

Campaign Academy: Coaching Skills to Develop Campaign Leaders Day 2

March 2026



Feedback on Feedback

- › High ratings for the facilitator team and collaborating with each other in group activities.
- › More time for debrief and feedback noted and adjustments made.
- › We are educators not just teachers in our union. Yes!
- › Pilot feedback on adapting coaching fundamentals.
- › Mixed reviews on puzzle activity
- › Coming up...
 - Today coaching campaigns and implementing.
 - Sunday implementing coaching in your context.

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

Today's Agenda: Coaching Campaign Leaders

Time	Content
8:30 – 9:00 A.M.	Welcome, Grounding, Feedback
9:00 – 10:00 A.M.	Heart Hand Head Diagnosis
10:00 – 10:15 A.M.	Break
10:15 – 10:50 A.M.	Practice
10:50 – 12:00 P.M.	Services to Organizing
12:00 – 1:00 P.M.	Lunch
1:00 – 1:10 P.M.	Grounding
1:10 – 1:55 P.M.	Using Assessments in Coaching
1:55 – 2:15 P.M.	Coaching a Campaign Leader
2:15 – 2:30 P.M.	Break
2:30 – 3:15 P.M.	Activity: Coaching a Campaign Leader
3:15 – 4:05 P.M.	Coaching Triads
4:05 – 4:30 P.M.	Debrief and Wrap Up
4:30 – 5:00 P.M.	Adult Choice Networking

Opening Activity

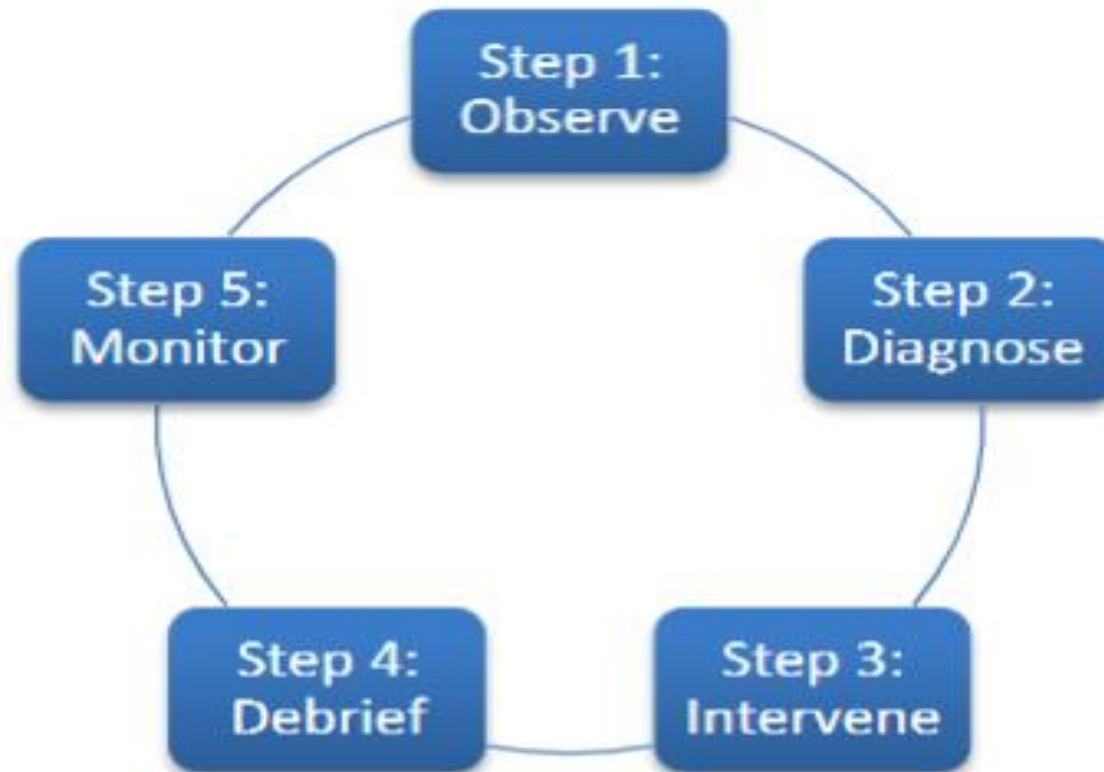
Carrie

Diagnosis: head, heart, hand

Katie



Cycle of Coaching



Coaching Approaches

- › Corrective
 - Aimed at poor performance
- › Developmental
 - Mastery
 - 3 elements (Head/Strategic, Heart/Motivational, Hands/Skills)

