

Discussion Guide for Practical Radicals

“Practical radicals are not content to be on the right side without a plan to make their vision a reality.”



The material is based on the book *Practical Radicals* by Deepak Bhargava and Stephanie Luce, New York: New Press. 2023

Design and illustration by Jeffrey D. Phillips.

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Facilitator's Guide

Practical Radicals can be a textbook for a semester-long class, with each week focused on one or two chapters and questions below.

If you don't have a full semester, we recommend a four-part study series, with two hours per session. The following is a sample discussion guide:

Session 1: The preface and Part I of *Practical Radicals*.

Discuss questions 1, 2 and 7.

If you are a group who doesn't know each other well, **Tools 1** and **2** can help you establish common ground.

If you are an established group working on joint campaigns, **Tools 3**, **7**, and **33** are valuable for developing long-term strategy. You won't have time to complete them in the session but pick one to start.

Session 2: Part II of *Practical Radicals*.

Discuss question 8.

Use **Tool 9** to explore the seven strategies and practice working with ones that are new to you.

Choose one of the strategy chapters to explore in more depth, and try the associated tools.

Session 3: Chapters 14-17 of *Practical Radicals*.

If your organization or group is grappling with internal conflict, discuss question 17 and review the associated tools.

Discussion question 19 offers new insight into strategy. Discuss the question and try out **Tool 18** (OODA Loops) to generate fresh ideas.

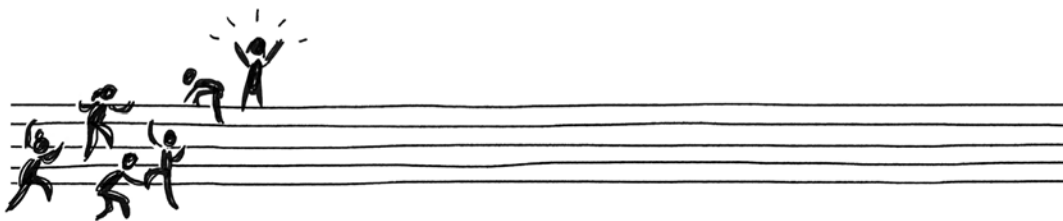
Time permitting, discuss question 20 and try out **Tool 36** (Long-term agenda).

Assign everyone to review question 18 and associated tools as homework.

Session 4: Chapter 18 of *Practical Radicals*.

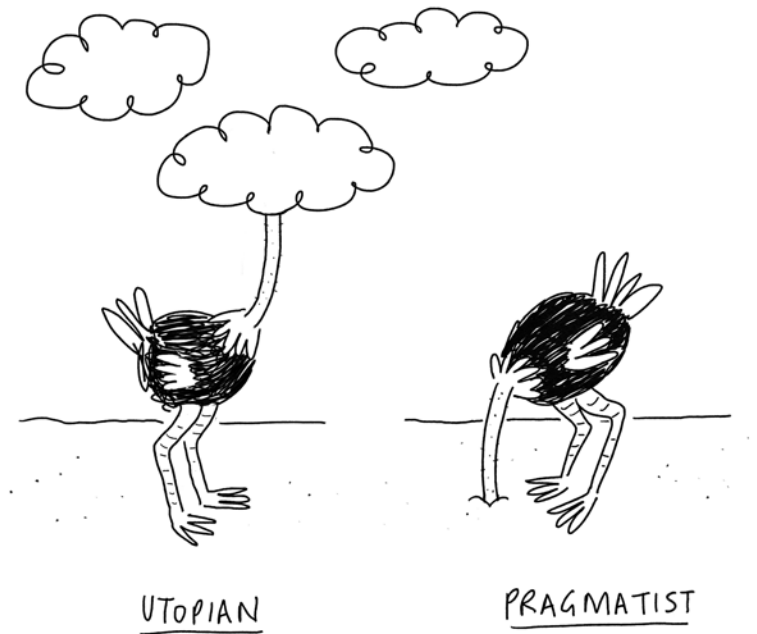
Discuss questions 22 and 23.

How might you develop your individual and collective skills as strategists? Return to your homework from the last session to think about next steps for developing your strategy capacity.



Discussion

(Part I) Foundations: Vision, Strategy, and Power



Question 1

The authors define practical radicals as “organizers who hold big visions for transforming society and are willing to do what it takes to win in the real world” (p. ix). This requires avoiding the dangers of pragmatism and utopianism (p. 18). In reality, most people lean towards one or the other tendencies at different points in their organizing.

Have you leaned towards pragmatism or utopianism? Describe the tensions you might experience trying to be a practical radical.

Is there a legitimate role for pragmatists and utopians in movements? If so, what is it?

Are there people or organizations in your movement sector who are exemplary practical radicals? What specific decisions or ways of operating speak to these traits?

