



Campaign Academy:

Coaching Skills for Developing Campaign Leaders



REVISED Participant Handouts

Affiliate Staff, Members, and Leaders who would like to develop coaching skills to support the growth of leaders advancing campaigns and building the power of their union. Coaching is a practice that can enable leaders to gain greater clarity, understand their own agency, explore different paths and how to overcome challenges. This coaching training will incorporate how to develop a leader as a whole person to deepen their vision, determination, and capacity to lead. This coach training is a part of Campaign Lab which supports leaders who are building campaigns and organizing efforts that center social justice and multi-racial alliances with communities.

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Community Agreements for Our Time

Awareness and Self-Knowledge

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

Listening for Understanding

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

Being Gracious

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

Staying Engaged

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

Being Open and Suspending Judgment

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

Saying "I"- tell your truth

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

Lean into Discomfort

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

Reaching Empathy

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

Expecting Non-Resolution and Non-Closure

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

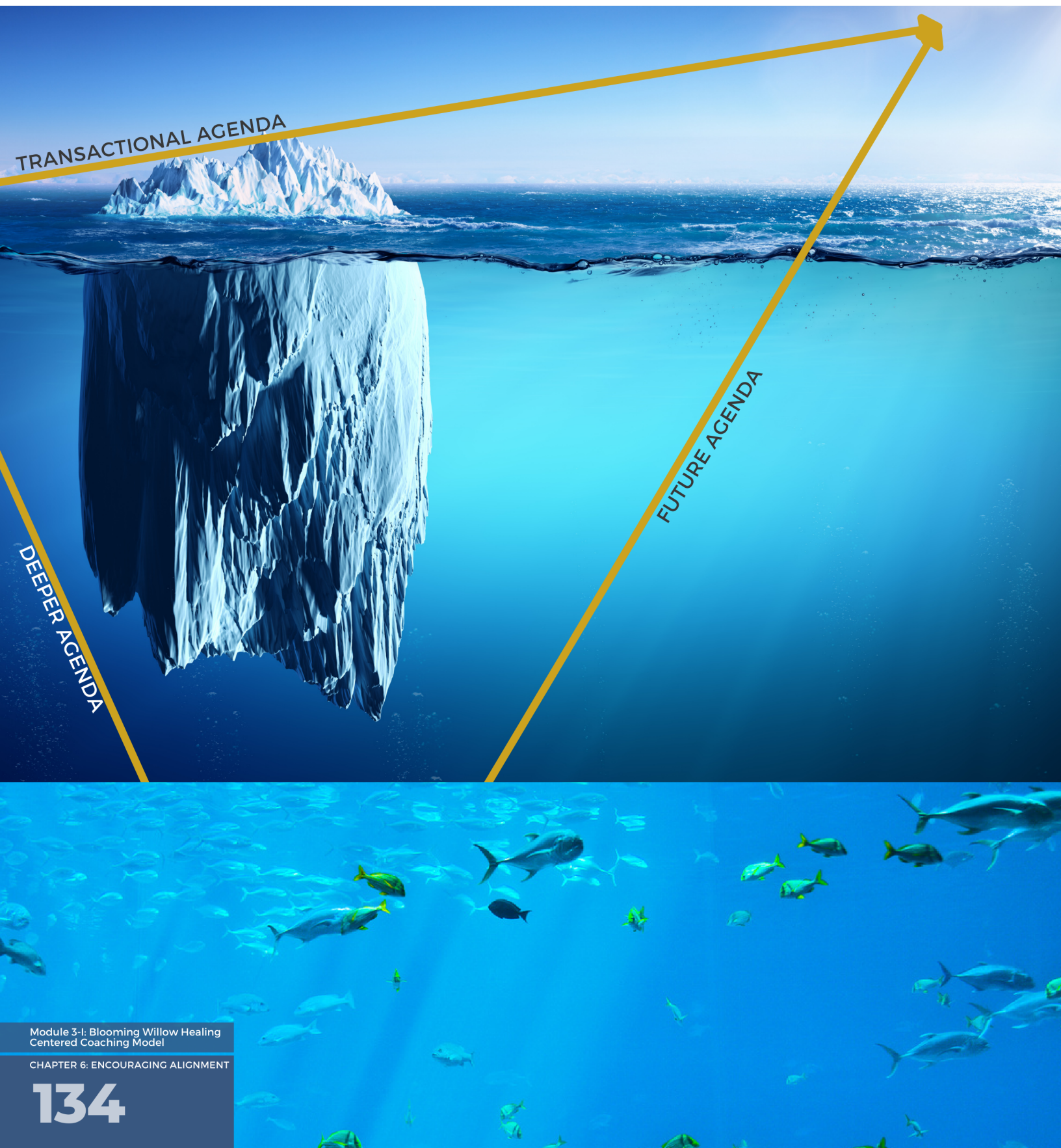
**Adapted from "Embracing equity and inclusion", Annie E. Casey Foundation*

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

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

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

EXPLORING THE 3 CLIENT AGENDAS: TRANSACTIONAL, DEEPER, FUTURE



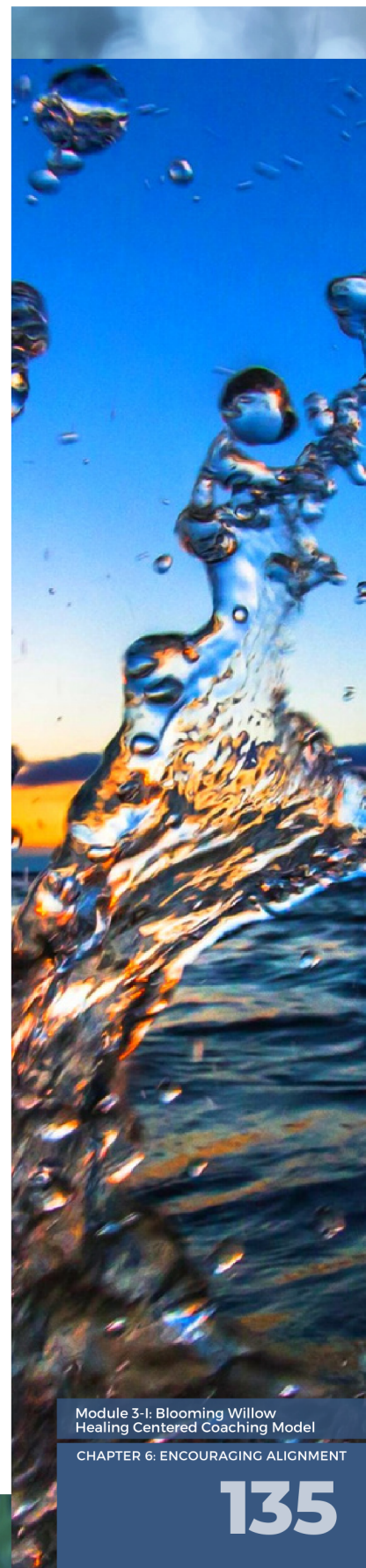
AGENDA 1: TRANSACTIONAL

The Transactional Agenda

The Transactional Agenda is contained within the top layer of the iceberg, which means that our clients are typically most in touch with what is happening at this level.

This is captured in the coaching session when the client answers the question, "What do you want coaching on during this session?" The client's response to this question becomes the Transactional Agenda for the session. The Transactional Agenda provides insight into what the client is noticing that they want to pay attention to in their lives. It also gives us information on the area(s) in which the client wants to move, and find clarity and strategies that support them to act. On the surface, it can appear to be the only agenda the Healing Centered Coach should pay attention to during the session as it's the one the client names first. However, Healing Centered Coaches should be aware that when the focus solely on the Transactional Agenda, the session is only surface level and does not reach to the depth required to invite Healing Centered Coaching. Here are a few questions that coaches can ask about the Transactional Agenda:

- **What do you want coaching on today?**
- What's the lesson for you in this situation?
- How have you been showing up?
- What would growth look like for you in this area?
- How are you taking care of yourself in this process?
- What would you want to happen?
- How is it impacting your life?



AGENDA 2: DEEPER

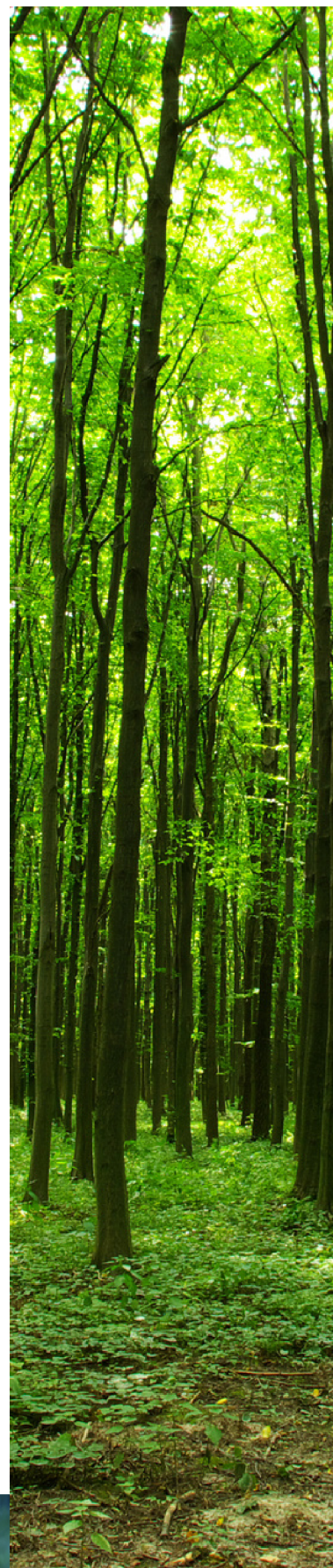
The Deeper Agenda

The Deeper Agenda represents what is beneath the surface of our client's agenda, which includes all of their conscious and subconscious feelings, values, and beliefs that influence their actions and behaviors.

This agenda is where the healing process for our clients begins, when they are able to move to a place of deeper exploration around their topic of choice. We invite the clients to lead the exploration to the Deeper Agenda by asking the question, "What's important about [their topic of choice]?" Their response provides deeper insight into how they may be feeling in connection to the topic, where they may be noticing they are not aligned and what their present wise-Self is communicating about the situation. Working with clients on the Deeper Agenda requires that coaches give themselves permission to encourage the client to Pause and focus inward as they explore what lies beneath the surface. Healing Centered Coaches invite clients to this agenda to support them in gaining new insight, clarity, and awareness of what lives in the deep. The following are a few questions that coaches can ask about the Deeper Agenda:



- **What's important about this?**
- What's underneath all this?
- What beliefs are impacting your ability to grow?
- What feelings come up as you think about this situation?
- How are your values being honored/dishonored?
- What would shift if you knew what you wanted was possible?
- How has [insert emotion] influenced how you are showing up?



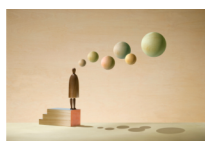
AGENDA 3: FUTURE

The Future Agenda

The Future Agenda serves as a reminder that our client's agenda for the session includes an opportunity for them to connect to what's next in their lives, beyond the session.

This agenda is invited into the space when coaches ask questions that generate answers to who they are becoming, what's next, what's evolving, how they want to grow, how they want to heal, etc. These big questions are an opportunity for the client to get curious and invite their wise-Self as a guide to provide insight on their growth and healing journey. While the Future Agenda is present in every session, it typically won't emerge without the invitation from the coach to the client. Therefore, coaches are encouraged to weave in questions about the Future Agenda as they facilitate Healing Centered Coaching sessions with clients to support them to stretch, gain insight, and connect to the big picture. This invites them to step into their future selves while also building momentum and energy as they stretch into action. The following are a few questions that coaches can ask about the Future Agenda:

- **How is this [coaching topic] connected to who you are becoming?**
- What would healing look like for you to move forward powerfully?
- How are you evolving/growing?
- What would your future self tell you to do about this situation?
- How would you like to grow and heal?
- What do you want to shift in your life?



Adapted From: *Coaching for Transformation: Pathways to Ignite Personal & Social Change 2nd Edition* by Martha Lasley, Virginia Kellogg, Richard Michaels, Sharon Brown

Module 3-1: Blooming Willow
Healing Centered Coaching Model

CHAPTER 6: ENCOURAGING ALIGNMENT

CURIOSITY

Curiosity supports the heart-to-heart connection between coach and client that fuels the powerful partnership. It provides an opening that encourages the partners to let go and explore, discover, and uncover new possibilities.

As Healing Centered Coaches, it's important to build awareness that curiosity is necessary to be able to hold "not knowing" both in terms of what is going on, and "not knowing" in terms of having a set way to respond. One of the many benefits of "not knowing" and being curious is an openness to new perspectives and a willingness to try new ways forward.



CURIOSITY SERVES AS A REMINDER TO EXPLORE THOSE THINGS THAT ARE HIDDEN BENEATH THE SURFACE.

CURIOSITY VS. JUDGMENT

"Within the first seven seconds of meeting someone, our brain makes 11 different decisions about them including their intelligence, socioeconomic status, education, competence and trustworthiness."

- Anna Hinson

JUDGMENT

- Invites feelings of "Assessment"
- Encourages logical self to emerge
- Invites problem-solving
- Encourages forming opinions
- Invites decision-making

CURIOSITY

- Invites feelings of "Safety"
- Encourages authentic self to emerge
- Invites "not knowing"
- Encourages exploration
- Invites discovery

Activity: You be the judge...

Pick someone you don't really know in a group and just observe the person. Observe for 30-60 seconds. As you observe start listening to the story you are creating in your head. What story did you create? What assumptions did you make? What "facts" did you create? What did you notice about yourself?

UNPACKING JUDGMENT



JUDGMENT IS AN OPINION OR DECISION BASED ON THOUGHTS, FEELINGS, AND EVIDENCE.