Effective coaching is

Showing up and being present to another person's experience and listening, with both your head and heart

Helping the coachee explore and make sense of their challenges and successes, and what they learned from it all

Helping the coachee to find solutions to challenges

Asking questions that both support and challenge the person you are coaching

Effective coaching is not

Being so prepared that you work out all the answers for the coachee before you even hear or observe their challenges

False praising of the coachee or only focusing on their strengths because you do not want to hurt their feelings

Solely criticizing the coachee

Telling the coachee what to do

Coaching Is Not

Giving Advice

- The gold tip is that the coachee will realize on their own that is even better than any solution that you could come up with. It is essential to avoid giving advice.

Leading Questions

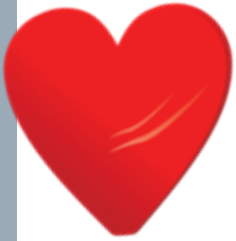
- Hiding advice in your question format. If good coaching is about asking the right question- that doesn't mean that ending with a question mark can make you get away with an embedded advice in the question.
 - Examples:
 - Have you tried to do xxx?
 - Will xxx work in your situation?

Types of Interventions, page 33



Motivational

› Heart Coaching aimed at enhancing motivation



› Is the individual struggling because they are not putting forth enough effort? Are they not trying hard enough because they are embarrassed? Are they quitting too soon because of frustration or fear? Are they getting interference from other habits (e.g., someone well-versed in marketing speak may not know how to tell an authentic story)?

Strategic Motivation

- › Head coaching aimed at helping plan, evaluate, strategize.
- › Is the individual struggling because they lack the skill to execute effectively? Do they not know how to do it? Are they getting interference from older habits or behaviors (like someone who is so used to selling things confusing this with telling a story of self)? Is it something you could model or role play with them?



Skills

Hands Coaching aimed at effective execution of a skill



Is the individual struggling because they do not know how to use the information or skills that they do have.

Do they understand the concepts or underlying principles clearly? Have they not thought it through carefully? Are the goals not achievable? Does the strategy make sense?

Activity, on a chart paper

Come up with a team name, break into groups

› In your team:

- Diagnose the people on page 45. Is it strategic/head, motivation/heart, or skills/hands?
- What questions would you ask as a coach to get to the 'right' diagnosis?
- BONUS! Once you are secure in your diagnosis, what intervention questions do you ask?

Share out!

Key Points

Debriefing and check ins are critically important because they allow the space and time to do these interventions.

The correct intervention is critical to supporting a persons growth and helping them find the answers.

Asking good questions helps us find the appropriate intervention.

Before Break... Think on your back home campaign...



THINK ABOUT AN ISSUE
YOU ARE HAVING WITH
YOUR CAMPAIGN.

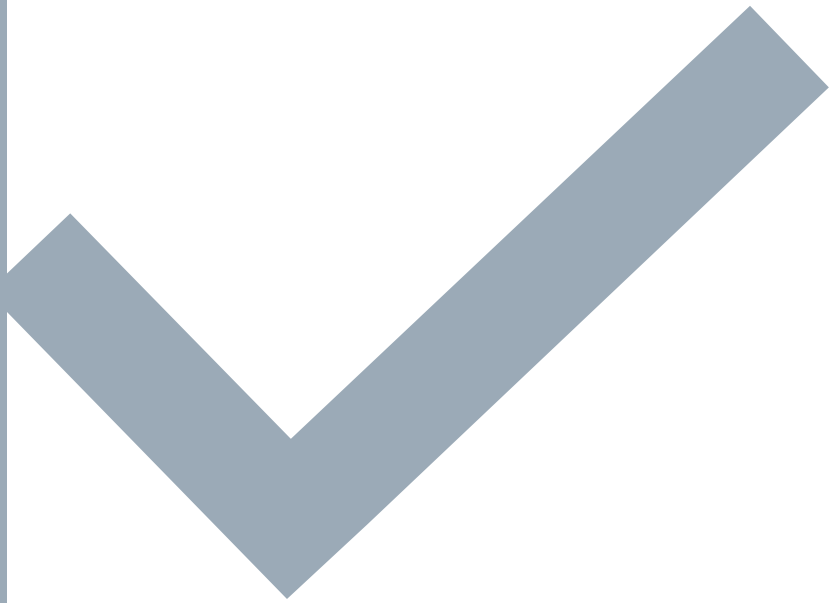


WRITE IT ON A
POST IT NOTE.