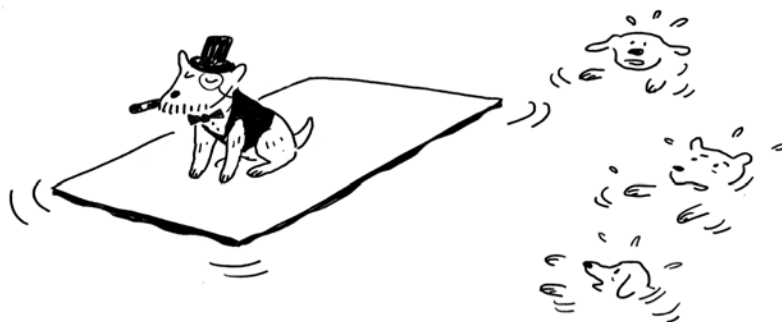
Many progressive groups are dealing with internal conflict that turns on differences between pragmatists, utopians and practical radicals. How might an organization create shared agreements about strategic orientation to minimize conflict along these lines?

Question 2

The authors argue that winning transformational social change requires both a long term vision and good strategy. Do you agree? How does having a vision lead to better strategy?

Discuss Stuart Hall's concept of root ideas (p. 19) and how they can help ground vision.

Tool 2 provides a framework to think about vision and what another world might look like.



Question 3

The authors use the terms underdogs and overdogs in the book as shorthand for the groups of people who are oppressed and trying to win justice, and the groups of people fighting to maintain the status quo.

Thinking about your campaign or movement, who are the underdogs? Who are the overdogs? Who is the “we” you are fighting for? Who is speaking for the “we”? Can you expand the “we”?

Question 4

What is the difference between vision, north star and values? (See Chapter 2). Can you give an example of each from a campaign you have worked on?

Tool 1 can help organizers find their common shared values.

Question 5

Strategy depends on the conjuncture: a moment in history, particularly when the political and economic conditions are shifting. In order to evaluate the strengths and weaknesses of different strategies you should start with an analysis of the conjuncture.

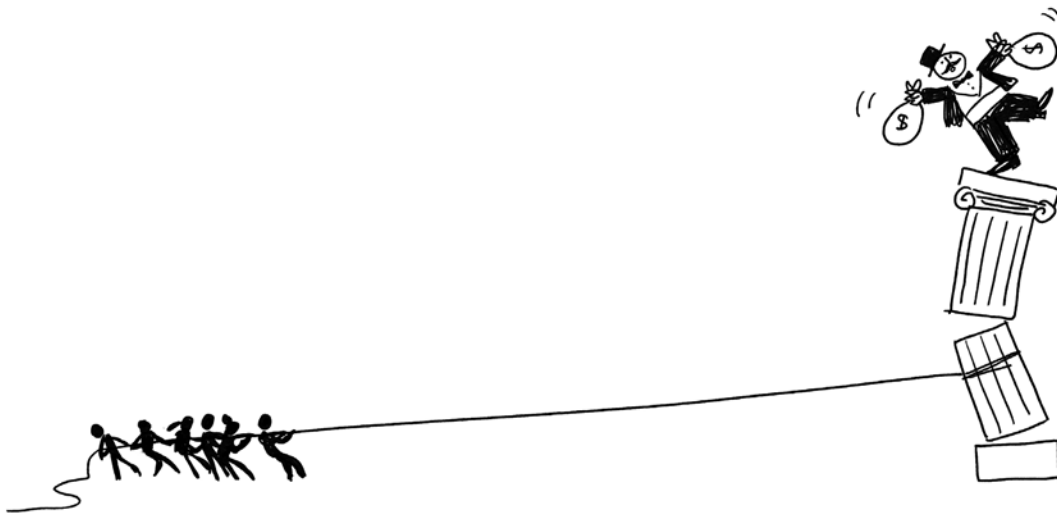
Review **Tool 3** and discuss the possible dimensions that factor into a conjunctural analysis.

Conducting a full conjunctural analysis takes time and research. We suggest forming a team of people who bring different sources of knowledge to complete **Tool 3** together. This will likely require several weeks or months. Once you've done your analysis, you can revisit it on an annual basis (or as needed) to assess what has changed.

Question 6

Think about the campaigns you worked on. Who developed the strategy, if anyone? Did you consider the factors listed in Chapter 3 when devising your plan? Or, if you are looking to develop strategy for a current campaign, how might you answer the questions in **Tool 5**?

Reverse engineering (**Tool 4**) is a good way to start practicing with strategy development. Start with an end goal, such as: everyone has quality health care. Use the tool to think of a bold policy win and work backwards: what would it take to achieve your demand?



Question 7

The strategies we use depend in part on the power we have available. In Chapter 4 the authors describe six forms of power. Can you name these six forms and come up with examples of how they impact your work?