And we make hundreds of them every day. It's a subconscious process people cannot control.

As Healing Centered Coaches, it's important that we understand the role of judgment and the beauty that it brings in helping us to navigate life. Judgment serves as a trust companion, supporting us in making decisions about how to stay safe, move forward, and achieve the best results. It acts as a set of metrics that we hold to evaluate our experiences.

In Healing Centered Coaching, judgment is not invited because it creates barriers that prevent clients from moving outside of set parameters. It forces clients to evaluate themselves instead of being curious about themselves.

It's also a strategy that many clients attempt to bring into coaching. Therefore, growing our awareness of its role supports us in challenging it during our sessions.



The mind is a judging machine. There's nothing inherently wrong with these judgments. It's the nature of the mind to judge.





UNPACKING JUDGMENT CONT'D

Sometimes, these judgments are helpful. They can lead you to understand the things that bring you up, give you energy, and fill you with purpose. They can help you understand what doesn't resonate with you and what leaves you feeling drained.

But when left unchecked, the judging mind is taxing and controlling. It takes significant energy to evaluate every experience you encounter.

Everything that we experience is filtered, categorized, and dealt with in some automatic way.

- Some things are judged as "good," so we *grasp* for more, and *cling* to what we have.
- Other things are judged as "bad," so we hide, resist, and run away from them.
- And everything else? That's judged as "neutral" so for the most part, we ignore it entirely.



CHALLENGING JUDGMENT & LEANING INTO CURIOSITY: ACTIVITY

When you're unaware that these judgments are influencing your behavior, you're just along for the ride. Like a marionette reacting to a puppeteer, clients become trapped by their conditioned judgments and reactions. Hence, our role as Healing Centered Coaches is to interrupt patterns of judgment in order to invite curiosity: doing so leads to awareness-building and alignment.

TURN THE FOLLOWING JUDGMENTS INTO POWERFUL COACHING QUESTIONS THAT INVITE CURIOSITY:

- 1** You can't afford to be an entrepreneur: you need a job.
- 2** I don't know what I want.
- 3** It takes years to be good at a new skill.
- 4** Sometimes you must let go of your dreams.
- 5** Eating a healthy diet is hard.
- 6** Certain people are just not leaders.
- 7** The people in my community just don't care.
- 8** There is not enough money.
- 9** It's just a helpless situation.
- 10** Supervisors need to have a degree.



INTERRUPTING

Interrupting is described as the process of stopping someone from continuing what they are saying or doing, by suddenly speaking to them, or making a noise, etc.



PAUSE AS A PRACTICE - CORE

As simple as this process sounds, the interpretation of what it means varies greatly from person to person. Listeners' own conversational styles influence whether they interpret simultaneous, overlapping talk as interruptive or cooperative. We all have different opinions about how a good conversation is supposed to go.

2 CONVERSATIONAL STYLES

1. High-intensity speakers are generally uncomfortable with moments of silence in conversation and consider talking at the same time a sign of engagement.
2. Low-intensity speakers find simultaneous chatter to be rude and prefer people speak one at a time in conversation.

In a recent study of high and low intensity groups, researchers found that the groups experience the same environment very differently. The high-intensity group reported that conversations where people spoke simultaneously when expressing agreement were not interruptive but engaged and friendlier than the conversations with pauses in between speaking turns. In contrast, the low-intensity group perceived any amount of simultaneous chitchat as a rude interruption, regardless of what the speakers were saying.

TYPES OF INTERRUPTION



Cooperative interruptions

Agreement: shows support or elaborates on the speaker's idea.

Assistance: provides a word or phrase the speaker was searching for.

Clarification: asks for an explanation of something just said.

Intrusive interruptions

Disagreement: jumps in to voice a different opinion.

Floor-taking: takes over the conversation, but stays on the same subject.

Topic-change: cuts in to change the subject.

Summarization: paraphrases the speaker's point, often minimizing it.

Coaching Tips:

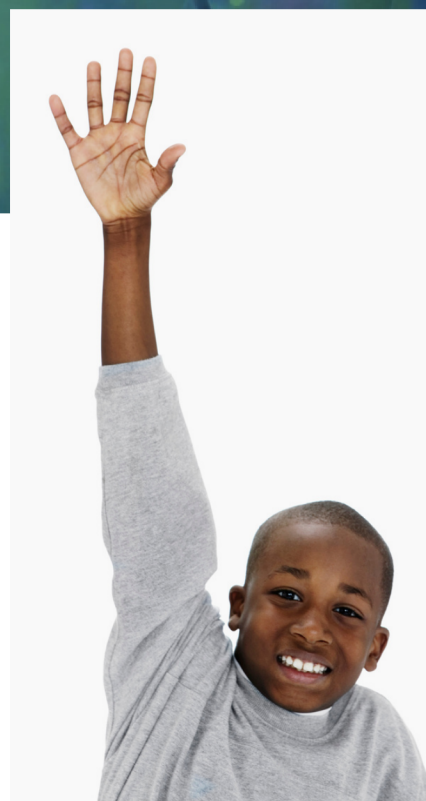
- Help clients discover for themselves the new thoughts, beliefs, perceptions, emotions, moods, etc. that strengthen their ability to take action and achieve what is important to them.
- "Bottom-line" or understand the essence of the client's communication and help the client get there rather than engaging in long descriptive stories.
- Demonstrate the ability to be fully conscious and create a spontaneous relationship with the client, employing a style that is open, flexible, and confident.

PERMISSION TO INTERRUPT

As Healing Centered Coaches, interrupting is part of our work in service of our client's transformation. We see interrupting as an opportunity to invite the client to a deeper place that will support their growth and healing.

As coaches, we do this by giving ourselves permission to interject when clients are sharing the following:

- Background information – as coaches we only need to know the impact on the client... not what led to it.
- Long stories – as tempting as it is to listen to stories, as coaches, we only need to know what's important about the story, not a re-telling of the story.
- Details about others – the focus of the coaching session should be about the client and not the people surrounding the client.
- Loops – moments when we notice our clients are repeating the same stories, words, or phrases.
- Confusion – moments when the coach or client is lost and needs a moment to reset before they continue.
- Boredom – when we notice a lack of energy or interest in the direction of the session from the coach or client.



Unpacking Healing Centered Coaching Competencies

CHAPTER 3: INTRODUCTION TO CORE HEALING CENTERED COACHING COMPETENCIES

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AUTHENTIC INTERRUPTING: ACTIVITY

One of the most challenging things for Healing Centered Coaches around interrupting is to figure out how to do it without energetically throwing the client off track. Therefore the following activity was designed to give coaches an opportunity to develop authentic interrupting prompts that will allow them to pause the client. Please take a moment to identify 10 interrupting prompts.

10 INTERRUPTING PROMPTS

Example: Let's take a moment to breathe.

1

2

3

4

5

6

7

8

9

10



Unpacking Healing Centered
Coaching Competencies

CHAPTER 3: INTRODUCTION TO CORE
HEALING CENTERED COACHING
COMPETENCIES

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PAUSE MINDFUL BREATHING TOOLS



EXERCISE:

Equal Breathing

Equal breathing is a breathing technique that can help calm the mind, body, and soul. It's perfect for reducing stress, calming your nerves and increasing focus, and can be done anywhere and at any time.

INSTRUCTIONS

Find a quiet place to sit, set a timer on your phone (to start try on 3-5 minutes), close your eyes, and begin take inhales and exhales at your own pace.

Once your find the rhythm of your breath, become more intentional with your breath.

Inhale through your nose, exhale through your mouth.

Try this on for about 4 cycles of breathing (ex. one cycle of breath is a full inhale and exhale)

Now that you've gotten in tune with your breath, let's slow down your breathing even more.

Take an inhale hold it for 4, 3, 2, 1— exhale let it go 4, 3, 2, 1.

Keep that pace until your timer goes off.



EXERCISE:

Balloon Breath

Balloon Breath is a powerful way to quickly release stress and energy from your entire body. Through a combination of deep breathing and visualization you are able to support centering and grounding in the present.

INSTRUCTIONS

Find a quiet place to sit, set a timer on your phone (to start try on 3-5 minutes), close your eyes, and begin take inhales and exhales at your own pace.

Once your find the rhythm of your breath, become more intentional with your breath.

Inhale through your mouth to the count of four.

Exhale through your mouth, imagining yourself slowly blowing a balloon away from you, and across the room.

Try this on for about 4 cycles.

Now that you've got your pace, exaggerate your exhales.

Inhale through your nose, exhale with your lips pursed, blowing the balloon quickly across the room.

Let it be noisy.



DEBRIEF

Breaking Down Your Breathing

What stood out during mindful breathing?

Overall, what shifted in your body? How do you know?



PAUSE

AS A PRACTICE

LEARNING TO PAUSE

GRANT PERMISSION TO PAUSE

Shifting from Doing to Being

INVITE PRESENCE

Be Here Now

CHECK-IN WITH SELF

EXPRESS GRATITUDE

GRANT PERMISSION TO MOVE WITH INTENTION

Shifting from Being to Doing



SHIFTING FROM DOING TO BEING

Accepting the invitation to shift from “Doing” to “Being” is easier said than done. This is because our capitalist society rewards “Doing” and shames “Being”. Therefore, to support ourselves and our future clients in shifting between modes, it’s important for us to further understand the significance of, and difference between, these two concepts.



Doing

Focus: The job of this mode of mind is to get things done—to achieve particular goals that the mind has set.

The basic strategy to achieve such goals involves something we call the “discrepancy monitor”: a process that continually monitors and evaluates our current situation against a model or standard—an idea of what is desired, required, expected, or feared.

Once this discrepancy monitor is switched on, it will find mismatches between how things are and how we think they should be.

In doing mode, the mind often travels forward to the future or back to the past, and the experience is one of not actually being “here” in the present much of the time.



Being

Focus: The job of this mode of mind is “accepting” and “allowing” what is, without any immediate pressure to change it.

“Allowing” arises naturally when there is no goal or standard to be reached, and no need to evaluate experience in order to reduce discrepancies between actual and desired states.

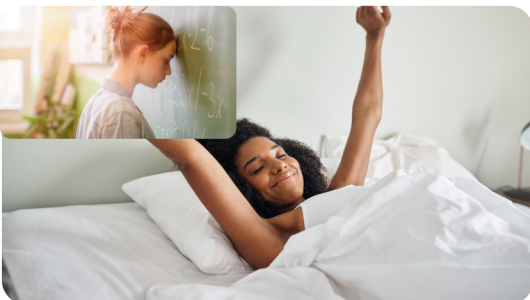
In being mode, the mind has “nothing to do, nowhere to go” and can focus fully on moment-by-moment experience, allowing us to be fully present and aware of whatever is here, right now.

Once in the being mode, the experience of the moment can be processed in its full depth, width, and richness.

PRACTICING SHIFTING FROM DOING TO BEING...

“Doing mode involves thinking about the present, the future, and the past, relating to each through a veil of concepts. Being mode, on the other hand, is characterized by direct, immediate, intimate experience of the present.”

— Zindel Segal



- (1) Acknowledge that you are in a mode of "Doing" by connecting to the task, feelings, and behaviors that you are conducting. Remind yourself that you may be stuck in the past or zooming towards the future.
- (2) Take a deep breath...
- (3) Set an intention to move away from the "Doing" mode and into the "Being" mode.
- (4) Take two deep breaths...
- (5) Give yourself permission to shift into "Being", which may mean pushing through the urges/sensations that are encouraging you to continue to "Do".
- (6) Take two deep breaths...
- (7) Invite the silence – quieting your mind and relinquishing all duties and responsibilities at this time.
- (8) Take three deep breaths...
- (9) Drop into "Being" by reminding yourself that you have “nothing to do, nowhere to go in this moment”. Allow yourself to be present in the *here and now*.
- (10) Breathe for 3 minutes.

Self-Assessment of Local Union Strength and Growth

Use this assessment tool to understand your local's strengths and areas for growth. This assessment will give you greater clarity for developing your plan and identifying your goals for coaching.

Make a copy of this assessment, and in the column on the left write the number 1-3 that best describes your local union. At the end of each section, add your total number. Once the rating is completed, add the rating numbers together by section and overall. Then also answer the general questions either in writing or through a conversation with your team or coach. We encourage teams to use this tool to build a shared understanding of their work ahead.