Break Time!



Diagnosis in Coaching





Two facilitators will demonstrate a coaching conversation

Model!



Observations

Find a new friend- Triad Practice

- › Get into groups of 3. Someone you have not worked with today or yesterday if possible
 - One person will coach
 - One person will be coached
 - One person will observe.
- › 10 minutes and switch to a new role.
- › We will get to 2 of the 3 roles in your triad.



Debrief: Do not move...

What was a question that you heard or had asked of you that helped bring something to light?



Coaching the Shift from Services to Organizing

Katie



Service to Organizing

Service



Organizing



Two Models , page 107

› Organizing

- › Continual and power-building.
- › The union is understood as a collective vehicle for members to build power together.
- › Success is measured not just by contract wins, but by the number of members actively involved in identifying issues, leading campaigns, and solving problems.
- › Leadership is intentionally expanded — new leaders are consistently invited into roles such as building reps, issue organizers, and bargaining team members.
- › The culture reinforces the belief that “we are the union,” and that meaningful change comes from collective action, not just representation.

› Service

- › Episodically and transactionally.
- › The union is primarily seen as a provider of services: filing grievances, negotiating contracts, enforcing board policy, and resolving individual member issues.
- › Success is measured by outputs such as the number of grievances filed or resolved, contract settlements reached, and membership totals maintained.
- › Participation is concentrated in formal roles — officers, staff, bargaining teams — while most members engage only when they need assistance.
- › The culture reinforces the idea that “the union handles it” on behalf of members.

Where is your local on the continuum?

Continuum





Activity! You choose!
Keep the groups to 5-6, go to second
choice if need be

- 1) Political Action Committee
Drive/Committee
- 2) Bargaining
- 3) Membership
- 4) Grievances/Arbitration
- 5) Answering Member Questions
- 6) Budgeting
- 7) Finding Members for Committees
- 8) Information Sharing

Create a T- Chart : Your Union Activities

- › What could you change about this task that makes it closer to an organizing culture (right side)?
- › What current behaviors, mindsets, or practices about the task are service oriented (Left Side)

Changing the
mindset, culture, and
practices of being
a service-oriented
culture

Service



Coaching a Building Rep (page 104)

Scenario for Triad Activity:

A building rep calls the office looking to get help with a member who is facing a bad evaluation. They want the local president/staff member to step in.

How do you coach the building rep to take on this situation and support their colleague. Note they like the admin and think the colleague may need help, but the admin is being overly harsh.

- **Person A – Building Rep:**
- **Person B – Coach:**
- **Person C – Observer:**



Share Out!

Key Points!

- › Helping build member agency is how we shift a service culture.
- › Engagement is the best way to retain members.
- › Larger engagement of the members leads to more creative and not typically considered outcomes. Increases capacity of union to act and do more!
- › More people involved = harder to burn out and harder for the boss to come down on people.
- › Engagement and moving towards an organizing model is how we shift towards a more inclusive union culture, away from “the union” to “our union”.
- › Any plan that does not include engage members, cannot be a part of our plan.



LUNCH

12:00 – 1:00 P.M.

Using Assessments to Guide Coaching

Bekah



The Assessment Tool (pg 23 in PEPs)

- › Vision: Having a clear vision of the power the leaders, and team are building.
- › The Now: Understanding where you are beginning.
- › The How: How to support team leads in using the tool

Group Work (**20 minutes**)

Divide into groups of 3: 2 people who completed an assessment and 1 person who did not.

1. What are the union's strengths?
2. Overall, what are the largest challenges?
3. What are the main barriers?
4. What are the top 3 priorities?