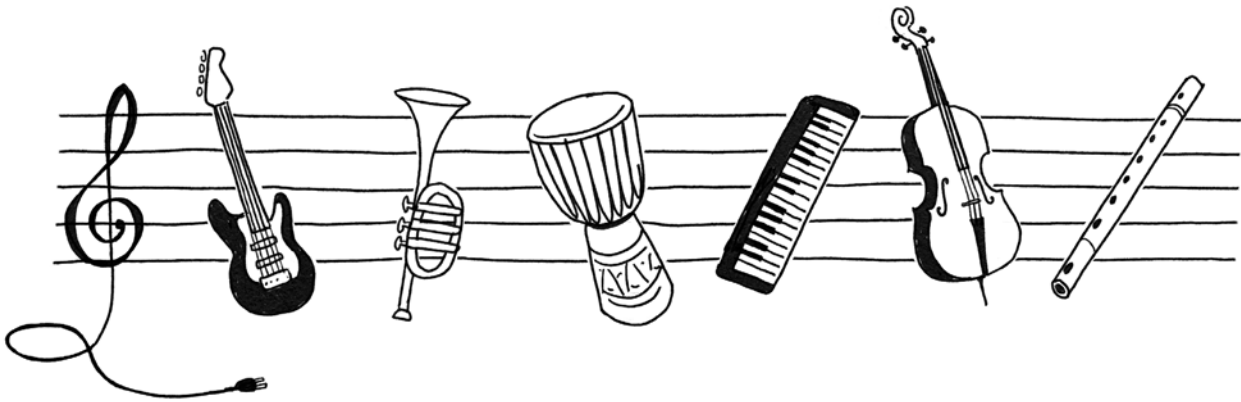
Use **Tool 7** to analyze the forms of power your campaign/organization/movement sector has access to, which forms you need to develop, and how the forms interact.

You can also use **Tool 7** to analyze the forms of power your opponents have access to.

Tool 33 provides a template for conducting a power analysis, as developed by SCOPE.

Pages 413-414 provide the instructions, and page 415 is a blank grid for you to conduct your own power analysis of a campaign you are working on.

(Part II) Notes of Change: Seven Strategies Underdogs Use to Win



Question 8

What are the seven strategy models described in *Practical Radicals*?
How do they relate to the six forms of power described in Chapter 4?

(See the strategy formulas on pages 120–121)

Is your organization building power through your strategy model?

Review the table in **Tool 9** to get familiar with each of the models.
Which model are you most familiar with? Would you add any new models, or take any off this list?

Pick the model you are least familiar with and work through the steps in **Tool 9** to learn a new approach.

Some students hate electoral work and think it will never lead to change; others are skeptical of care work as an actual strategy. Use **Tool 10** to debate whether each of these strategy models is strategic!

Articulate your short, medium and long range goals for your group, campaign or movement sector using the Midwest Academy Strategy Chart (**Tool 34**).

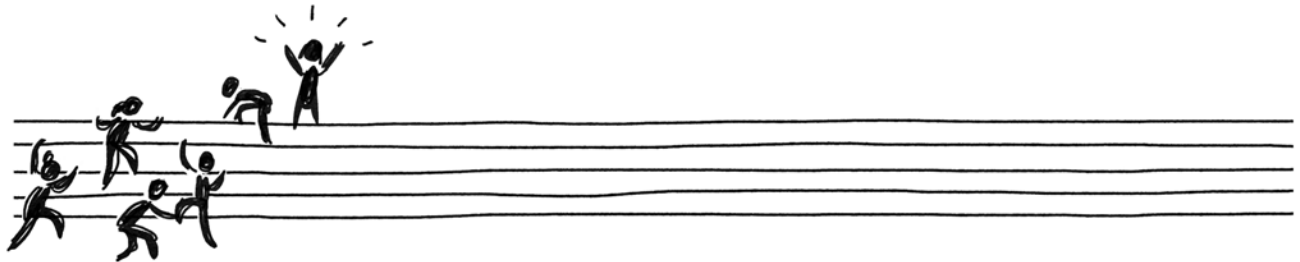
Question 9

Base-building is one of the most common strategy models used by U.S. organizers, and is the foundation of community and labor organizing (Chapters 6.1 and 6.2). Some people have claimed that this kind of “slow and steady work” is in decline, due to factors such as technology, social media and the pandemic. But Make the Road and the St. Paul Federation of Educators (SPFE) still see base-building as a key source of power. What are the strengths and weaknesses of the base-building strategy?

Do you think organizing (as opposed to mobilizing) is in decline? If so, why? What are the necessary steps to support a revitalization of base-building?

Base-building models should train members and junior staff as leaders, to create “leader-full” organizations. **Tool 11** is useful for developing leadership capacity. **Tool 35**, the Leadership Development Ladder developed by the Maine People’s Alliance, assists organizations in moving members and staff up the leadership ladder. How is your organization or movement sector deliberately and rigorously cultivating leadership? Is leadership investment done with an equity lens?

Some labor unions have used Bargaining for the Common Good as a way to build power, create alliances, and deepen their base-building work. For example, Leah VanDassor got active in the SPFE when she learned about its work bargaining for student and teacher needs together. **Tool 13** offers an introduction to Bargaining for the Common Good. How might this framework be used by your organization or movement sector to build movement alliances with other groups that have shared opponents/targets?



Question 10

Many social justice protests, marches and rallies don't actually disrupt, or prevent, the overdogs from doing what they want to do. In Chapter 7, the authors say that these kinds of actions might be valuable for building narrative power, or building solidarity, but are not necessarily using disruptive power. Can you think of an example from your experience of a protest that was not disruptive and an action that was disruptive? What's the difference between the two?