Organizing and Engaged Membership				
	Rating	1	2	3
Engagement		Members actively and regularly participate (60%+) in meetings, events, actions, and campaigns; active communication and involvement across all levels of the union; there is intentional and routine assessment of race, class, and gender inclusion with visible outcomes.	Members participate occasionally (30%-60%); inconsistent communication; some efforts to involve members; stated equity and inclusion goals in the local.	Limited member participation and limited communication (<30%); engagement activities are rare or ineffective.
Structure		Clear, well-defined leadership roles and committees; effective organization supports union goals and member needs; there is a visible and measurable representation of leaders across race, class, and gender identities.	Basic structure in place; some roles or committees are unclear or underutilized; moderate effectiveness; there is a stated intent to be inclusive of all race, class, and gender identities.	Lack of structure or poorly defined structure; leadership roles unclear; few ways for members to get involved or have input, union participation is represented by one social group; a small core of the same people do all the work.
Growth		Consistent and strong recruitment and retention strategies in place; membership recruitment tactics include strategies to intentionally recruit across race, class, gender identities, ability, language and other potential equity-based barriers.	Some growth observed; recruitment and retention efforts are sporadic or partially effective; demographic data is collected and occasionally analyzed, but there is little effort to intentionally reach out to underrepresented groups.	Membership stagnant or declining; little to no active recruitment or retention strategies.
Leadership Development		Comprehensive programs in place to identify, train, and mentor future leaders; leadership opportunities are accessible and actively promoted; leaders are involved with campaigns and activating the membership; intentional recruitment	Some leadership development activities offered; identification and mentoring of leaders is inconsistent; there is a belief that diversity of leadership is good for the union.	No or minimal leadership development; few or no opportunities for members to develop leadership skills.

		across race, class, and gender identities into all aspects of leadership development.		
Majority Status		Union holds clear majority status with membership over 80%; this status is actively maintained and leveraged for member benefit.	Union has majority status between 50% and 80%, with fluctuating membership or contested recognition.	Union holds less than 50% membership or lacks majority recognition; limited influence over workplace decisions.
Committees		Committees are active, well-organized, and effectively contribute to union goals; committees have broad member participation and clear outcomes; Union leadership is intentional about recruiting and supporting committee leaders and members who represent diverse constituencies.	Committees exist and operate intermittently; some member involvement and moderate impact on union activities; there is a belief that all committees should be diverse.	Committees are inactive, poorly organized, or non-existent; minimal member participation and limited contribution to union goals; members don't know how to join committees or what success looks like.
Calendared Events		Union regularly plans and executes a comprehensive calendar of well-attended events that engage members and support union goals; these events have a number of ways that participants can access them; translators are available.	Some events are planned and occur with moderate attendance; calendar may be inconsistent or incomplete; some planning for accessibility happens for some meetings.	Few or no events are planned; attendance is low; calendar is poorly managed or non-existent.
Organizing + Engaged Membership Total				
Bargaining and Worksite Advocacy				
	Rating	1	2	3
Bargaining		Bargaining process is well-organized, member-driven, and engages community partners or coalition. Wins achieve strong standards for work, education, and community issues. Members are informed and involved throughout; intentional engagement and bargaining strategies designed to center equity in the process and outcomes.	Bargaining occurs with moderate member input; contracts meet some but not all member needs; communication is occasional; there are attempts to be inclusive in communications; bargaining typically stays focused on workplace issues rather than demands for students, parents or the common good.	Bargaining is poorly organized or lacks member involvement; contracts are weak or ineffective; communication is minimal.
Relationship with Administration		Union drives agenda with administration; union input regularly leads in decision-making; union leads on diversity, equity, and inclusion decisions.	Functional relationship with some cooperation from administration; occasional challenges or communication gaps; union has a stated belief that	Administration disregards the union frequently; minimal communication or cooperation with administration.

			diversity, equity, and inclusion are important.	
Advocacy		Union actively advocates for member rights and community interests often in coalition with others, perhaps incorporates bargaining for the common good; effective campaigns and sustained efforts to set policy and win public opinion; union members participate in lobby days or other policy advocacy; union is a clear leader in race, class, and gender justice.	Some advocacy efforts made in terms of engagement with elected officials but does not translate into gains or change; not involved in active coalitions; elected leaders or staff engage in advocacy but members have limited involvement; union has a stated social justice belief.	Little to no advocacy; efforts are minimal, uncoordinated, or ineffective in advancing member or community interests. Local does not have a member rights campaign. Local does not have a plan to coordinate with community supporters to win.
Site Access		Union staff and leadership has full access to all worksites for meetings, outreach, and organizing activities protected by contract language; or when staff is barred from entry, well-trained building reps are able and willing to do member representation and worksite members are able to effectively organize at all worksites.	Union staff and leadership has limited or conditional access to worksites; some worksites have strong reps and structures that can restrict or challenge organizing activities.	Little to no access to worksites; union presence is minimal or obstructed.
Willingness of Leadership Team to Organize		Leadership team demonstrates strong commitment to organizing efforts; proactively supports and leads campaigns to grow and strengthen the union; they willingly engage in public fights that advance race, class, and gender justice.	Leadership shows some willingness to organize; supports efforts when prompted but lacks consistent initiative; they have some willingness to lead issue campaigns associated race, class, or gender justice.	Leadership is reluctant or resistant to organizing activities; minimal support or engagement in growth efforts; focus is on services and not organizing.
Bargaining + Worksite Advocacy Total				

Communications

	Rating	1	2	3
Communication		Effective and consistent communication channels exist; all members receive timely, clear, and relevant information in their first language; texting, phone banking and email may be used in member communication; union organizers track the effectiveness of their communications and adjust their communications strategies to increase	Communication channels exist but are inconsistently used; there are some translated documents; some members may miss important updates; there are some efforts at making communications accessible.	Communication is sporadic or unclear; many members lack access to important information; some workers or members don't realize there is a union. Members can't easily access bylaws, bargaining timelines, grievance decisions, bargaining priorities, etc.

		accessibility and improve efficacy as needed.		
Member Education		Comprehensive education programs regularly offered with intentional plans for including all race, class, and gender identities; members are well-informed about rights, contracts, and union activities; programs are developed to intentionally include race, class, and gender identities in materials and content; member education addresses current social issues such as attacks on immigrant families and federal cuts to critical funding.	Some education programs offered sporadically; members have partial understanding of rights and union functions; there are some specialized programs addressing race or gender identities.	Little to no member education provided; members lack understanding of their rights and union roles.
Marketing and Social Media Presence		Union maintains a strong, consistent, and engaging presence across multiple platforms; effectively promotes union activities and grows membership awareness; union may have online communities for members to engage; intentional and targeted plans to reach all race, class, and gender identities.	Union has some presence on social media or marketing channels; engagement and consistency are moderate; there are efforts to reach a diverse audience on multiple platforms.	Minimal or no social media or marketing presence; limited outreach and promotion of union activities.
Mission and Vision		Clear, well-communicated mission and vision guide all union activities; members understand and support these foundational principles.	Mission and vision exist but are inconsistently communicated or understood; partial alignment with union activities.	Mission and vision are unclear, outdated, or not communicated; little member awareness or alignment with union direction.
Communications Total				

Politics and Policy

	Rating	1	2	3
Political Action		Union regularly sets the public perception of the issues in local political campaign. Union actively runs or works in coalitions to run political campaigns and advocacy; members are informed and mobilized; Union centers equity in public education and educator needs in public debate. Union endorsed candidates regularly win. All candidates regularly seek union endorsement.	Some political activity; members occasionally informed or involved in advocacy efforts; union supports and promotes social justice.	Little to no political action; members uninformed or disengaged from advocacy.

Relationship with Governing Board		Union uses equity racial and social justice to drive their advocacy, organizing, and campaign agendas; union leads influential and regular communication with the governing board; membership is activated to strategically interact with the governing board, union routinely runs or works in coalition to run the school board or campus governance.	Some contact and communication with governing board; influence is limited or inconsistent; union is known to support equity work.	Minimal or no effective communication; little influence on governing board decisions.
Collaboration with Other Local Unions and community organizations		Actively collaborates with other local unions and community organizations through joint actions, resource sharing, and coalition building to strengthen collective power; union intentionally centers equity in its decisions about coalition work.	Occasional collaboration with other local unions and community organizations; some joint efforts or communication established; union is supportive of social justice causes.	Little to no collaboration; operates in isolation without partnerships or shared initiatives.
Politics + Policy Total				

Infrastructure

	Rating	1	2	3
Financial Health		Union maintains transparent, accurate financial records; budgets are well-managed; governance follows best practices ensuring accountability and member trust; has planned for the support of direct-action funding and mutual aid; all financial documents required for affiliation are in order, an equity lens is applied to budget decisions.	Financial records and governance processes are mostly in place; occasional lapses in transparency or management; most financial documents required for affiliation are in order; there is some budget apportioned for social justice programs.	Financial management is poor or unclear; governance lacks accountability, risking member trust and union stability; the union does not have its tax documents in order; union does not have local dues.
Data		Data is contractually provided by management to the union on a regular basis. It is integrated into core union functions, organizing, campaigns and strategic planning. The union uses data to track key metrics and inform resource allocation. The union has dedicated data experts and a secure infrastructure. Data are used to measure key outcomes related to equity. Union leaders and staff at all levels are data-literate and use data	The union has started to use data purposefully for specific campaigns. Some siloed data are used to measure diversity and equity, but not in tracking outcomes. Staff and leaders use basic data analysis to support organizing, bargaining, or communications efforts. The union uses digital tools and databases for basic member and contact management. Access to data is limited to a small group of staff. The union measures the success of	Data use is reactive and inconsistent, often in response to immediate needs like answering a specific question during a campaign. There is no overarching data strategy. Data is managed in siloed systems and analog formats. Digital tools are not standardized, and data analysis relies on a few knowledgeable individuals. The union's use of data has no clearly measured impact on worker outcomes. There is no intentional effort

		to inform their work. The union's data use leads to measurable improvements in member well-being and economic security. Data is used to measure long-term trends in membership engagement and bargaining success. Data insights are leveraged to expand union influence and shape public policy.	specific campaigns using basic data points, such as voter turnout or sign-up rates. Insights are used to adjust short-term tactics.	to measure equity. Campaign successes or failures are not systematically analyzed with data.
Governance		The union membership understands how their union is governed and processes for that run their union; constitution and bylaws are accessible to members and have been developed and maintained with a focus on equity; members are in relationship with multiple levels of leadership and when issues arise members know who to go to; there are union representatives in more than 80% of the worksites, representatives at the school district or university level on decision making committees, leaders re connected to state and national leadership.	The union has a regular schedule to update the constitution and bylaws; updates include the use of an equity lens; there are officer-elections and regularly scheduled executive meetings; officers attend most (meetings, training courses, conferences, the Representative Assemblies); executive meetings are well attended; members are typically not engaged in the governance of their union or aware of policies and procedures for how their union is run; at least 80% of worksites have union representatives.	The union has an outdated or incomplete Constitution and By-Laws, and the union is in a constant struggle to fill leadership positions; there are rarely elections that are contested; less than 50% of work locations have union representatives.
Infrastructure Total				

Assessment by Section and Overall: A lower number indicates an area of strength. A higher number indicates that this is an area for improvement.

1. Has your local set goals for membership growth and participation? If yes, what are they?

2. What do you think are your organization's main strengths that will allow you to build a strong union and effective campaign?

3. Overall, which of the areas above do you think are the largest challenges for your local?
4. In the areas that you've identified as your biggest challenges, what are the main barriers your local faces?
5. Which of the above areas do you think should be the top three priorities for your local to address?

Coaching as a Leadership Practice

(2014)

Why is coaching an important leadership practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching enables others.

Organizing campaigns are rich with challenges and learning opportunities, but we can be fish in the water in which we are swimming, unable to see what we're in the midst of. Coaching can help address this problem. Coaching can help individuals and teams not only overcome the immediate motivational, strategic, and informational challenges that may be hindering their effectiveness, but remind them of the critical role of learning to listen in exercising leadership.

What is coaching in organizing?

Coaching is a direct intervention in an individual or team's work process to help them improve their effectiveness. Some examples of when coaching skills are necessary:

- Helping a leader overcome motivational challenges with their volunteers.
- Assisting a leadership team in creating strategy for their organizing campaign.

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

Elements of Coaching



Coaching requires learning to identify a person’s or team’s strengths and weaknesses to help them mobilize their strengths to overcome their weaknesses. People often know what they “should” do. But fresh eyes can help diagnose specific challenges they face while identifying ways to deal with them.

- **Motivational (heart) coaching** is intended to enhance *effort*.
- **Educational (hands) coaching** is intended to help acquire information or skills
- **Strategic (head) coaching** is intended to help evaluate how to use resources to achieve outcomes.

Coaching Approaches

Corrective

Some coaching is aimed at helping improve poor performance (i.e., the coachee is overall not doing the leadership practice well and needs help getting up to a basic level).

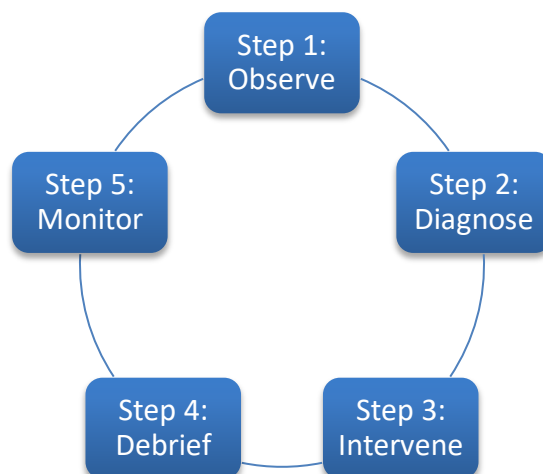
Developmental

Some coaching is aimed at helping the individual achieve mastery (i.e., the coachee does the leadership practice well and is ready to become expert).

Basic elements of coaching are the same (i.e., motivational, strategic, and informational), but coaching strategies may differ (e.g., consult by asking reflective questions to develop mastery vs. consult by providing expert feedback to illustrate errors in how they are thinking about the task).

How Coaching Works – the 5 Step Process

Coaching requires learning how to use four methods to implement 5 steps. The four methods are : asking questions, listening (head and heart), supporting, and challenging. These are the 5 steps.



1. Observe: What do I see and hear?

Listen very carefully, observe body language, and ask very focused probing questions to satisfy yourself that you “get” the problem. It may take time to get the facts straight. But if you don’t get the problem, you can’t help solve it. Don’t be shy about asking specific “stubborn” questions. This process can help the coachee articulate just what the problem is in a way they may not have before. So it’s not only “getting information.”

2. Diagnose: Why is the problem?

Getting the diagnosis right really matters. For example, if an organizer is struggling with strategy and you focus on getting them to try harder the result will only be frustration.

*Is the challenge **motivational** (effort/heart)?*

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

*Is the challenge **educational** (information/skills/hands)?*

Is the individual struggling because he lacks the skill to execute effectively? Does he not know how to do it? Is she 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?

*Is the challenge **strategic** (strategy/head)?*

Is the individual struggling because s/he doesn’t know how to use the information or skills that she does have. Does he understand the concepts or underlying principles clearly? Has he not thought it through carefully? Are the goals not achievable? Does the strategy make sense?

