your commitment? What can you learn today to take a step toward your commitment? What can you do this month? Give us Your Feedback Please Campaign Lab What is Campaign Lab? - Intergroup Dialogue - Engage the Community - Connect and Collaborate - Learn and Grow - Empower and Inspire - Transform the World Do you want to build the power of your team? Apply to the Campaign Lab Experienced in leading Campaigns? Apply to be a Coach		We want to acknowledge the work you have done these past few days. Let's go around the room and share some an acknowledgement for us as a group or another person. For example, <i>I want to acknowledge the heartfelt work we have done together and how hopeful I feel for the impact we will have as coaches.</i> Evaluation - 10min	

NOTES

Slide

SCRAP

- For example, some activists from this same local attend an organizing training and come back to their local and start to identify respected leaders to join an organizing team. Members start to get involved in the union. The intervention of organizing easily disrupted that widely held belief about apathetic members.

ICE scenario guide

Union does not have an internal organizing structure to support a response, and it hasn't partnered with the community deeply before. The decision making for the local is centralized with the elected leadership – and they are working full-time and overwhelmed with union business.

There is a belief among some in the union that the role of the union is for bargaining and individual grievances. A core of committed union leaders doesn't believe it can count on the membership to get involved widely.

The leaders aren't aware that some local unions in the country are leading on community defense work through strong community-educator alliances and a well-organized, activated membership. [Is this the correct answer to this question?]

Systems Awareness can help us:

- *Improve decision making by deepening a shared awareness of the system.*
- *Shift from an individual perspective to a bigger vision*
- *Identify opportunities to support change that start with ways of thinking and sources of inspiration and then having that shift shape behaviors, processes & structures.*

- *Help someone understand how they are a part of the system.*

- Let's continue to explore our local union and school community as a system. We are facing rapidly changing conditions and forces that are testing the strength of our union. ASK ROOM FOR EXAMPLES I'm thinking of the attacks by ICE, school privatization, and intensifying global conflict, for example.
- We are seeing how our approach might need to evolve and how organizing and campaigns are path forward to not just incremental change but also towards long-term shifts in power.
- We have an opportunity, through deeper awareness of the systems we are in, to identify what changes are needed to adapt to the moment – and create the possibility for more transformative change.
- We are becoming aware of how our union and school communities are changing in some places to meet this moment. For example, I know many of you are organizing in alignment with your community. What are some examples of shifts in patterns, values, beliefs or structures that you are seeing in your local union or in the country to meet this moment?
- This is amazing organizing. We have to figure out how to fully harness the power of our members in order to transform our union, schools and country.
- Let's take a moment to consider some examples you are seeing where your leaders, members, union, or school administration have not yet made the leap and made changes to meet the moment?

This framework gets to the root causes underlying how things are as they are to gain awareness on the path to change.

Explore questions of noticing patterns:

- Where do you see people de-sensing or not seeing the pain of others?

- Where do you see them losing touch with others?

Play and spontaneous creation can help the process of sensing the system.

The opportunity with systems thinking is that it can unlock the prophetic imagination to find more transformative solutions to the challenges we face.

Applying Systems Thinking to School and Unions Change: Tools for Campaign Coaches

This lesson focuses on understanding the knowing-doing gap in education and how it affects schools and unions. You will also learn about common obstacles to taking action and discover strategies that coaches can use to help bridge this gap.

1

Organizational Culture

Many schools and unions have deeply rooted traditions and norms. Resistance to change, fear of failure, or a "we've always done it this way" mindset can make it hard to move from knowing to doing.

When the culture doesn't support experimentation or learning from mistakes, even the best ideas can stall before they start.

Lack of Collective Agency

Sometimes, individuals feel powerless to make a difference, especially in large or hierarchical organizations. When people don't believe their actions matter, motivation to act fades.

This lack of agency can keep teams stuck in old patterns, even when everyone knows change is needed.

Disconnect Between Leadership and Staff

Top-down mandates or initiatives often fail when they aren't embraced by those expected to implement them. If staff feel excluded from decision-making, they may not buy in or take action.

Bridging the gap requires genuine collaboration and shared ownership of change efforts.

Overwhelm and Burnout

Educators and union staff often juggle multiple initiatives and demands. When there's too much on their plates and not enough support, it's easy for new ideas to get lost in the shuffle.

Burnout and overwhelm can sap the energy needed to turn knowledge into action.