Use **Tool 15** to think about potential chokepoints: opportunities to use disruptive power.

The authors argue that while it isn't possible to fully plan and predict disruptive movements, there are things organizations can do to help fan the flames once such disruption begins and turn a disruptive action into a disruptive movement. Follow the prompts in **Tool 16** to think about how to prepare for future moments of crisis or disruption.

Question 11

Changing the narrative is about more than catchy slogans or sophisticated communications work (Chapter 8). It must get at the root ideas that help people make sense of the world and their identity. What are other key factors of a successful narrative shift strategy? How have you seen this done, by underdogs or overdogs? **Tool 19** provides resources that can help you develop your own narrative strategy.

Question 12

The electoral change strategy generates a lot of debate! Some underdogs have given up hope that it can lead to real change, but others see the way in which overdogs have used this strategy to gain tremendous power and undermine underdogs in dangerous ways. *Practical Radicals* argues that we need to ask, “under what conditions is electoral change work more strategic?” And “what will it take to win governing power?” Based on Chapter 9, what do you think makes electoral change work more strategic?

Use **Tool 20** to help guide your discussion about the ways to make electoral work more strategic.

Tool 21 is a way to debate strategy for building a 10 year electoral plan.



Question 13

An inside/outside campaign is a way to win policy victories when you don't have enough power to govern (Chapter 10). But the strategy is hard to pull off. What are some of the common challenges inside/outside campaigners? How might you avoid some of the common pitfalls?

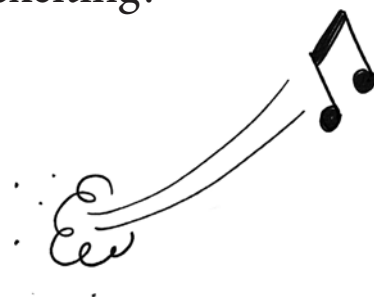
Policy feedback loops are a way to make sure policies are monitored and enforced, impact the communities they are meant to help, and build more power and capacity for the next fight. **Tool 22** helps you think about potential policy feedback loops you can build into your inside/outside policy campaign.

Another way to think about building long-term capacity through policy work is to distinguish between types of reforms. **Tool 23** helps determine which kinds of reforms are more likely to lead to structural change.

Question 14

What do you see as the key features of the momentum model? Did you find any of the examples in Chapter 11 especially exciting?

Tool 24 will help you understand the power of the momentum model and how it might be used to win a big goal.





Question 15

Were you persuaded by the authors that collective care is a strategy model (Chapter 12)?

Do you think collective care can be strategic? Why or why not?

What types of power and other strategies might become available to you if members of your community had some of their care needs met?

Tool 12 helps organizations identify care needs in their community and think through ways to meet those needs in a way that builds collective capacity.

Question 16

Chapter 13 tells the story of how a wide variety of actors and organizations used the six forms of power and seven strategy models to fight against and end chattel slavery in the 1700s and 1800s. The authors argue that such transformative change would not have been possible with only one or two strategies. Are you persuaded by their argument?

If so, what lessons do you take from the abolitionists of the past for your organizing work today?

(Part III) Melodies for Movements: Underdog Strategy in the 21st Century



Question 17

The greatest power that underdogs have is solidarity. Underdogs are strongest when they stick together. Yet social justice organizations and movements are plagued by internal dissent.

Chapter 14 lists nine common reasons why underdogs argue. Which of these, if any, have you experienced in your work?

We will always have reasons for conflict; the hope is that we can develop healthy tools to deal with it. Do you have examples of successfully dealing with internal conflict in your work?

Tool 25 is a list of resources for dealing with conflict, including the article by Maurice Mitchell (with accompanying discussion guide).

Tool 26 offers a framework for examining race and gender conflict within organizations, and **Tool 27** helps discuss and process potential tensions between purpose and belonging.

Question 18

The authors argue that strategists are made, not born (Chapter 15). Do you agree?

Which of the practices discussed in the chapter have you tried, if any?

Which ones might you try?

Use **Tool 28** to reflect on the practices you might explore.

We should work on our own individual capacity for strategic leadership but must also devote time and resources to improving the strategic capacity of teams. Use **Tool 30** to identify ways to strengthen the capacity of your team.

Question 19

Overdogs put a lot of time and resources into long-term strategy. Much of that is based on deception, and some rooted in violence. But the authors argue that there are a few tools that the military and corporations have developed that can be useful for underdogs to learn (Chapter 16). Which of those tools do you think might be useful in your own organizing?

Are there other tools you've learned from other sectors you want to share with your colleagues?

How might you disrupt your opponents OODA loop in a way that disorients and destabilizes them, allowing you to take control (**Tool 18**)?

As you begin to develop your strategy skills and expand your circle of strategists, you'll likely come up with a healthy list of ideas for moving your campaign forward. The lean start-up approach (**Tool 29**) allows you to test out an idea in an efficient way, before going all-in.

The military uses table-top exercises to test out potential scenarios, thereby developing strategic muscles for possible positive and negative outcomes. In **Tool 17**, you can try a table-top exercise exploring the potential of a worker upsurge.

For more tools from the opponents, see **Tool 31**.