3. Intervene – What do I do?

Once you think you’ve figured out what the problem is don’t just tell the coachee what you think he should do! Find out what she thinks she should do? Ask questions that enable the coachee to see the problem, and for you

to see how the coachee sees the problem, and discern a way to solve it. Get the coachee's views out on the table. The appropriate intervention depends on the diagnosis.

If the challenge is **motivational**, you can:

- Encourage and exhort—you can do it!
- Offer a kick in the pants (with love)
- Help the person confront his or her fear, embarrassment, or other emotion that may get in the way of their ability to risk acting, persevering, trying new things. Communicate with empathy, hope, and affirmation of the coachee's self-worth. Reward and praise courage
- Model courage and emotional maturity in your own behavior confess fear and explain how you move toward it rather than away from it.

If the challenge is **educational**, you can:

- Model the behavior and invite the coachee to imitate you to get the “feel” of the activity
- Break it down into small parts and invite the individual to try one at a time
- Offer three or four different practice exercises and observe which ones “take” for that person.
- Suggest others with whom the person can practice.
- Suggest ways to figure out where to find the missing information.

If the challenge is **strategic**, you can

- Work through a specific example with the person, asking questions to guide the strategic process. Then reflect on the process itself, asking them to describe how it worked?
- Ask questions about how the individual is thinking about the practice (“Why did you choose that tactic?”)
- Offer your observations, asking how the person might think about it differently (“At that point, were there other options? What might they have been? Why did you choose the one you did?”)
- Offer feedback on what you are hearing, asking if that describes the situation, at the same time, offering possible reframing of it.
- Use silent reflection and self-diagnosis (“Why don't you take a moment to think through what you believe is working and not working and let's talk about that?”).

4. Debrief: What did the “coachee” learn?

Ask your coachee to summarize his or her “take away” from the session, commit to next steps, and decide when you will check back in. What went well? What are you challenged by? What are some possible solutions? What are your goals/next steps?

5. Monitor: How can I continue to support the coachee?

- Schedule periodic check-ins to support your coachee in integrating this new or revised solution into their regular practice.
- Find out from the coachee how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

Effective coaching is	Effective coaching is not
Showing up and being present to another person's experience and listening, with both	Being so prepared that you work out all the answers for the coachee before you even hear

your head and heart	or observe their challenges
Helping the coachee explore and make sense of their challenges and successes, and what they learned from it all	False praising of the coachee or only focusing on their strengths because you do not want to hurt their feelings
Helping the coachee to find solutions to challenges	Solely criticizing the coachee
Asking questions that both support and challenge the person you are coaching	Telling the coachee what to do

More on Coaching

How do I prioritize who to coach in organizing?

When you have several individuals or teams to coach, where do you start? Where do you put most of your energy to get the best outcomes?



Invest your first coaching effort in those who are doing the best work. This seems counterintuitive, but the purpose of coaching is not just to fix problems – it’s to help people achieve excellent outcomes.

Coaching your most innovative, productive people first maximizes their productivity, and preps you to coach others by giving you a detailed understanding of what excellent work looks like in practice. And **if your best folks get even better, they can help you coach and support their peers.**

Next, coach those who are showing promise. With what you’ve learned from the strongest groups, move on to those who are doing good work and help them make the leap to great. Utilize the tips in the 5 Step Coaching Process section for choosing interventions to help you tailor your coaching.

Finally, focus on the individuals and teams who are struggling. Watch these folks in action before jumping to conclusions. Are they struggling because of contextual factors, like a lack of resources, or

because of inadequate skill or effort? Try investing a little more (resources, training or support), and see if outcomes improve. If so, great, keep coaching! If not, then assess whether this person is in the right role. Whether you're coaching staff or volunteers, making sure the right people are in the right roles based on their skill and passion is a basic form of respect. While it's painful for all involved in the short term, helping someone move on from a role that's not well suited for them will only help everyone in the long term.

Be careful to set boundaries on your coaching with those who are struggling the most so that you continue to spend time and energy to keep your excellent folks going strong, and your good folks getting better.

How do I coach people to learn from failure?

In her book, *Mindset*, Carol Dweck argues that we all tend toward one of two mindsets: fixed or growth. The fixed mindset claims we're born with our basic qualities, like intelligence or talent, which can't improve or change (so why try?). Ever heard someone give a poor presentation, then say, "I'm not a good public speaker"? That's a mindset.

The growth mindset asserts that we can develop our abilities through dedication and hard work. Our job as coaches is to cultivate a growth mindset in those we're coaching. That requires learning to look directly at failure and understand it so we can improve.

Here are some tips for learning from failure, while striving for success:

Create a culture of debriefing. Before work begins, schedule time to debrief into every step. Make time after every event or project to evaluate what worked, what didn't, and articulate key learnings together. Require short written reflection on major projects, especially those that fall short.

Differentiate between actions and context. It's easy to hold someone responsible for every outcome. But success and failure are a combination of individual actions and situational context. As you develop a learning relationship with the person you're coaching, pay close attention to the details. When does one action lead to success? Under what conditions does the same action lead to failure? Success requires constantly evaluating the context and adapting our behavior to maximize good outcomes.

Interpret what happened. Coach the person you're working with to interpret failure with clear eyes. Hiding failure or pretending it was success doesn't fool anyone. Show those you coach that interpreting failure is an integral part of winning. Check out [Barack Obama's speech after his New Hampshire primary loss](http://www.youtube.com/watch?v=Fe751kMBwms) for a great example of interpreting failure in a way that stays focused on driving for success (<http://www.youtube.com/watch?v=Fe751kMBwms>).

Get back out there! Who wants to wallow in failure? Encourage those you coach to get out there and try again!



fixed



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COACHING CONCEPTS

The Art of Questioning: Coaching's Superpower

In this article, we'll explore how effective questioning creates insight, the traps that coaches can fall into, and how to use questioning with confidence, whether you're an executive coach, a team leader, or someone building a coaching culture within your organisation.

Questions may be described as the *precision tools* in the coach's toolbox. When used well, they help people think more clearly, view situations from new perspectives, and deepen their self-awareness. But there's more to questioning than simply being curious or asking whatever comes to mind. Questioning is a tool that unlocks insight, deepens awareness, and ultimately leads to real change.

It's easy to assume that good questions come naturally, or that curiosity is enough. But in coaching, the quality of the question shapes the quality of the answer. Too many managers (and even trained coaches) slip into advice-giving or solution-sharing, when what's really needed is a well-placed pause and a powerful question.

A well-placed question can create a moment of pause – a chance for someone to hear their own thinking in a new way. It can provoke reflection, deepen awareness, and illuminate a path forward. In contrast, poorly timed or poorly framed questions can confuse, intimidate, or shut down thinking altogether. The difference lies in intention and technique.

Coaching is, at heart, a thinking partnership – one that hinges not on having the right answers, but on asking the right questions. Yet, despite its power, questioning remains underused, particularly among time-pressured leaders, who may default to telling, advising, or problem-solving.

What makes a great question?

A good coaching question is:

- Open-ended: beginning with 'what', 'how', or 'where', rather than 'why' or anything that leads to a yes/no answer.
- Succinct: a great question is often fewer than ten words.
- Free of judgement: even subtle implication can close someone down.
- Focused on the coachee's thinking: not the coach's ideas or advice.

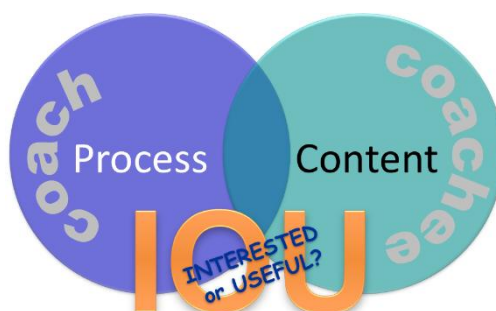
Some of the most powerful questions are deceptively simple:

- *What does success look like?*
- *What's really going on for you?*
- *What's the most important thing to focus on right now?*
- *And what else?*

These questions aren't formulaic prompts. They are genuine invitations for self-discovery. Often, the silence that follows a good question is where the work gets done.

Even experienced coaches and managers can fall into subtle traps. Among the most common are:

- Leading questions: These suggest an answer, even if unintentionally. For example, asking, "How can you be more confident?" presumes that confidence is the issue. A cleaner alternative might be, "What's happening for you in those moments?" or simply repeating the coachee's words back.
- Judgemental 'why' questions: While not inherently wrong, 'why' questions can sound accusatory and put people on the defensive—e.g., "Why did you do that?" Better to use, "What led you to that decision?" or "What were you hoping would happen?"
- Multiple questions: Asking several questions at once can overwhelm and confuse. It's usually a sign the coach is thinking aloud. Instead, ask one question. Pause. Wait.
- Needing a quick solution: One of the most subtle yet damaging pitfalls is when a coach feels a need for the coachee to find an answer. This places unspoken pressure on both parties and can close down exploratory thinking. The coach's job is to hold the process, not rush the content. Coaches must remain neutral, staying in their own territory (the **process**), rather than crossing into the coachee's (the **content**).



A good check for the coach or manager to ask here is, am I asking this question because I am interested or because it is useful?

- Talking too soon: Coaches often feel compelled to fill silences, but silence is where thinking deepens. If unsure, simply ask, “Would you like a moment to think, or shall I ask another question?”

When (and how) to offer advice or insights

While the gold standard in coaching is to ask rather than tell, there are appropriate times to offer insights, suggestions, or even advice, particularly when you bring relevant expertise or experience.

However, timing and permission are key. A good approach is to ask, “Would you be open to an observation?” or “May I share a thought?” This respects the coachee’s autonomy and keeps the conversation collaborative, rather than directive.

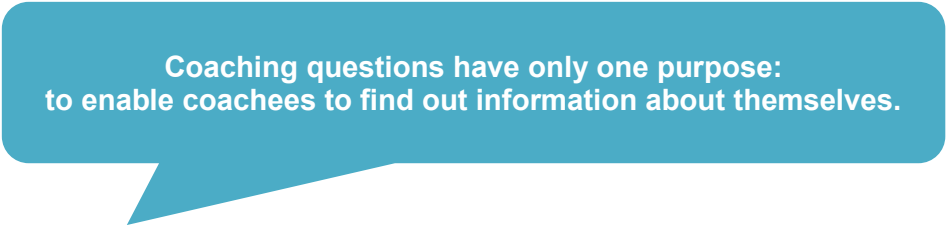
Suggestions should be framed as options, not prescriptions. For instance, “One thing that’s worked for others is xxx – how might that land with you?” This invites consideration rather than compliance.

Coaching versus directing: the leadership balance

Managers often struggle with the balance between being a coach and being a leader. In high-pressure situations, decisiveness is necessary. There are times when a manager needs to give direction, not ask questions. The key is clarity.

When coaching, the leader supports the other’s thinking. When directing, they take ownership of the decision. What matters is not staying in one mode, but switching appropriately, and making that switch transparent. Phrases like, “Let me take off my coaching hat for a moment...” can help signal the change. It helps to explain clearly why it is necessary for the leader to make the decision in this instance.

Ultimately, what makes a question ‘coaching’ is not the wording, but the mindset: respect, a belief in the coachee’s capacity to think for themselves, and 100% focus on the coachee’s agenda.



**Coaching questions have only one purpose:
to enable coachees to find out information about themselves.**

Why it matters now

In fast-moving environments, there’s pressure to be efficient, to provide answers, and to lead from the front. But leadership today demands something different. It demands the kind of thinking partnership that coaching provides: a place where people can hear themselves

think, in the presence of someone who knows how to listen—and how to ask the right question at the right time.

Go deeper with my book “[Performance Coaching](https://www.coachingcultureatwork.com)” or train with us individually or inhouse at www.coachingcultureatwork.com.

About the author



International speaker, journalist and author, Carol Wilson, is Managing Director of Culture at Work and a Fellow of the Institute of Leadership & Management, the Professional Speaking Association and the Association for Coaching, where she is a member of the Global Advisory Panel. A cross-cultural expert, she designs and delivers programmes to facilitate change management and create coaching cultures for corporate and public sector organisations worldwide, and has won awards for coaching and writing. She is the author of ‘*Performance Coaching: A Complete Guide to Best Practice Coaching and Training*’, now in its third edition and featuring Forewords by Sir Richard Branson and Sir John Whitmore, and ‘*The Work and Life of David Grove: Clean Language and Emergent Knowledge*’. She has contributed to six other books and published over 70 articles including a monthly column in Training Journal.

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UNPACKING POWERFUL QUESTIONS



Healing Centered Coaches use Powerful Questions to support clients to remain in the “driver’s seat” while simultaneously encouraging them to heal and grow. Using big open-ended questions that invite possibility, coaches support clients to tap into their lived experiences and inner wisdom as guides to ground as they move forward.

Fast Facts About Powerful Questions

- Open-Ended
- What or How (Starters)
- Invite Possibility
- 5 to 7 Words Max
- Support Curiosity
- Taps into Client’s Wisdom

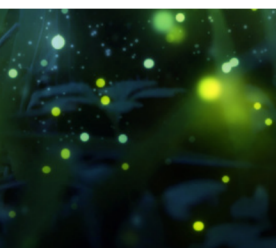
Strong powerful question prompts typically start with **WHAT** or **HOW**. These prompts provide an opportunity for clients to respond using their experiences and problem-solving abilities to sit in the “driver’s seat” and to lead the direction of the coaching session.

Intermediate question prompts such as **WHO**, **WHEN** and **WHERE** provide an opportunity for coaches to temporarily lead the session by assisting clients to uncover blind spots and move through difficult situations. These prompts should be minimized during the coaching session as they have been found to tempt coaches to begin leading the conversation and in turn begin problem-solving for the client. It also leans into more of a case management or therapeutic approach.