10 tips for talking about race: additional resources

Coaching questions: PEPS pg. 98

Equity questions: pg. 43



Key Points

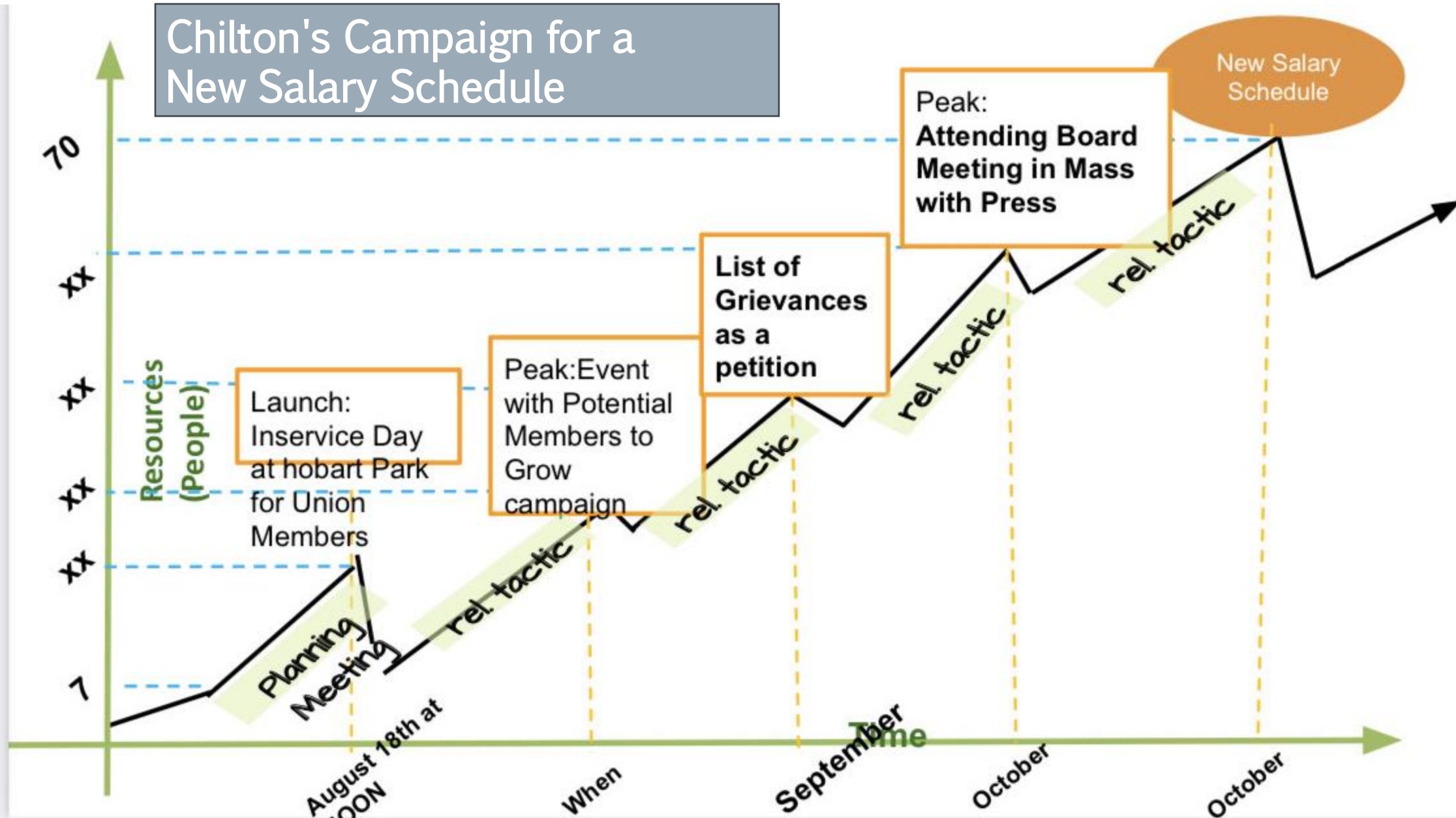
- › Helps you understand where are you so you can be intentional about where you need to go.
- › Helps to provide a shared objective picture
- › Supports Strategic Planning
- › Builds leadership awareness and accountability
- › Encourages member driven action