Question 20

Transformative change takes time, and will involve a lot of failure along the way. Movements have cycles: times of more or less activity (Chapter 17). Have you lived through periods of upsurge?

Where is your own organization/movement located in terms of a movement cycle? (*Practical Radicals*, p. 291-292).

If you are in a down period, what kinds of strategies and activities might you engage in to prepare for an upsurge?

The Grassroots Power Project developed the Long-Term Agenda to help organizations plot out how current fights can eventually lead to long-term structural change. Use **Tool 36** to map out a plan for your organization's short, medium and long-term agenda.

Since social justice work requires taking risks and fighting well-resourced overdogs, it will mean a lot of loss. **Tool 32** helps think about how to turn a failure into a successful failure, so that you develop capacity for winning the next fight.

Develop your own long-term plan to move beyond defensive battles. Use **Tool 8** to write a Powell Memo for the left.

Question 21

In addition to seeing how our organizations and movements function over time, we must develop a picture of movement ecosystems, and how organizations fit together at a moment in time (Chapter 17). Not every group can do everything. What is the ecosystem that you and your organization exist within?

What role do you play?

What are some other key actors and roles in the system?

Is your ecosystem functioning in a healthy way?

Are there roles where there is too much competition, or roles that need to be filled?

Tool 14 lists resources that help organizations see the movement holistically, including assessing the ecosystem.



Question 22

In the conclusion (Chapter 18), the authors offer thoughts on the strengths of each of the strategy models. Which models is your organization using now, and which ones might you explore given the conjuncture?

Question 22

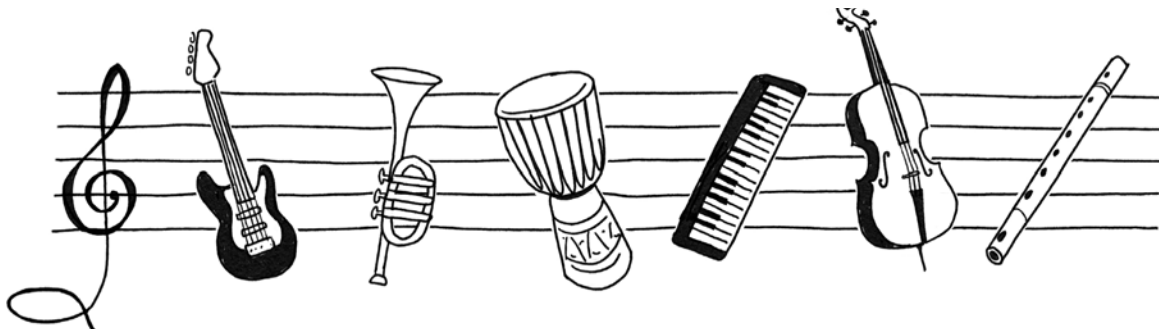
What are the four suggestions the authors offer for movements and organizations to improve their strategy work? (Chapter 18, pages 311-320).

Do you see possibilities for pursuing these suggestions in your own work?

What would it take to move these ideas forward?

Tool 6 contains a list of resources and consultants that can help your organization develop its long-term strategic capacity.

Tools



Tool 1

Shared Values

Part 1:

1. Start by sharing a definition of values, such as the one provided here:

Values are fundamental beliefs about the world that help guide behaviors and attitudes. Values help make sense of the world and determine what is important.

Examples: *Compassion, integrity, dependability, courage, sustainability, kindness*

2. Instruct the group:

Everyone should take five minutes on their own to think of particular spaces or places that they love and appreciate and in which they feel safe, fully alive, and themselves. What are those spaces like?

Have each person translate the description of those spaces into values they believe should guide a future world they want to build, and write five to ten values, each on a sticky note.

3. Ask people to place their sticky notes on a board and group the ones that are the same.

4. Starting with the most common values on the board, groups should draft a one- to two-sentence definition of the value.

The definition may involve similar values (for example, democracy and participation). See if you can reach an agreement on a shared definition.

5. Try to find two to five values that the group agrees are fundamental to a shared vision of a future world.

Part 2:

6. In small groups, think about your workplaces, schools, health care systems, and laws, and then do the following:

- Name the values these institutions rest upon or promote.
- How do those values compare to the ones your group named in step 5?
- What are a few things about these institutions, systems, or structures that would need to change to be in alignment with your group's values?

Tool 2

Prompt: Envisioning a Future World – Two Reflections

1. Reflect on your life experiences. Is there a moment when you felt most free and liberated? Or a scene from a book or movie, some artwork or music, that opened your mind to another world that was more like the one you hope to build?

What was it about that experience that felt liberating? Did it involve a group of people? If so, were they people you knew, or strangers? Was it something that pushed the boundaries of the familiar? Did the experience change your world-view? What did you learn from that moment about the kind of world you hope to build?

2. What would it look and feel like for everyone to feel cared for?

- In words or pictures, share that experience.
- The facilitator should bring a pile of photos of positive things, emotions, interactions of people and nature, and then ask people to pick one to three images and describe why they would include them in the imagined future. Or, time permitting, make a collage.
- After, the facilitator should ask follow-up questions to call people into more concrete visioning: What would it feel like to live in this world? What would you see when you first step outside in the morning? With whom would you interact?