WHY questions should generally be avoided by coaches because they can be seen as judgmental to clients and thus may cut off clients' motivation to actively engage during the coaching session.

Coaching Tips:

- Ask questions that reveal the information needed for maximum benefit to the coaching relationship and the client.
- Ask questions that reflect active engaged listening and an understanding of the client’s perspective.
- Ask questions that evoke discovery, insight, commitment, or action (e.g., those that challenge the client’s assumptions).
- Ask open-ended questions that create greater clarity, possibility, or new learning.
- Ask questions that move the client toward what they desire, not questions that ask for the client to justify or look backward.



50 POWERFUL QUESTIONS

1. What do you want coaching on?
2. What's most important about what you just shared?
3. What do you want to accomplish?
4. What's the most effective thing for me to focus on?
5. What's the goal? ... What are the goals?
6. What would success look like?
7. What do you need to be successful?
8. What's holding you back?
9. What do you want to say?
10. What can you teach to someone else about this situation?
11. What do you want to do?
12. What's best for you?
13. What have you learned?
14. What's the concern?
15. What's wearing you down?
16. What's lifting you up?
17. What makes now the right time?
18. How are you making time for yourself?
19. What's driving this? Is it push, pull or indifference?
20. How are you your own worst enemy?
21. What's the advice you would give yourself?
22. What do you want to do more of each day?
23. What do you want to spend less time on?
24. What's the easiest thing to do?
25. How are you creating the results you want?
26. What would make it worth the effort?
27. What's next?
28. What do you want to experience more of?
29. What is the benefit of not changing? ... What are you trading it for?
30. What did you learn that you can use next time?
31. What would you do differently next time around?
32. How are you innovative?
33. What are your top 3 strengths?
34. What do you want your life to be about?
35. How do you want to live in the future and what experiences do you want to create?
36. How are you giving your power away?
37. What would it look like if you were giving your best where you have your best to give?
38. What's the one quality about yourself that you truly enjoy?
39. What's right with this scenario? (if you always ask, "What's wrong with this scenario?," this is a nice switch)
40. What can you be the best at in the world?
41. What are you spending the bulk of your time on?
42. How does your schedule reflect your values?
43. If you had all the time in the world, how would you spend your time?
44. If you had all the money in the world, how would you spend it?
45. What would make life more wonderful for you?
46. What's been your contribution?
47. What would you like to have happen?
48. How have you grown?
49. What are you seeing that I'm not?
50. What would encourage you to achieve?



ADDITIONAL CRITERIA FOR POWERFUL QUESTIONS...

Powerful Questions:

- Lead to clarification
- Call for introspection
- Connect to the person's needs and desires
- Consider a new perspective
- Help the person see the issue in a different light
- Move into depth or new territory
- Bring light to inner conflict
- Get to the root of a belief or pattern
- Help people face fear and learn from it
- Ask something new
- Create specific engagement
- Invite deep reaction
- Generate movement



General Coaching Sentence Stems

Active Listening Stems	Nonjudgmental Responses
• So... • In other words... • What I'm hearing, then... Is that correct? • What I hear you saying is... Am I missing anything? • I'm hearing many things... • As I listen to you, I'm hearing... Is there anything else you feel I should know?	• I noticed how when you...the students really... (to identify something that worked and why it worked) • I'm interested in learning (or hearing) more about... • I'd love to hear more about... • Thank you for sharing your thoughts. Can you tell me more about...?
Clarifying Stems	Probing Stems
• Let me see if I understand... • I'd be interested in hearing more about... • It would help me understand if you'd give me an example of... • So, are you saying/suggesting...? • Tell me what you mean when you... • Tell me how that idea is like (or different from)... • To what extent is...? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...	• What's another way you might...? • What would it look like if...? • What do you think would happen if...? • How was...different from (or similar to)...? • What's another way you might...? • What sort of an impact do you think...? • What criteria do you use to...? • When have you done something like...before? • What do you think...? • How did you decide...(come to that conclusion?)? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...

Facilitative & Directive Coaching Stems*

FACILITATIVE	DIRECTIVE
Cathartic Stems - I'm noticing that you're experiencing some feelings. Would it be OK to explore those for a few minutes? - What's coming up for you right now? Would you like to talk about your feelings? - Wow. I imagine I'd have some emotions if that happened to me. Are you experiencing strong feelings?	Informative Stems - There's a useful book on that topic by... - An effective strategy to teach ____ is... - You can contact ____ in ____ department for that resource... - Your principal will be in touch about that. ____ is very effective at teaching that skill; maybe you could observe him.
Catalytic Stems - Tell me about a previous time when you... How did you deal with that? - I hear you're really struggling with... How do you intend to start? - It sounds like you're unsatisfied with... What would you do differently next time? - You've just talked about five different things you want to work on this week. The last thing you mentioned is... How important is this to you? - How do you want your students (or a particular student) to remember you? - How do you want to remember this time or situation in fifteen years? - Who do you want to be in this situation?	Prescriptive Stems - I would like you to discuss this issue with your supervisor. - You need to know that the school's policy is... - Have you talked to ____ about that yet? Last week you said you planned on doing so. - Would it be ok if I share some advice that I think might help you? You're welcome to take it or leave it, of course. - I'd like to suggest...
Supportive Stems - I noticed how when you...the students really... (To identify something that worked and why it worked) - It sounds like you have a number of ideas to try out! It'll be exciting to see which works best for you! - What did you do to make the lesson so successful? - I'm interested in learning (or hearing) more about... - Your commitment is really inspiring to me. - It sounds like you handled that in a very confident way. - You did a great job when you... - I'm confident that you'll be successful.	Confrontational (Interrupting) Stems - Would you be willing to explore your reasoning (or assumptions) about this? - I'd like to ask you about... Is that okay? - What's another way you might...? - What would it look like if...? Is there any other way to see this situation? - What do you think would happen if...? - What sort of an effect do you think...would have? - I'm noticing (some aspect of your behavior)...What do you think is going on? - What criteria do you use to...? - Who do you want to be in this situation? How do you want to show up? - How do you want others to see you in this situation?

* The labels for these categories—cathartic, catalytic, supportive, informative, directive, confrontational—are from the work of John Heron.



Diagnosing Head, Heart, or Hands in Coaching

1. Ms. Alvarez – Asking a Colleague to Join the Union

Ms. Alvarez believes strongly that educators need collective power to address stagnant pay. She agrees to ask newer teachers to join the union but keeps postponing the conversations. When she finally brings it up, she rushes through it and quickly changes the subject. In coaching, she admits she's afraid colleagues will see her as "political" or confrontational. She understands the benefits of membership and knows the talking points, yet she avoids deeper follow-up conversations that might actually move someone to join.

2. Mr. Greene – Organizing Around Pay Inequity

Mr. Greene is outraged after discovering inconsistencies in how stipends are distributed. He immediately urges staff to demand a 15% across-the-board raise and circulate a petition within a week. However, he hasn't researched district budget constraints, mapped decision-makers, or clarified whether inequity stems from policy or implementation. Colleagues hesitate because the plan feels reactive and disconnected from how decisions are actually made.

3. Ms. Okafor – Encouraging Colleagues to Vote in a School Board Election

Ms. Okafor wants staff to turn out for a school board election that could impact contract negotiations. She sends long emails filled with policy details and links to candidate platforms. Few colleagues respond. When she talks in person, she overwhelms them with information rather than asking what issues matter most to them. She leaves conversations feeling frustrated that people "just don't get it," even though she hasn't created space for dialogue.

4. Coach Rivera – Inviting a Colleague to the Picket Line

During a contract dispute, Coach Rivera commits to asking teammates to join the picket line. After one colleague says, "I can't risk admin noticing," he stops asking others. He decides people probably aren't interested and shifts his energy elsewhere. In coaching, he shares that he doesn't want to strain friendships or make anyone uncomfortable, especially if they disagree.

5. Dr. Shah – Considering a Run for Union Office

Dr. Shah is frustrated by a lack of transparency in leadership and wants to run for union vice president. She announces her candidacy but hasn't clarified her platform beyond saying, "We deserve better." Potential supporters ask what specific changes she would pursue and how she would build majority support. Conversations stall because colleagues aren't sure what she's actually proposing or how it would realistically succeed.

6. Mr. Lawson – Addressing Workplace Fairness

Mr. Lawson wants to confront inconsistent enforcement of evaluation policies that seem to target newer teachers. In staff meetings, he raises the issue bluntly, citing policy language and naming administrators directly. While his concerns are valid, colleagues grow uncomfortable and disengage. Some privately agree with him but say they don't feel invited into the conversation. He leaves meetings feeling isolated and confused about why others won't stand with him.



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.

Building Relationships through One on One Organizing Conversations

- LAVA: Listen, Agitate, Vision, Ask
- [AHUY](#): Anger, Hope, Urgency, You
- [Feel, Felt, Found](#)
- [AAR](#): Affirm, Answer, Redirect

LAVA

LISTEN:

- Introduction
- Ask Questions! Get to their Issue
 - Listening is one of the most important parts of any organizing conversation. Listening is how you find out their issues and identify what's going to motivate the person to get involved.
 - In the best organizing conversations, you do 25% of the talking and 75%
 - Ask them concrete questions about their experience at the school
 - Ask followup questions to identify their issues and agitate them. Feel free to share a bit about your own experiences. Remember, developing a relationship is about developing trust.
- Find out what they care about, what their issues are.
- Some techniques of a strong listener are:
 - Paraphrasing
 - Summarizing
 - Acknowledging
 - Encouraging
 - Supporting
 - Delegating
 - Followup Questions
 - Listen for feelings
 - Open body language

AGITATE:

- Make them see that they aren't alone and people are coming together so the decisionmaker will listen.
- Keep the conversation flowing.
- Make links between the organizing vision and their own personal or community experience.
- Use your personality; people get involved because they like you
Be genuine. Don't argue.

VISION:

- Offer a vision of what we can achieve when we come together.
- Share a vision of the plan and lift up core strategies to achieve change.
- [Work with leaders to develop key messages about the campaign's vision]

ASK:

- Make a Clear Ask: Communicate exactly what you would like them to do
- Don't apologize: Asking people to do things may go against some of our instincts.
Sometimes we try and cover it up by using apologetic language
- Use firm language: Avoid saying "try"

AHUY: DEVELOPING A RAP

The acronym "AHUY" is a helpful shorthand for what it takes to move someone to act: Anger, Hope, Urgency, and You.

1. **Opening:** Introduce yourself and ask a question to get the other person talking about a workplace issue. How will you strike up the conversation?
2. **Anger:** "There is an injustice. We have to fix this." Tap into righteous anger at the injustice and create determination to do something about it. What questions will you ask to learn how the issue affects this person?
3. **Hope:** "Change is possible. We can fix this. Here's our plan." Inspire hope by conveying a clear, credible, worthwhile plan and sharing why you feel hopeful. What are the steps we need to take together?
4. **Urgency:** "Now is the time. We can't wait any longer." What will happen if you don't act?

5. **You:** “You can make a difference. Your participation matters.” Why is this person’s support critical? What concrete action are you asking them to take?

Feel, Felt, Found

Feel, Felt, Found model is a way to challenge people into action that draws from some of the best practices of good organizing conversations.

I understand, you FEEL like _____...

Show that you are listening to them. Let them know that you aren’t dismissing their concern.

I FELT the same way when...

Validate their concern and that they are not alone.

Tell a story. What similar experience have you had (or seen others work through)?

Try to say the feeling that they might not be directly saying

...but by getting involved, I FOUND that _____.

Instead of telling them they are wrong for having concerns: Why should they get involved despite the objection? What have you experienced by getting involved?

AAR

Affirm. Agree that their concern is valid- you may not understand why this is a concern for them but it’s important to affirm/ respect that, for them, this is real.

Answer. Explain how organizing together can help with such concerns. This is where your knowledge as an organizer can be very powerful.

Redirect. Refer back to their issues and challenge them to organize with others to make changes. Like we discussed earlier, when we’re dealing with a strong emotion like fear, we need to draw out emotions just as strong to combat it. Remind the person why organizing makes sense based on what they told you their issues were. Inspire enough anger and/ or hope to move past their tough questions/ reservations.

Centering Equity in your Campaigns

What does it mean to center equity in your campaign?

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

To engage in a systems analysis of a racial issue and develop solutions or to test if the campaign demands center race, class, and gender justice, good discussion questions to have with partners and union members include:	
Problems: What inequities are you noticing or experiencing? What are the impacts on different groups? Who benefits most and who is hurt most?	
Causes: What institutions, policies, or practices are causing or contributing to the inequities? What social norms, popular myths, or cultural biases may be contributing?	
History: How did things get this way and are things worsening or improving?	
Solutions: What solutions could address the root causes and eliminate the inequities? How would different racial groups be impacted by the proposed solutions?	
Strategies: What strategies and actions could be used to advance the solutions?	
Leadership: Who are the stakeholders most affected by the inequities? Are they involved in naming the issues and solutions? What kinds of active leadership roles could they take to advance the proposed solution?	
Additional Equity Tool Questions: Who is most directly impacted? Who has been left out? How can they be directly engaged? How do our demands center race, class, and gender justice?	