Key Takeaways and Looking Ahead

Recognizing and bridging the knowing-doing gap is essential for meaningful change in schools and unions. As a coach, your role is to help teams move from intention to action by fostering reflection, agency, and collaboration. In the next lesson, we'll introduce the Iceberg Model—a powerful tool for diagnosing the deeper patterns that shape our systems and guide lasting transformation.

The Four Levels of the Iceberg Model

Understanding these levels is key to using the model effectively. Review each flashcard to build your foundation.

Click to flip

Visible symptoms—what is happening right now in your school or union.

Click to flip

Trends over time—recurring issues or trends that show the problem isn't isolated.

Click to flip

Underlying processes, policies, and setups that produce these patterns.

Click to flip

Deeply held beliefs, assumptions, and levels of awareness that create the structures.

A persistent challenge in many schools is low student engagement. Often, the focus is on the "Events" level of the iceberg—such as addressing individual incidents of disengagement or implementing new activities to spark interest. However, this approach may overlook deeper levels, such as the "Patterns/Trends" (recurring disengagement across classes or years), "Systemic Structures" (school policies, curriculum design, or resource allocation that may contribute to disengagement), and "Mental Models" (underlying beliefs about student motivation or the value of education). By primarily addressing surface-level events, we might miss the opportunity to create lasting change by examining and transforming the deeper systemic and cultural factors that influence student engagement.

Picture a team gathered around a whiteboard, mapping out an iceberg diagram together. By visually breaking down a challenge into events, patterns, structures, and mental models, teams can collaborate to uncover root causes and design more effective solutions. This shared process builds collective understanding and commitment to meaningful change.

Reflecting on Our Role in the System

Consider how your own actions, beliefs, and assumptions contribute to the challenges you face. Expand each tab to explore this reflective dimension.

OBSERVER AND OBSERVED
CHALLENGING ASSUMPTIONS
CREATING OPTIMAL CONDITIONS
FROM REFLECTION TO ACTION

Recognize that you are part of the system you're analyzing, not just an outsider looking in. Your perspective shapes what you see and how you respond.

By acknowledging your role, you open up new possibilities for change and learning.

Key Takeaways and Looking Ahead

The Iceberg Model helps you move beyond surface-level fixes to diagnose and address the root causes of persistent challenges. By applying this tool, you can create more meaningful and lasting change in your school or union. In the next lesson, you'll explore the Three Divides in systems change and how they impact your work as a coach.

Seeing the Hidden Gaps: The Three Divides in Schools and Unions

Many of the toughest challenges in schools and unions don't just come from policies or resources—they stem from deeper divides in our relationships with nature, with each other, and with ourselves. This lesson will help you recognize these "three divides" and explore how bridging them can lead to healthier, more connected educational communities.

This lesson focuses on understanding and addressing key divides that impact our world and educational environments. By exploring these divides, you will gain insights into how they manifest and how you can respond effectively as a coach.

1 Define the ecological, social, and spiritual divides.

2 Identify how these divides show up in educational settings.

3 Reflect on ways to address these divides as a coach.

Schools and unions frequently encounter complex problems that cannot be resolved simply by changing rules or increasing resources. Challenges such as disconnection, burnout, and inequity often indicate deeper underlying divides. By recognizing and understanding these divides, coaches and teams can tackle the root causes of ongoing issues and create environments where everyone has the opportunity to succeed.

What Are the Three Divides?

Expand each section to learn about the divides described in Theory U.

Ecological Divide

Social Divide

Spiritual Divide

Visualizing the Divides

Imagine a diagram with three separate circles, each representing ecological, social, and spiritual, with gaps between them. This image highlights how these divides create separation and fragmentation. As a coach, helping others to bridge these gaps creates the essential context for building healthy, resilient educational and union environments where people feel connected to each other, to their work, and to the world around them.

How Do the Divides Show Up in Schools and Unions?

Click through each tab to see examples of each divide in action.

Ecological Divide

Social Divide

Spiritual Divide

Schools or unions may have limited environmental education, wasteful resource use, or a lack of green spaces. These practices reflect a disconnect from nature and can impact student well-being and learning.

Addressing the ecological divide means integrating sustainability and environmental awareness into daily routines and curricula.

Reflecting on the divides present in your school or union can help you better understand the challenges and opportunities you face as a coach. Common divides may include differences in experience levels, varying philosophies, generational gaps, or disparities in access to resources.

Identifying which divide is most prominent in your context allows you to tailor your coaching strategies to bridge gaps, foster collaboration, and support professional growth. Consider how these divides influence communication, trust, and willingness to try new approaches, and think about ways you can address them to create a more cohesive and supportive environment for all educators.