Tool 3

Conjunctural Analysis

Use this rubric to conduct a basic analysis of the conjuncture.



Form of Power	Power from Above (Overdog Power)	Power from Below (Underdog Power)
Ideological	What is the current “common sense” that explains how our society works? How strong or fragile is it? Where are there potential cracks? What is the prevailing “story of us”? (our history as we are taught it)	What is an alternative “common sense”? Is there an alternative “story of us”? Who is the “other” in the story? Is there one that doesn’t create an “other”? How popular are alternative stories?
Economic	What are the current major driving forces in the economy? Who controls what we produce? Who holds wealth? Where are there vulnerabilities in the dominant system?	Where do movements have the power to impact the economic interests of those in power? Where are workers strategically placed so that they are difficult to replace? What are the “chokepoints” in economic production and distribution? (Tool 15). And which of those do we have access to influence?

Form of Power	Power from Above (Overdog Power)	Power from Below (Underdog Power)
Political	Who is in power across the three branches of government? Given that, where can we expect contradictions, stalemates, or conflicts within or across the branches of government? Who is in the current coalition of the political parties? Who's in? Who's left out? What or who is up for grabs or shifting?	What are our sources of power in government? What laws and policies can we use or pass to build more power?
Military (including police and border patrol)	What powers does the military have? What is the state of the relationship between the military and government? How does the military work to keep us down? What powers do police and border patrol have?	How have our movements related to the military in the past? How can we reduce the influence of the military and police? What is our relation to the police? Can we/should we align with them to enforce laws (such as access to voting, prevention of wage theft)? How prepared are we to respond to violence from the state or nonstate actors?

Form of Power	Power from Above (Overdog Power)	Power from Below (Underdog Power)
Solidarity	What associations and networks do those in power have? Who are members of the ruling coalition (thinking across economic, political, military and ideological spheres)? What sectors, groups, people? Which ones are key to preventing us from making change? Where are there or could there be divisions in the ruling coalition? How might we disrupt the ruling coalition, drive a wedge, cause layers to peel off?	What organizations do we have? How many members? What resources do they have? How strong is their internal cohesion and member participation? How well do these organizations work together? Are there networks that allow for organizations to operate cohesively as an ecosystem? Who is energized on our issue but has no organization? Who is passively supportive and should be moved to take action? How can we drive a wedge to make it impossible to be neutral, and appealing and meaningful to join our side? Who else across the ecosystem is taking responsibility for organizing those people? Where are there gaps? Given the events in the coming year, what signals will our base and constituencies be getting from the media about what matters? For instance, if it's a general election year, there will be a lot of media coverage around that. How can we build off of that energy to bring people into our organization or urge them to take action? How do we create a majority coalition? Who do we need in our coalition? How many people? Why?

Form of Power	Power from Above (Overdog Power)	Power from Below (Underdog Power)
Disruptive	How are elites causing disruption/chaos?	What are examples of non-economic disruption? Perhaps disrupting the status quo or norms (see Tool 6 for Gene Sharp's 198 methods of nonviolent action) Where are the chokepoints? (Tool 15) Are we located in position to take advantage of those? Do we have enough solidarity power to use disruptive power?



Tool 4

Reverse Engineering

1. Define the outcome precisely.

This reverses the way strategy is often done. Usually we start from what we have and ask how we can put it to use. Or, we might start with a problem: workers are underpaid; incomes are too unequal; police brutality in Black communities; the Earth's temperature is rising.

Instead, start by defining an outcome as clearly as you can. Outcomes are clear and measurable—you will know when it has happened. The outcomes should be grounded in long-term vision and values.

Examples of outcomes:

- Ten thousand workers in industry X organized into a union by 2028
- Reduce homelessness in New York City by 80 percent by 2030

2. Clarify the single shift in the environment that would produce that outcome.

This is an exercise in radical reductionist thinking. The tendency in most strategy, especially on the Left, is to add multiple parts and subparts to keep people on board a plan. The result is often mush. Instead, in this exercise, we are forcing ourselves to commit fully: what is the one cause (A) that would result in outcome (B)?

This is the central element of reverse engineering. You should go beyond the obvious (for example: to win the election, we need to win more votes). This tool is an invitation to find the deepest causal mechanism.

It requires blunt, honest critique. Since everything rides on getting this right, everyone, including whoever proposes it, has to welcome interrogating the idea.

Examples of causes:

- To win a union of low-wage workers in a conservative southern city, a traditional organizing campaign won't work because the rules are stacked against workers. We need sustained disruption by thousands of workers that scares corporate and political leaders into seeking a settlement.
- To break the authoritarian coalition, we need to peel away support from large multinational corporations by raising the cost of their neutrality or support of far-Right candidates.

3. “Vivid description”: What would it look like if this were actually happening?

Once you've identified the potential shift, you need to imagine living it. What would be going on? Examples? Who is doing what? How are targets responding?