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

NATIONAL EDUCATION ASSOCIATION

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

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

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FOREWORD

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

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

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

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

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

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

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

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



Rebecca S. Pringle

President

National Education Association

PURPOSE OF THE RESOURCE GUIDE



INTRODUCTION TO RACIAL JUSTICE CENTERED EDUCATION

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

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

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

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

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

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

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

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

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



SECTION 1: PRINCIPLES AND VALUES

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

Takeaways:

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

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

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

Takeaways:

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

SECTION 3: SUCCESS STORIES

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

Takeaways:

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

SECTION 4: RESOURCES

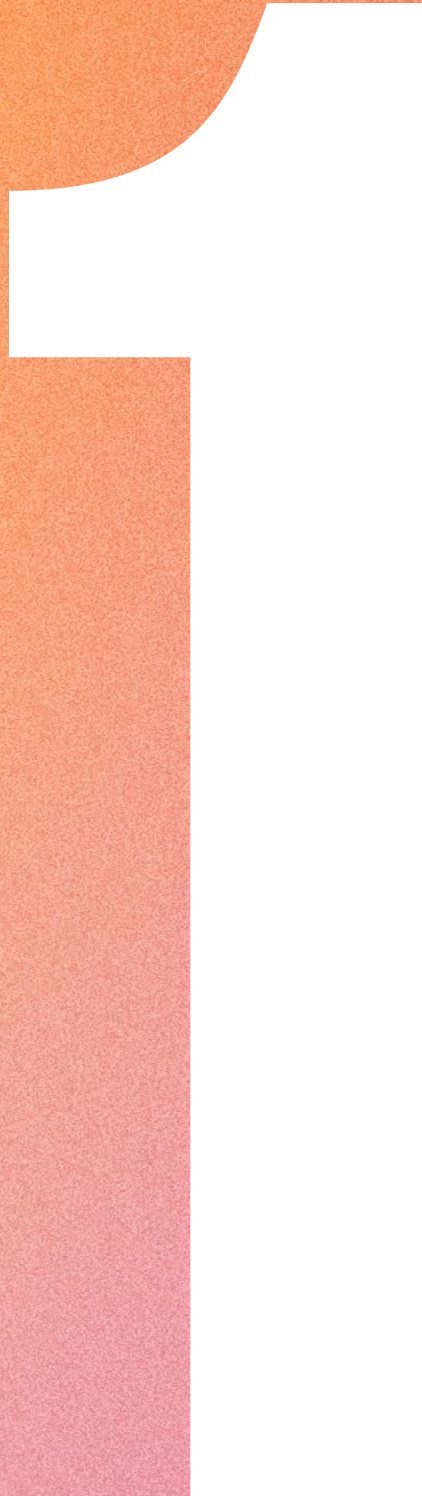
Shares links to tools and resources provided in Sections 1-3.

Takeaways:

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



PRINCIPLES AND VALUES



BARGAINING FOR THE COMMON GOOD

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

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

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

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

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

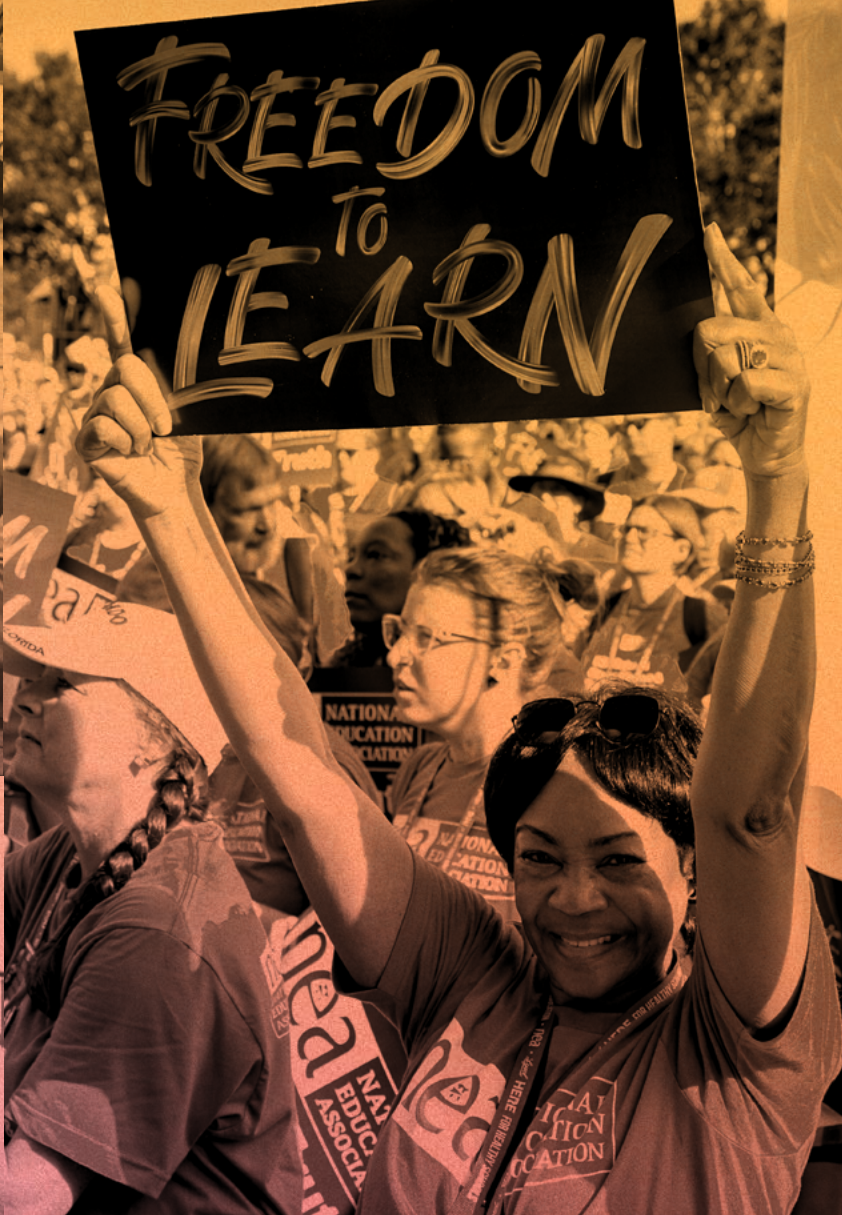
- Less testing
- Smaller class sizes
- Educator recruitment and retention programs
- Equitable school discipline policies
- Mental health support
- More nurses and counselors
- No ICE (Immigration and Customs Enforcement) collaborations
- Implementation of restorative justice
- End random backpack checks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

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



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

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



RACIAL JUSTICE IN EDUCATION FRAMEWORK PRINCIPLES

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

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

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

CONNECTING FRAMEWORK ELEMENTS

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

It will require that:

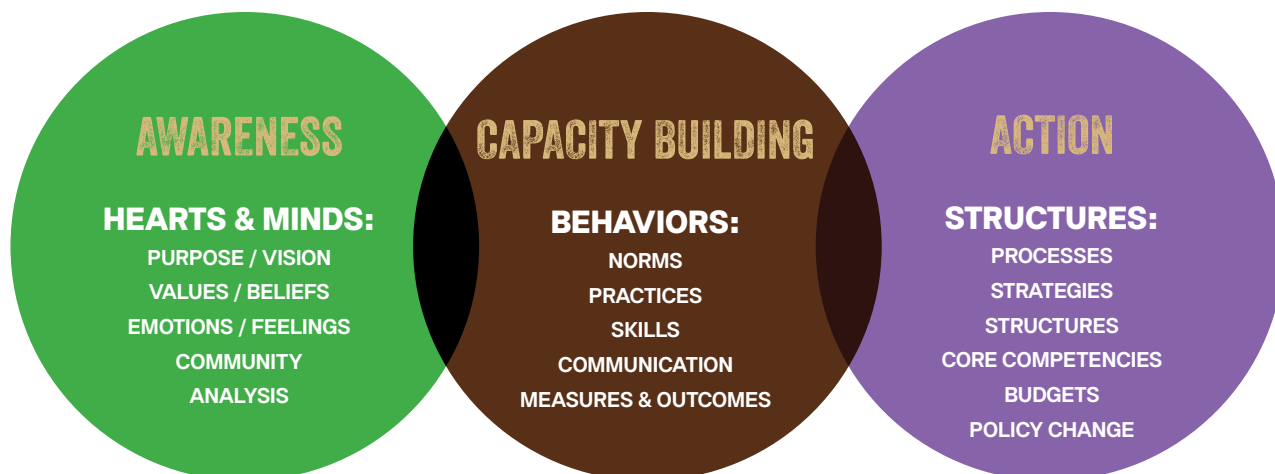
- We have a deep understanding of racial history and the associated trauma and are able to acknowledge the presence of this trauma within current systems, norms, practices, and policies.
- We focus on solutions that will build power (e.g., political, economic, civic, community) for the most sharply impacted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

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

AWARENESS

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

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



CAPACITY BUILDING

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

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

ACTION

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

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

SECTION 1: PRINCIPLES AND VALUES

TAKEAWAYS:

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

ELEMENTS OF BARGAINING FOR THE COMMON GOOD

2

CENTER RACIAL JUSTICE IN YOUR DEMANDS

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

What does it mean to center racial justice demands?

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



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

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

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



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

RACIAL EQUITY IMPACT ASSESSMENT:

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

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

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

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

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

BARGAINING FOR THE COMMON GOOD DEMANDS:

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

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

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

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

BUILDING YOUR RACIAL JUSTICE TEAM:

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

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

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

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

CENTERING LEADERSHIP OF NATIVE PEOPLE AND PEOPLE OF COLOR:

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

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

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



BUILDING LONG-TERM COMMUNITY-LABOR POWER TAKES TIME.

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

COMMUNITY BUILDING IS THE FIRST STEP:

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

BASIC STEPS TO A BARGAINING FOR THE COMMON GOOD CAMPAIGN:

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

BARGAINING FOR THE COMMON GOOD ASSESSMENT TOOL:

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

COMMUNITY MAPPING:

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

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



Listening Sessions and Community Building



Developing Demands and Identifying Research Needs



Developing Strategy, Budgets and Identifying Staffing needs



Launch Campaign



Escalation, Organizing and Developing Leaders



Negotiation, Organizing and Developing Leaders



Post Campaign Organizing and Developing Leaders

This process can be 6-9 months or longer

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

COMMUNITY LISTENING TOURS:

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

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

ENGAGING COMMUNITY LEADERS AND RANK AND FILE MEMBERS:

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

CREATING A SHARED VISION:

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

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

<https://vimeo.com/319978916>

DEVELOPING A JOINT STRATEGY:

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

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

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

DEVELOPING AN ORGANIZING PLAN:

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

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

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

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

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

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

Possible actions may include:

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

IDENTIFYING CLEAR ASKS:

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

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

1. Affirm:

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

2. Answer:

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

3. Re-direct:

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

EXPAND THE SCOPE OF BARGAINING BEYOND WAGES AND BENEFITS:

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

DEVELOP AND DEEPEN LEADERS' SHARED POLITICAL ANALYSIS:

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

Political education should:

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

EXPOSE THE BAD ACTORS:

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

DO THE RESEARCH:

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

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

source:

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

source:

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

TARGET THE POWER BROKER:

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

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

POWER MAPPING:

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



GENERATE PUBLIC SUPPORT:

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

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

STRENGTHEN INTERNAL ORGANIZING, MEMBERSHIP, AND MEMBER ENGAGEMENT:

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

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

CONTRACT ACTION TEAM (CAT):

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

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

STEWARD/MOBILIZER:

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

1-ON-1 ORGANIZING MEETINGS:

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

10-MINUTE MEETINGS:

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

GROUP TEXTS:

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

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

WEBSITE/ONLINE RESOURCE:

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

SOCIAL MEDIA:

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

Tools and Materials:

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

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

TAKEAWAYS:

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



SUCCESS STORIES

3

SUCCESS STORIES

Columbus, Ohio

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

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

Jefferson County, Colorado

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

Source: https://cdnsm5-ss12.sharpschool.com/UserFiles/Servers/Server_627881/File/Print%20Agreement%20JCEA%20Final%2007.2023%20Website.pdf

Minneapolis, Minnesota

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

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

St. Paul, Minnesota

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

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

Seattle, Washington

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

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

Sacramento, California

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

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

San Diego, California

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

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



SECTION 3: SUCCESS STORIES

TAKEAWAYS:

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

RESOURCES

4

RESOURCES

ASSESSMENT TOOL FOR RACIAL EQUITY:

Provides discussion questions to have with partners and union members.

RACIAL EQUITY IMPACT ASSESSMENT:

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

BARGAINING FOR THE COMMON GOOD DEMANDS:

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

RACIAL JUSTICE DEMANDS:

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

BASIC STEPS TO A BARGAINING FOR THE COMMON GOOD CAMPAIGN:

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

BARGAINING FOR THE COMMON GOOD ASSESSMENT TOOL:

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

COMMUNITY MAPPING:

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

COMMUNITY LISTENING SESSION:

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

COMMUNITY SURVEY - FAMILY VERSION:

Survey for families and parents about their interests and concerns.

COMMUNITY SURVEY - COMMUNITY VERSION:

Survey for community members about their issues and concerns.

FIX L.A. COMMUNITY SURVEY:

Sample survey to gather information about the community.

PARENT INTERVIEWING:

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

PARENT (AND SMALL BUSINESS) ORGANIZING CONVERSATION - GUIDE:

Sample conversation with questions to engage parents and small businesses.

LOCAL CAMPAIGN PLAN:

A comprehensive campaign planning tool for locals and partners.

COLORADO EDUCATION ASSOCIATION POWER MAPPING ACTIVITY:

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

POWER MAPPING TOOL:

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

MESSAGING AND MEDIA RELATIONS TOOLKIT:

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

DIGITAL BEST PRACTICES:

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

NEA GUIDE TO TRANSFORMATIONAL

ORGANIZING CONVERSATIONS:

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

SAMPLE 10-MINUTE MEETING AGENDA:

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

BUILD THE CAT STRUCTURE:

Internal union network of member activists.