Coaching A Campaign Leader

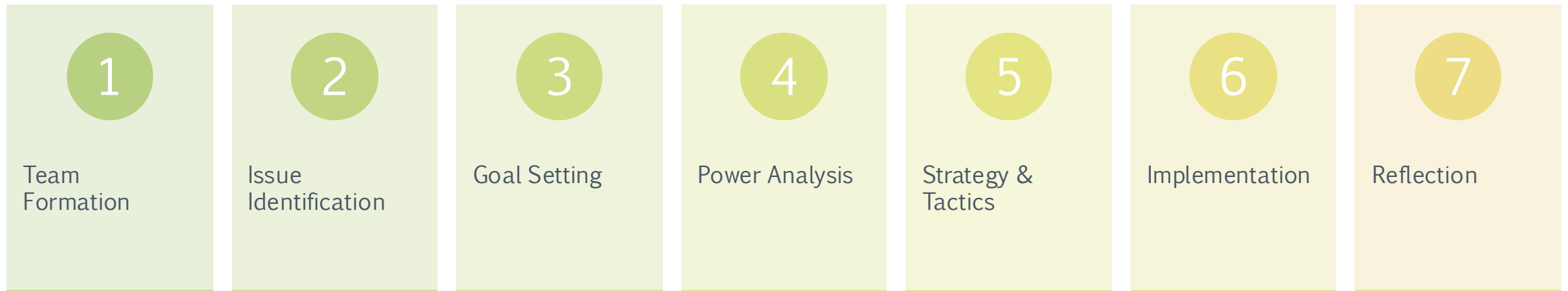
Kristin



Chilton's Campaign for a New Salary Schedule



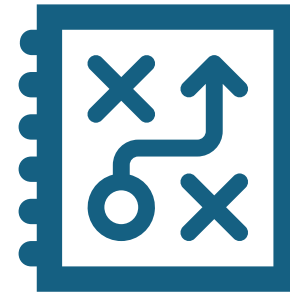
The Stages of Campaign Planning



Why does having a Campaign Plan matter?



Why do we need a written plan?



What is challenging about developing a plan?

Campaign Coaching

What It Is	What It Isn't
Helping organizers become strategists that lead powerful campaigns	Making key strategy decisions for a group
Supports a growth mindset that includes reflection and thinking through challenges	“Answering questions that come up” as an external consultant
Balancing the need to learn and develop skills with running a “live” campaign	Having “catch up calls” without preparing questions to support the group through challenges

Why is coaching critical to a winning campaign?

Coaching helps leaders.....

- Center curiosity and how to improve effectiveness.
- Build their own capacity to act.
- Focus on how to grow and have a growth mindset.
- Overcome challenges and tap new possibilities.



Designing Interventions For Coaching



Observation - What
do I see and hear?
What is the
challenge?



Diagnosis - Why is
the problem a
problem?



Intervention –
Questions to create
space for
reflection

Questions for Sharpening Assessments



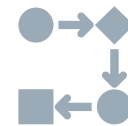
How do you
know that?



What kinds
of evidence
do you
have?



When have
you seen
that
happen?



What would
have to
happen to
change
that?



If you say,
"Yes" to this
opportunity,
what will you
have to say,
"No" to?

Questions for Getting "Under the Surface"

- You mentioned a challenge your group is dealing with. Let's slow down a bit. **What else might be going on there?**
- Sounds like X has been challenging. **What might the bigger pattern or challenge be?**
- We've covered the urgency challenges rising to the surface this week. But I want to make sure to check in about 'the bigger picture.' **In the grand scheme of things, what other things are important for us to spend time on?**

Questions for Prioritizing:



Which of these things feels most urgent for us to figure out today?