Example:

- Thousands of workers in a conservative southern city engage in slowdowns, walkouts, and strikes that disrupt business; workers and allies organize a strike fund to support the workers; the workers' cause becomes a defining fight that is part of popular culture and draws in more workers and community supporters; the movement reshapes the political battle lines in the upcoming election.

You should consider why the elements of the vivid description are essential to victory. For example, is the strike fund organized to create a sense of broad public support, or is its function to enable workers to sustain a strike that would otherwise be devastating for them?

4. Necessary conditions: What needs to happen?

All underdog groups operate with scarce resources. Disciplined strategy requires making hard choices about how and where to concentrate time, people, and money.

With your core team, brainstorm a list of things that need to happen in order to put the cause that will produce the desired effect into motion. For example, for sustained disruption in a conservative southern city to occur, folks might say that there needs to be a core leadership team of workers, organized community support including from clergy, support from elected officials or celebrities, and a massive organizing drive to reach large numbers of workers. You would then ask members of the core team to debate and vote on whether each proposed condition is necessary to have or nice to have in order to create sustained disruption.

For example, the team might decide on the one hand that support from elected officials or celebrities would be nice to have, but is not essential to success. On the other hand, large-scale outreach to workers and worker leadership could be seen as essential. The group might debate what kind or level of community support is necessary at the beginning of the campaign. Once the group settles on “necessary conditions,” they can work on the specifics of what it would take to make this happen.

5. Operationalize it.

Take the resources and people you have and identify what’s needed. What new resources and new allies are required to go all in for this big bet? What do you need for the cause (A) to produce the outcome (B)?

You may discover that A is impossible— even with more resources— in which case, you begin again with step 1.

Example:

- Stop several existing lines of work and redirect X dollars and Y staff to a campaign to organize low-wage workers, build a worker-led organizing committee, and engage in large-scale popular education leading to disruption. Recruit X, Y, and Z allies to help build a national strike fund and establish community / faith coalitions to back the workers. Develop a cultural campaign and invest X resources to reach Y audiences that features workers' voices in popular and social media and recruits artists to shape the narrative.

Tool 5

Prompt: Strategy Fundamentals

When embarking on a new campaign or organizing drive, here are some questions that a strategy team could ask:

Choices

- Are you making choices to commit resources to specific strategies that will have the greatest impact? Or have you built a laundry list of ideas that you won't be able to execute well?
- What have you decided not to do?
(See **Tool 21**: Strategic Debate tool.)

Empathy

- Do you understand the deep motivations of your target (decision makers) and your organized opposition?
- Can you predict how they will respond to some of your plans?
- What actions are likely to get targets to move in the direction you want them to?
- What does the target expect you to do?
- If you don't know the answers to these questions, what research could you do to better understand the motivations of decision makers and the opposition?
(Similar questions could be asked about your own base or persuadable people in the general population.)

Alliances

- Who are the key allies you will depend on to build this campaign?
- Do you understand their motivations?
- What sources of power do they have that you don't have?
(See **Tool 33**: Power Analysis, **Tool 7**: Power for Underdogs, and **Tool 3**: Conjunctural Analysis tools.)

Cause and Effect

- In its simplest form, what action are you proposing that you expect will produce which outcome?
- What Action A will produce Outcome B?
- Is that logic compelling and convincing?
- Are there opportunities to test your hypothesis about cause and effect?

War of Attrition or Annihilation?

- Are you seeking to get the opponent to the bargaining table to negotiate an agreement?
- What's the shape of the agreement you can imagine? Or, if you imagine winning outright and being able to dictate terms, what kind of victory will allow you to do that?

Where Does Strategy Come From?

- Who is on the team making the strategy that will guide the campaign?
- Who makes decisions to revise the strategy in the heat of battle?
- How will you meet the need to make fast decisions when necessary?
- Who is consulted and informed along the way?
- What processes are necessary to check in with stakeholders to get feedback?

Scripted or Improvisational?

- How many steps or actions are you scripting at the beginning of this campaign?
- How long do you expect to follow a scripted plan?
- As the opponent makes moves of their own, when might you shift to an improvisational response?
- What freedom do leaders at various levels of the campaign have to experiment?
(See **Tool 36**: Long-Term Agenda.)

Force or Guile?

- What parts of the campaign, if any, depend on surprise or deception?
- Are there actions that are designed to confuse, disorient, or demoralize, rather than overpower the opponent? (See **Tool 18**: OODA Loops.)

Tool 6

Resources: Strategy Toolkits and Training Organizations

Strategy Development Toolkits and Worksheets

- Assessing Your Organization's Strategic Capacity, by P3 Lab (Jane Booth-Tobin, Kal Munis, Lynsy Smithson-Stanley, Hahrie Han)
- Beautiful Trouble Toolbox, <https://beautifultrouble.org/>
- The Change Agency Toolkit, <https://thechangeagency.org/toolkit/>
- Gene Sharp, "198 Methods of Nonviolent Action," <https://wri-irg.org/en/resources/2008/gene-sharps198-methods-nonviolent-action>
- Bill Moyers, Movement Action Plan, <https://commonslibrary.org/resource-bill-moyers-movement-action-plan/>
- Kimberly Bobo, Steve Max, and Jackie Kendall. 2001. *Organizing for Social Change: Midwest Academy Manual for Activists*. Santa Ana, CA: Seven Locks Press.
- Joan Minieri and Paul Getsos. 2007. *Tools for Radical Democracy*. John Wiley and Sons.
- adrienne maree brown. 2017. *Emergent Strategy: Shaping Change, Changing Worlds*. Chico, CA: AK Press.
- Elsa A. Ríos and Surei Quintana, 2021. "Love Notes to Our Social Justice Leaders." Strategies for Social Change, LLC.