SECTION 4: RESOURCES**TAKEAWAYS:**

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



GLOSSARY OF TERMS

Glossary of racial justice language

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



Ten Tips for Talking About Race

1. Normalize discussing race. Use the terms. Reference the ideas. The more you do so, the less uncomfortable it will feel to talk about race.
2. Find multiple entry points. Look for places where others will be somewhat willing to enter, where they have some skin in the game, and where they can see how they might personally benefit from the discussion. Remember that racism and white supremacy negatively affect everyone and consider how you might help them see that as well.
3. Be humble. You are also a work in progress, and you've made mistakes in the past. You've been on your own journey. At some point in the future, you'll hopefully look back and see how much you didn't know at this point. We're all on this journey together.
4. Know what you are talking about. Prepare, practice. Don't be sloppy.
5. Be clear: offer sharp and clear definitions. Don't throw around terms that someone else might not know—especially if you're throwing them as a way of leveraging power over someone. Check for understanding during the conversation—in a way that is not paternalistic.
6. Make a distinction between blame and responsibility. The way things are is not our fault, but it is our responsibility to clean up the mess we're in because many of us are benefiting from the privileges granted us because of our race, class, gender, sexual orientation, abilities and so on.
7. Be clear about purpose. Have conversations about race to help others grow and meet people's needs, to help others feel more whole, and to help our world heal—not so that you can feel righteous and powerful.
8. Build relationship. Build trust. If your purpose is to help someone grow and gain insight, then the space in which that conversation happens needs to be *safe-enough*. We don't aim for a "safe space"—that's a subjective evaluation around which there'll be disagreement. The purported lack of a "safe space" is also often used as an excuse for why we can't have conversations about race. Safe-enough doesn't mean comfortable.
9. Invite, accept and acknowledge emotions—your own and those of other. There's no way we can (or should) have conversations about race without having any emotions. Emotions can be our partners, a resource, and our teachers. Tears are not the problem—it's how we respond to those tears that can be an issue. But remember: Systems of oppression don't want you to have emotions, so if you reclaim and accept them, you're actively rebuking these systems.
10. Ask for feedback on any conversations that you facilitate around race, reflect on your facilitation and leadership, own any messy moments that you are responsible for, and commit to the process.

TRAINING FOR CHANGE

Sample Questions for Campaign Coaching

Asking the right question can move mountains on a coaching call. Crafting great coaching questions takes practice, but it's a skill any coach can learn. It's often helpful to prepare questions in advance of a coaching session, especially when you anticipate emotional challenges or hard decisions coming up.

Effective questions are open-ended (not a 'yes-no' answer), answerable (not too complex or theoretical), and generate options, ideas, or insights of the organizer. And they avoid being 'advice with a question mark attached,' i.e. "You should do this tactic next, don't you think?"

Here are some example questions to use for your next coaching call. It's best to remix them for your particular context, and not to ask them all at once. For more background on the strategy concepts below, check out the [Campaign Strategy Workbook](#).

SUPPORT QUESTIONS

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, to pull it off?

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 here? What aspect might be harder to talk about, but is also there?
- Sounds like [this person] has been challenging. If there were a challenge *underneath* this one dynamic, that might be a bigger pattern or question for us, what would it be?
- We've covered the urgent 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 this campaign, 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?

TRAINING FOR CHANGE

- Which of these do we need to figure out before we can move on to the next step for our campaign?
- Which item do you feel most stressed about? Excited to dig in around?

STRATEGY QUESTIONS

Assessing Targets

- What does your target care about? What are their motivations? What do they rely on to sustain the status quo?
- What public statements have they made on our issue? What past behavior or actions have been consistent or inconsistent with these statements?
- How are similar campaigns approaching this issue elsewhere? Who are they targeting; what are they demanding, and how successful are they?
- What do their financial records tell you? E.g., donor rolls, tax information, annual reports, etc.
- What private statements or insider knowledge do you know or could you find out?
- How has your target 'felt the heat' from your organizing so far? How do you know? (If helpful, ask about what data they have, i.e. number of people at actions, number of emails/calls the target received about their demand, etc.)

Pillars of Support (Power Analysis)

- Which decision-makers could actually grant your demand(s)?
- Which people or institutions does your target count on to maintain the status quo? Who's support, participation, or endorsement is required? What key action (or inaction) is required by them?
- Who can directly influence them, and what evidence do you have of that?
- What else do they rely on or need, that you could put in jeopardy if you mobilize enough people power?

Spectrum of Support

- Which specific institutions, organizations with a constituency, or influential individuals do you need in order to win? Why are they important?
- Who is already sympathetic to your goals? How do you know? What actions could they take as a next step?
- Who is opposed to your goals? How do you know? What opposition could you 'expose,' to draw a contrast between your people/goals and theirs?

TRAINING FOR CHANGE

Tactic Escalation

- What are examples of public actions that have “broken through” with your targets or received the kind of attention you’re looking for?
- What else do we know about public actions that seem effective where you are?
- What actions have you seen in other places that might be ‘remixable’ for your context, to help pressure your target?
- What tactics have we seen that inspire you, that you would be excited to invite supporters to participate in?
- What are three tactics you can imagine sequencing together over 1-3 months, with the goal of demonstrating greater active support at each one over time to our targets, and greater willingness of supporters to take risks to participate?

Theory of Change

- What do you think it will take to win?
- Which specific constituencies, organizations, officials, individual “influencers” with followers do you think will have to publicly endorse your demands in order to win?
- How many people do you think you’ll need to recruit “off the fence” to participate in visible, active support roles for your targets to agree to your demands?
- When might your targets be most vulnerable to our public pressure?
- What might your active supporters have to be willing to do, in order to create enough pressure to move your target?

Critical Path Analysis

- If you think about your campaign as a series of dominoes lined up to fall in your direction, which dominoes would have to fall, in what order, before your targets agrees to your demand?
 - *These might be endorsements by key secondary targets, favorable coverage in the media, public polling data, a certain number of people recruited into active support roles, a certain number of people participating in an in-person mobilization, etc.*

Scenario 1—How do We Build a Winning Bargaining Strategy?

I am currently working on a campaign to recertify our bargaining rights. I am confident that we will win the recertification election; however, I am concerned that we will default to a service-model bargaining strategy on the other side of the recertification vote. In our union the dominant thinking among our leadership is “preserve the relationship with the district, don’t challenge them for power.” In this vein, there is talk of using Interest Based Bargaining approach and no plans to provide members with a path to participate in the bargaining campaign. The IBB model of bargaining is also being promoted by the the state affiliate staff assigned to our union. Similarly, the leadership believes that the path to membership growth is winning a good contract “to use as a selling point,” rather than moving members into action. I am struggling with how to agitate my leadership team towards a winning bargaining strategy that will deliver the strength and growth we want.

Scenario 2—Help- Our Campaign is stuck!

I am a local president that launched a campaign for a full cost of living raise plus a salary schedule step. Although we meet monthly with our superintendent our union has not really made a demand before. At our campaign kick-off we had more people attend the meeting than we have in years! We launched campaign commitment cards to all staff and 75% of total staff have signed on. We have also started wearing buttons with our campaign slogan on them. Our superintendent takes everything personally and reacts very emotionally to all of our union's public actions. At each monthly meeting I am attacked for something. The superintendent sends me accusatory emails that I am "making problems" and that's there's "no money for what I'm asking for." Even though I bring the VP of the union with me, the superintendent continuously attacks me as an individual employee. We have asked to present our campaign to the school board and the superintendent intercepted the message saying a public forum was not appropriate for this. We tried to invite the board members to a dialogue to explain our campaign and the superintendent made sure that also did not happen. The superintendent has frequently asked me, "Don't you trust me to relay information to the board?" The board president has stated that they prefer to follow the chain of command and not hear from the union directly. How do we move our demand forward when it feels like there's nowhere to go?

Scenario 3—We could NEVER be like them! (AKA Building Power from Scratch)

My union has a few dedicated long-time members but overall we have pretty low membership numbers. I have been the president for about ten years and work closely with our state affiliated staff person. Whenever I have a problem they are quick to call me back and they work closely with the superintendent or principal to solve the issue. We have a good relationship with the district. We mainly focus on representing people when they have a problem. We like to talk about our union as insurance. Remember, you can't buy insurance after the car accident! Recently I was on an NEA webinar and heard about teachers winning a strike in California and found out one of the things they were fighting for was input on class size. Even though we have a good relationship with the district we have not had conversations about things like that. I'd love for us to have that kind of power but feel like we don't have enough members to ever do that and we live in a very red area.

Problem Solving: From Good Service to Centering Worker Agency

Building an organizing culture requires centering worker agency throughout the work of the union (ownership), and identifying larger shared purposes to strive for (leadership). In your day to day work, union leadership and staff can easily become enmeshed in the numerous worker problems, grievances, and disciplinary matters that demand their attention. These demands can be overt (managers, local leaders, members) or covert (our own fear of letting someone down, our own belief that we are the expert that has to do it, pressure from the established culture).

Local Leaders and Staff need to build persistence to approach their problem solving with an organizing lens and a servicing plan. To build and support an organizing habit for yourself and an organizing culture with leaders, consider reframing your plans for problem solving with members using the following prompts that bring worker agency into the conversation:

1. What does the building rep think?
2. What are other people saying?
3. Who are the leaders in this building and are they aware of this?
4. How can you bring the members into this?
5. Who's the right person to go with the member to the principal?
6. What would it take for you not to be in that meeting?
7. How can this be a story about the members?
8. What new leaders are on your radar?
9. What's your plan for this member?
10. What's the membership plan at this school?

Even a simple question like “What does the building rep think?” can be a powerful shift in your thinking and planning if you are used to dealing primarily with individual members themselves. Over time, you will begin to automatically build in the step of connecting with building reps and soliciting their views into your advocacy plan as a basic expectation.

If you see yourself as an organizer already, add the challenge question to your problem solving, “what would it take for me not to be in that meeting?” Simply asking the question is a powerful reminder of the expectations for incorporating organizing into your advocacy work.

Pivoting your focus from just the individual worker problem, grievance, or disciplinary matter at a school to questions about the state of the union in a particular school or workplace, such as in questions 3, 8, 9 and 10, can be an important reminder that building our power is in fact the central mission of staff.

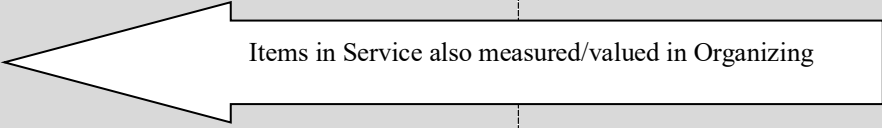
Club or Union?

	Unorganized	Club	Union	Fighting Union
Budgeting	Little or no local funding ☐	Funding used to recognize activists -- stipends, meals ☐	Funding used to recognize activists and also to reach out to members: stickers, buttons, tee shirts, picket signs. ☐	Funding used to release activists to do work, to communicate with members, and to open opportunities to the newly active. Funding supports coalition work and socially focused issues ☐
Roles	A few officers, risk of vacancy ☐	Proliferation of titles and stipends to Presidential allies ☐	Titles and roles generally tied to actual activities; if there's a treasurer, there is a budget; if there's a newsletter chair, there's actually a newsletter ☐	Titles rotate regularly, or are even dropped when no longer needed ☐
Bargaining	No bargaining, or done by a single expert (UD, President) ☐	Small group of the usual folks on the bargaining team that the president trusts ☐	Team represents all major job categories. Criteria is whether or not the president trusts them and they are recognized by members ☐	Team represents all major job categories; criteria is whether they are trusted by the members ☐
Leaders	Volunteers if any ☐	Tends to be the same small group of folks that populate other teams. Little to no risks are taken. ☐	Elections are regularly held and there are sometimes contested positions. Leaders can move others to act. However, their focus is on activism and mobilizing instead of term organizing. ☐	Are trusted and respected by members, and there is a healthy election process with a number of good candidates. Leaders routinely deliver on persuading large groups to take public collective action; the and actively seeks other trusted and respected leaders. Leaders use their agency to take risks that result in growth. ☐
Equity	Very little prioritization of racial equity or inclusionary practices by local leaders. ☐	An awareness of the value of equity-based practices but seeing that as the districts role to execute. ☐	Values diversity and has an 'official' position reserved in the leadership for a diversity representative. Limited interactions with the community around valuing racial equity and inclusion. Still seen as the district's responsibility to implement equity based practices. Leadership may reach out intermittently to underrepresented employee groups. ☐	Infuse bargaining with concerns that address race, class, democracy, historically marginalized communities/members, and equity issues. Local union budget reflects equity as a priority and positions in the union. The commitment to equity is explicit. Management and Labor are partners in engaging families, community and ethnic groups to support the local public schools. Local leadership and positions in the union reflects the diversity of their membership and/or community they work in. Leaders see racial equity as their responsibility to implement and lead on. ☐

	Unorganized	Club	Union	Fighting Union
Advocacy	None, or done by staff and/or local president Used as one of the few justifications to pay dues ☐	Few members may help with advocacy with much support from staff. Advocacy is solely viewed as a service to single members. ☐	Intentional identification and training of member advocates who conduct low-level meetings with support of higher levels from staff. Most advocacy is still viewed as a service to individuals with some understanding that protecting the work standards are in everyone's interest. ☐	Advocacy is primarily viewed as way to build worker solidarity and ways to exercise collective action in response to poor work standards. Issues to organize around. ☐
Activity	None, or led by the union, the staff, or by union members. No ownership. ☐	Programs for individual interest with little risk in participating. Led by one person, and focus of change is on personal practice. ☐	Works to have leaders design and lead the programs. Focus is on change of relationship with the union from rank and file to leader. Mobilizing and activism are the norms focused on traditional worker issues. ☐	Organizing is the norm focused on the solidarity of the group and the work is to apply pressure on a system of oppression. Issues are broad and include social movement thinking. ☐

Organizing and Service Working Together

NOTE: When considering the issue of "creating a culture of organizing," it is vital to realize that it is not the issue of organizing vs. service. Service to members is important. The point of consideration is how does a pure "service culture" which is episodic build the capacity of the organization? An organizing culture which is continual and sustainable provides the context for the servicing of members and builds the capacity of the organization. Organizing supports the delivery of services, it is not an either/or proposition. The organization has placed value on those things that we can count and quantify. The following illustrates how an organizing culture provides the context for the service culture.