Reflective Practice: Spotting the Divides

Now it's your turn to reflect. In this section, you'll consider where the ecological, social, or spiritual divides may be present in your own context and how they might be addressed.

Where Do You See the Divides?

Expand each prompt and jot down your thoughts.

Ecological Divide

Are there ways your school or union could better connect with or care for the environment? Consider practices, policies, or attitudes that might be improved.

Social Divide

Where do you notice gaps in inclusion, equity, or collaboration? Think about relationships, communication, and whose voices are heard or left out.

Spiritual Divide

How do you and your colleagues find meaning and purpose in your work? Where is this missing, and what could help restore it?

Key Takeaways and Looking Ahead

Recognizing the ecological, social, and spiritual divides is a crucial step toward building healthier, more connected schools and unions. As you reflect on your own context, consider how you can help bridge these divides. In the next lesson, you'll explore the Four Founding Principles of Awareness-Based Systems Change and how they can guide your work as a coach.

From Insight to Action: The Four Principles for Transformative Change

Lasting change in education and your union is about more than introducing new programs or policies—it's about shifting how we see, sense, and act within our systems. In this lesson, you'll explore four guiding principles that empower coaches to lead meaningful transformation, moving from insight to action in schools and unions.

By the end of this lesson, you will have achieved several important goals related to awareness-based systems change in educational and union settings. Review the following objectives to understand what you will be able to do:

- 1
Identify and explain the four founding principles of awareness-based systems change.
- 2
Connect each principle to practical coaching strategies in educational settings.
- 3

Reflect on how to apply these principles to foster transformation.

Many change efforts in schools and unions stall because they focus only on surface-level fixes—new initiatives, policies, or quick solutions. The four principles of awareness-based systems change offer a roadmap for deeper, more sustainable transformation. By shifting collective mindsets and raising awareness, these principles help teams address root causes and unlock lasting progress.

The Four Principles of Awareness-Based Systems Change

These principles, drawn from Otto Scharmer’s work, guide effective, lasting change. Review each flashcard to build your foundation.

Click to flip

You cannot understand a system unless you change it

Click to flip

You cannot change a system unless you transform consciousness

Click to flip

You cannot transform consciousness unless you make a system see and sense itself

Click to flip

You cannot transform systems unless you sense and actualize the emerging future

Picture a path unfolding through a forest, with a group moving from shadow into sunlight. This image represents the journey of transformation: leaving behind old patterns and stepping into new possibilities. Change is both an internal process—shifting mindsets and awareness—and an external one, as new actions and relationships take root.

Coaching with the Four Principles

Expand each section to see how the principles can guide your work as a coach.

Change Through Action

Facilitate small experiments or pilot projects to help teams learn by doing, not just by planning. Real understanding comes from engaging with the system and seeing what happens when you try something new.

Transforming Mindsets

Use reflective questions and dialogue to surface and shift limiting beliefs within your team. Encourage open conversations that challenge assumptions and invite new perspectives.

Creating Spaces for Reflection

Hold regular sessions where staff and students can pause, share experiences, and see the system from new perspectives. These reflective spaces help teams recognize patterns and opportunities for growth.

Prototyping the Future

Encourage teams to test new ideas in practice, learn from feedback, and adapt as they go. Prototyping helps bring emerging possibilities to life and builds confidence in trying new approaches.

Reflect on the coaching principles you have learned. Identify which one aligns most closely with the challenges you are currently facing in your coaching practice. Consider how you can implement this principle to address those challenges. For example, if the principle of active listening resonates with you, think about ways to enhance your listening skills during coaching sessions to better understand and support your coachees. Share your thoughts on how applying this principle could positively impact your coaching outcomes.

Strategies for Driving Change

Click through each tab to discover practical ways to implement the principles.

Facilitate System Sensing

Prototype and Iterate

Cultivate Shared Purpose

Hold Reflective Space

Use mapping exercises or listening sessions to help teams see the whole system and their role within it. This builds shared understanding and uncovers hidden dynamics.

System sensing encourages empathy and helps teams identify leverage points for change.

Guided Reflection

I am going to walk us through some reflection aimed to deepen our awareness.

Imagine a change you want to see in your school community. Find your inspiration. Sense what the future possibility can be.

Identify an old pattern. Identify how you are a part of this pattern or play into it. How do you think the pattern needs to shift?

What do you think is the mindset behind that pattern?

What are the beliefs and/or values in that pattern?

What is step you can take to move toward change?