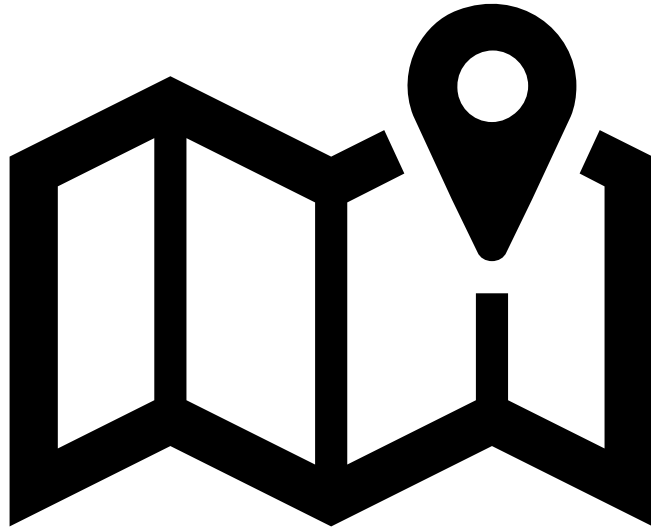


Is that what you wanted to talk about today?



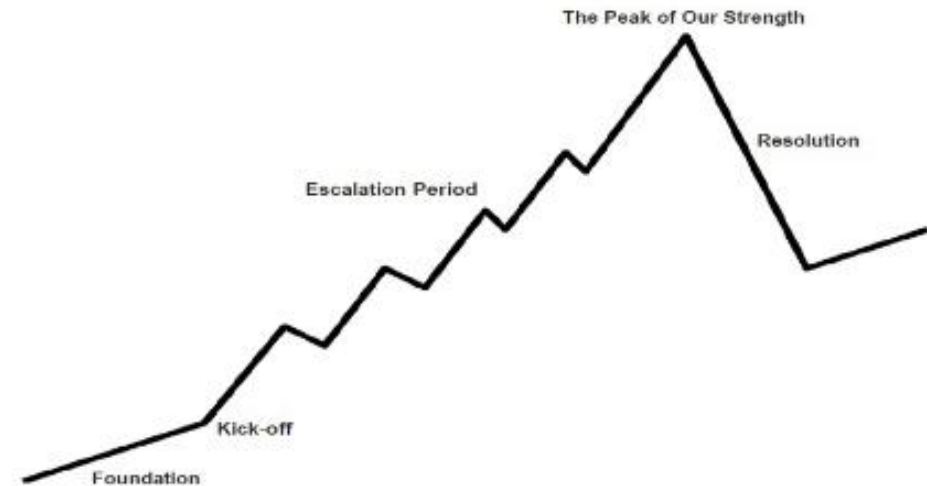
How does that align with the campaign plan?

Knowing where you are will help your CO₂ ↓



CAMPAIGN MOUNTAIN

Phases of a Campaign



Issue Identification

Define the specific, tangible issue to address—moving from broad problems to actionable focus.



HOW DO YOU KNOW
PEOPLE CARE ABOUT
THIS?



IS THIS THE
ROOT CAUSE?

Team Formation

Establish a core group with clear roles, shared purpose, and commitments.



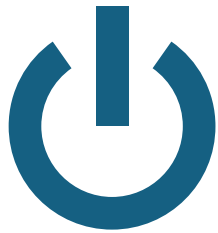
Is your team made up of trusted and respected leaders?



Does your team have representation from each school/worksite?

Power Analysis Questions

Analyze the landscape: identify decision-makers, allies, opponents, and the systems influencing the issue.



Does this person have the power to make the change you want?



Who might be in opposition of this?



Why hasn't this been fixed already?

Goal Setting Questions

Set clear, measurable, and motivating goals that define what success looks like for the campaign.



How will you know you've won?



What might look like a win along the way?

Implementation Questions

Put the plan into action, mobilizing people and resources to execute tactics effectively.

- › How will you track who is doing what?
- › How will you be in communication with leaders from each site?

Reflection Questions

Evaluate outcomes, celebrate wins, and identify lessons to strengthen future campaigns.

- › Knowing what you know now, what would you have done differently?
- › How could you have pushed through that challenge?

Strategy and Tactics Questions

Develop creative strategies and concrete tactics to leverage resources and achieve campaign goals.



How will you know people are ready to take that step?