Organizing (Continual/sustainable)	Service (Episodic)
	
Clearly stated vision developed collaboratively that engages members, leaders, staff	Number of members maintained
Number of programs and resource allocation that reflect association mission/vision/core values	Number of grievances filed and processed and employment issues solved
Ratio of members involved in programs that welcomes member participation	Number of arbitrations
Number of new members recruited/ retained	Number of contracts negotiated/unresolved
Number of new leaders identified and trained	Percent of salary increase negotiated
Number of new minority leaders identified/trained	Number of unfair labor practices filed
Number of members engaged in association decision-making and broaden power sharing in the organization	Number of successful election campaigns
Number of political and community coalitions	Amount of PAC fund raised
Number of grassroots political action organizers	Number of successful legislative initiatives
Purpose of the organization known in community via known "brand" of the organization	
On-going assessment of organizational effectiveness	

The "Servicing Model" vs. The "Organizing Model": How the Two Models Differ

Service



	Representation/Servicing	Organizing Empowerment
<i>What the Union is</i>	SERVICES TO members to improve wages and benefits and working conditions.	A PROCESS USED BY members to improve wages, benefits, and working conditions.
<i>What the Member expects</i>	OTHERS will do it FOR ME	WE will do it FOR OURSELVES
<i>Who establishes goals</i>	A few leaders and union staff	Many members and their leaders and staff.
<i>Who acts</i>	A FEW ACT FOR members. Members support staff.	MANY organize and act FOR THEMSELVES . Staff supports MEMBERS .
<i>How they act</i>	Individuals, often alone , represent others. STAFF decide strategies and action plans.	Groups, act together , on their behalf. Members decide strategies and action plans.
<i>Union Visibility</i>	Mainly INVISIBLE	Highly VISIBLE
<i>Union Communication</i>	Top-down , with a narrow organizational focus, providing one-way information flow , mainly on paper, through a formal network of "contacts," initiated by staff or leaders.	Bottom-up , with a broad organizational focus, providing two-way information flow , staff or mainly face-to-face, through an informal network of "who-knows-who," initiated by members.
<i>Use of Volunteers</i>	ONLY a FEW , on an assigned basis, to fit organizational needs.	MANY, MANY, MANY! As each individual chooses, to fill a role that matches their own inclination or skill.
<i>Skills Required</i>	Negotiations, lobbying, technical labor relations, that are REPRESENTATION and PRODUCT oriented, which are invested in the few.	Motivation, supporting, training, that are EMPOWERING and PROCESS oriented, which are invested in the many.
<i>Collective Bargaining</i>	Staff and a few members negotiate and present a PRODUCT to members. Most of the activity takes place AT THE TABLE, INVOLVING THE FEW .	An extensive organization of member committees is created and engages in the process of developing bargaining strategies and goals including negotiations directly with the employer. Most of the activity takes place AWAY from the table, involving the MANY .

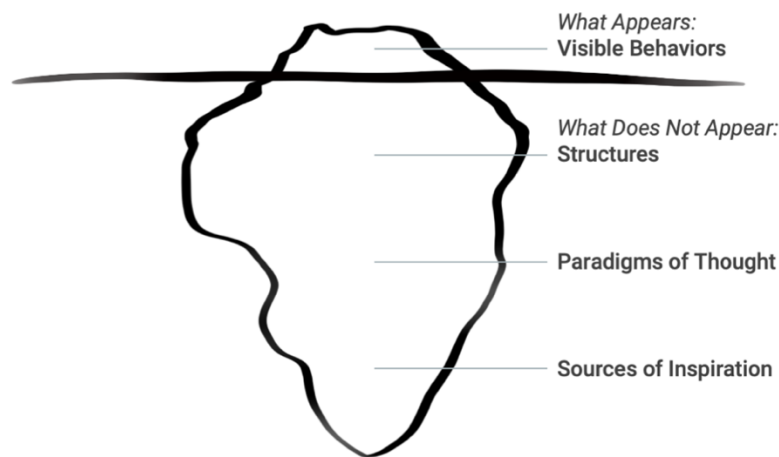
Organizing



Tool: The Iceberg Model

Overview

The Iceberg Model is a diagnostic tool that is used to analyze systemic structures and identify blind spots that cause a team/organization/society to collectively reproduce results that no one wants. The Iceberg Model makes underlying structures, paradigms of thought, and sources visible. When these are ignored, they keep teams locked into reenacting patterns of the past.



Application

The Iceberg Model lets participants:

- **identify leverage points** that allow a system to shift from operating at levels 1 (behavior) and 2 (process & structures) to levels 3 (paradigms of thought) and 4 (sources of inspiration).
- **address challenges on the level that they are created** so that they can be transformed.
- **shift perception** from inside individual heads to outside organizational boundaries (the field).
- **facilitate a collapse of the boundary** between observer (an individual) and observed (a system) and recognize that "I am part of the problem."
- **create optimal conditions for decision making** by recognizing the source-level of awareness.

Principles

When using the Iceberg Model as a tool, consider applying the lens of the Matrix of Social Evolution to the place from which your perception arises:

- **Attend** from downloading, to seeing, to sensing, to presencing
- **Converse** from downloading, to debate, to dialogue, to co-creative flow/presencing
- **Organize** from centralized, to decentralized, to networked, to ecosystem
- **Govern** from hierarchy, to markets, to negotiation, to awareness-based collective action

Resources

- Bird, Kelvy. 2018. *Generative Scribing: An Art of the 21st Century*, Cambridge, MA: PI Press.
- Scharmer, Otto. 2007. *Theory U*, Second Edition, Chapters 10, 15. Oakland, CA: Berrett-Koehler.
- Senge, Peter. 1990. *The Fifth Discipline*, New York, NY: Currency Doubleday.

Process

Setup

- **People:** This practice can be done individually or in a group.
- **Place:** This tool can be used anywhere.
- **Time:** 15–30 minutes.
- **Materials:** Use the worksheet on the following page. Or gather appropriate writing materials and redraw the worksheet large on a flip chart.

Steps

Step 1: “Scale Down”

Scale down the iceberg on the left by answering the following questions about your current reality:

1. What behaviors and events are we seeing?
2. What structures are shaping those behaviors and events?
3. What beliefs and mental models are shaping the structures?
4. What levels of awareness are shaping the beliefs and mental models?

Step 2: “Scale Up”

Now scale up by answering these questions:

5. What levels of awareness do we need to be operating from?
6. What beliefs and mental models will support the shift?
7. What structures will be needed?
8. What behaviors and events would we like to see as outcomes?

Step 3: Debrief and Conclude

- When you are finished, debrief with a colleague or as a team.
- Retain the drawing for reference as you proceed through the rest of the program.

Iceberg

Current Reality

1. What behaviors and events are we seeing?

2. What structures are shaping those behaviors and events?

3. What beliefs and mental models are shaping the structures?

4. What levels of awareness are shaping the beliefs and mental models?

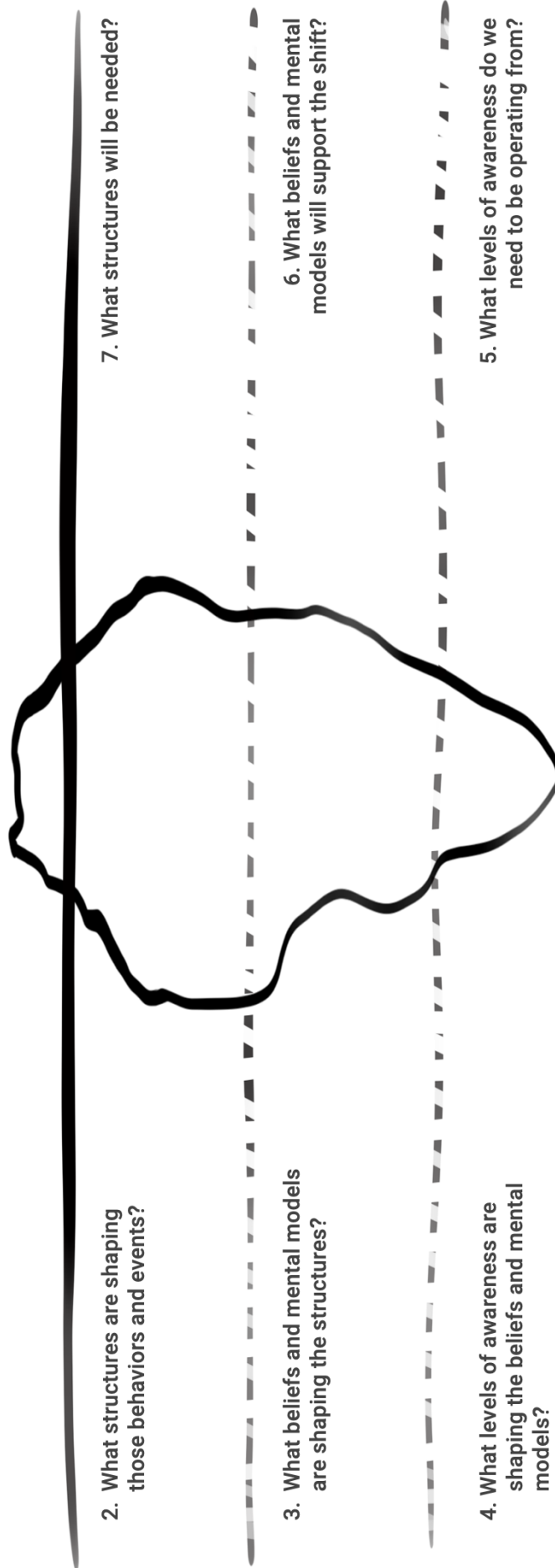
Future Vision

8. What behaviors and events would we like to see as outcomes?

7. What structures will be needed?

6. What beliefs and mental models will support the shift?

5. What levels of awareness do we need to be operating from?



Tool: Guided Journaling

Overview

Guided Journaling invites practitioners into a process of self-reflection. The journaling questions follow the U-process.

Application

Guided Journaling is a tool for the bottom of the U-process and builds on a completed co-sensing phase. It cannot stand alone! It allows participants to step into a deeper level of self-reflection and is often followed by a solo experience to expand on the insights that arise.

Principles

- **Write first, then think.** Encourage people to just start writing and see what emerges.
- **Respect privacy.** If you're facilitating Guided Journaling for others, it's important that you never require participants to share their journaling notes in public.
- **Reflect on the experience.** After a journaling practice you may want to create an opportunity to reflect with others. But this is always voluntary.

Resources

- Scharmer, Otto. 2007. *Theory U*, Second Edition, Chapter 21. Oakland, CA: Berrett-Koehler.

Process

Setup

- **People:** This tool can be used with groups of any size.
- **Place:** Prepare a quiet space that provides each participant with some privacy.
- **Time:** A minimum of 45 minutes and up to 90 minutes, depending on the context.
- **Materials:** Pen and paper for each participant.

Steps

Step 1: Share "What is journaling?"

Journaling means letting your hand guide your writing. Journaling does not mean "think first and then write"; instead, it means "put pen to paper and just begin to write." Guided journaling uses the same method, but each journaling step is triggered by a question.

Step 2: Read the Suggested Journaling Questions

Read the questions in sequence, moving when you sense that the majority of the group is ready. *Be sensitive to the amount of time spent: don't let the session drag, but also don't rush it. It is important to get into a flow and not to think too much.* You may adjust the journaling questions to the group or team that you are working with, but try to adhere to the purpose and intent of each question. The questions should follow the U-process but might benefit from being adjusted to the language, focus, or culture of the group you work with.

1. Being born I: Over the past days and weeks, what did you notice about your emerging **Self** and what is wanting to be born?
2. Being born II: What did you notice about what is wanting to be born in your context or community?
3. Frustration: What about your current work and/or personal life frustrates you the most?
4. Happiness: What about your current work and/or personal life inspires and energizes you the most?
5. Helicopter I: Watch yourself from above (as if in a helicopter). What are you doing? What are you trying to do at this stage of your professional journey? Your personal journey?
6. Helicopter II: Watch your collective journey from above. What are you trying to do collectively at this stage of your collective journey?
7. Your younger self: Look at your current situation from the viewpoint of yourself as a young person, at the beginning of your journey: What does that young person have to say to you?
8. Footprint: Imagine you could fast-forward to the very last moments of your life, when it is time for you to pass on. Now look back on your life's journey. What would you want to see at that moment? What footprint do you want to leave behind on the planet?
9. From that future point of view: What advice would you give to your current self?

10. Now return to the present and crystallize what it is that you want to create: your vision and intention for the next 3–5 years. What vision and intention do you have for yourself and your work? What are some of the essential elements of the future that you want to create in your personal, professional, and social life? Describe or draw as concretely as possible the images and elements that occur to you.
11. Feel the connection with the global community devoted to Leadership for Awareness-based Systems Transformation. What is our collective highest future possibility? What could we be an instrument for? What could we collectively create within the next 3–5 years?
12. Letting go: What would you have to let go of in order to bring your vision into reality? What is the old stuff (habits, mindsets, etc.) that must die? What is the old skin (behaviors, assumptions, etc.) that you need to shed?
13. Letting come: Where do you find the Seeds of tomorrow in your context and environment NOW?
14. Prototyping: Over the next three months, if you were to prototype a microcosm of the future in which you could discover “the new” by doing something, what would that prototype look like?
15. People: Who can help you make your highest future possibilities a reality? Who would be your core helpers and partners?
16. Action: If you were to take on the project of bringing your intention into reality, what practical first steps would you take over the next 3 days?