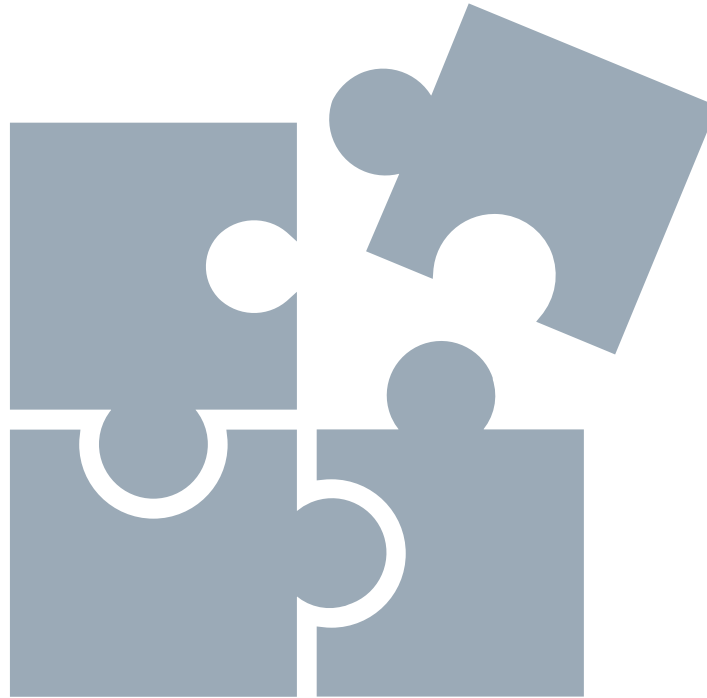


What will your campaign look like in the school?



Is there a slogan that relates to your goal?

Break Time!



What's the Difference?

› Campaign Coach

- › Holds campaigners accountable to their values and decisions
- › Asks good questions to get "underneath" sticky situations, shares experiences and helpful resources
- › Creates safe space for campaign lead to struggle and try out new ideas

› Campaign Organizer

- › Holds members accountable to campaign tasks
- › Creates campaign plans
- › Tracks participation and outcome of tactics towards goal
- › Builds a campaign organizing team that is accountable to winning the campaign

Campaign Diagnosis and Intervention Activity



Review Scenarios on Page 101-103



What is the Observation



What is your Diagnosis



What questions will you intervene with?



Write on chart paper

Key Points

- › A campaign plan is a commitment the team has made.
- › You are not directing the campaign but asking the questions that put its leaders on track **for themselves**.
- › Your intervention can create a fresh perspective and provide insight on how the leader might approach:
 - Fear
 - Internal disagreements
 - Unseen obstacles
 - How communications on a win will be carried out

Coaching Triads

Melissa Dan



Coaching Framework

- Coach the person not the problem.
- What are the barriers within yourself that is getting in the way of what you want or can do?
- Expanding the capacity of leaders increases the capacity of the team to drive the campaign.

Core Competencies in Coaching

- › Understanding the ways coaching can support growth
- › Centering the Leader's Agenda
- › Asking Powerful Questions
- › Active Listening
- › Diagnosis
- › Curiosity, Interrupting, and Acknowledgment
- › Self-Management



The Coaching Conversation

- › Coaching supports campaign leaders.
- › Center curiosity and how to improve effectiveness.
- › Build their own capacity to act.
- › Focus on how to grow and have a growth mindset.
- › Overcome challenges and tap new possibilities.





The Structure of a Coaching Conversation

Pause: Take a moment to come into presence and intention.

Ground: Tap into what's most important. What would you like coaching on today?

Align: What's getting in the way? What are the possibilities to move the forward?

Act: Clarity needs to act. What's standing out for you? What might some next steps be for you?

Acknowledge: I want to acknowledge the work you did today.

Coaching Practice - 15 minutes

- › Scenario 1:

You left your last coaching session with action step to have 1:1s with 5 newly identified leaders. You emailed them all but only got one response and have had one 1:1.

- › Practice in pairs – 10 min
- › Whole Group Debrief – 5 min

Coaching Practice – 15 minutes

- › Scenario 2:

You are creating an organizing team at a worksite. Two white veteran teachers signed up.

- › Practice in (new) pairs – 10 min
- › Whole Group Debrief – 5 min

Key Points

- › The structure of a coaching conversation is to guide a person or team on the steps they need to take - not solve their issue or campaign.
- › Coaching can help leaders get “unstuck.”

Give us
Your
Feedback
Please



Ending it right

Carrie