Training and Consulting Organizations

- | | |
|---|---|
| ▪ Grassroots Power Project | ▪ Training for Change |
| ▪ Labor Notes | ▪ Training Organizations with a Focus on Building Healthy and Effective Teams and Organizations |
| ▪ Leadership for Democracy and Social Justice | ▪ Black Organizing for Leadership and Dignity (BOLD) |
| ▪ Midwest Academy | ▪ Generative Somatics |
| ▪ Momentum | ▪ Management Center |
| ▪ Strategic Corporate Research Summer School, Cornell School of Industrial and Labor Relations, and the AFL-CIO | ▪ Rockwood Institute |
| | ▪ Wildfire |

Tool 7

Power for Underdogs

1. For this exercise, assume one of the following options:

You are in the leadership of a community organization in a large city; your group joins a coalition to raise taxes on the wealthy in the state.

You and your colleagues have just been elected as officers of your union and are looking to improve wages and working conditions (you can choose what kind of workplace / sector it is).

You and your neighbors have been dealing with a landlord who won't fix the heat or do basic repairs. They just announced a rent increase.

You are part of a climate justice group working to achieve a just transition in your state, both by reducing fossil fuel emissions, and by increasing investments in green sources of energy that benefit low-income communities and communities of color.

2. Using the chart, analyze the following:

What forms of power do you currently have? If you don't know, what kind of research would be necessary to figure it out?

How might you be able to build more power? Can you use one form of power to build another?

Form of Power	Definition	Factors to Consider
Solidarity	Ability to work collectively (in workplace, organization, sector, or society) Vote as a bloc Take care of one another	Number of members (and the size relative to the number of workers/ people in the sector) Resources (money, meeting space, support staff) Internal cohesion, depth of commitment Leadership development and training capacity Strategic capacity Union/organizational democracy Level of militancy Systems of communication and care
Disruptive	Ability to cause disruption and have economic impact, the power to wound (in the workplace and/or in the economy) Ability to block those in control from engaging in racist or sexist practices	Do you have scarce skills? Are you easily replaceable? Location in the workplace, supply chain, economy, and in terms of social reproduction How are white supremacy and patriarchy replicating themselves? Are there ways to disrupt those processes (laws, norms, practices, etc.)?
Ideological	Ability to gain public support/influence “common sense” to shift the narrative in your issue’s favor	What is the “common sense” around your issue? How much does the public know about your issue/goals, and how might you influence that? What groups do your co-workers or organizational members belong to? What groups might support you? What groups will you speak to? What tools/resources do you have to influence the “common sense”? (Access to media, ability to engage in actions to get attention, etc.)
Political	The rights people have gained through past struggle (laws, regulations, union contracts) The authority to govern The ability to pass laws	What are the labor and employment laws, housing laws, voting rights, civil rights—on the federal, state, and city levels? How well are laws enforced? What laws are you in a position to change or improve enforcement of? Are you or members of your organization in elected office? Or in positions within city/state agencies? Do you have a union? How good is your contract?

Form of Power	Definition	Factors to Consider
Economic	The ability to control what is produced, distributed, consumed Ownership/control of wealth, factories, land, machines, labor, and other resources needed to produce goods and services to sustain the economy	What jobs do you hold? Are you able to stop the production, distribution, and transportation of goods and services? Do you have strike funds? Do you have savings? Are you able to run your own production and services?
Military	Control of armed forces Control of police	Knowledge of police infiltration and de-escalation tactics Are you able to defend yourselves and your community; for example, through nonviolence training?

Tool 8

Writing a Powell Memorandum for the Left

In 1971, Lewis Powell wrote a memo to the U.S. Chamber of Commerce, laying out a thirty-year plan for corporate power. Powell's central concern was restoring the hegemony of the free-market capitalist ideology and weakening its opponents.

1. Have everyone read the Powell memo (available in many places online).
2. Break into small groups of approximately five people. Your task is to begin writing a Powell memo for the Left.
3. Discuss:
 - What is the central thrust of your “Powell memo”—your thirty year plan for the Left? (Powell was trying to restore the dominance of free market ideology; what is your goal?)
 - Thinking as Powell does about movement infrastructure, what specific institutions might you try to take over, build, or destroy?

For example: Delegitimize a major conservative media outlet? Capture the Democratic Party? Take over the state legislature, and if so, where? Recruit churches back to the Left? How? Which ones? How would you engage schools and universities in your plan? Would you try to divide the opposition? For example, break small business from big business?

- To whom would you write the Powell memo for the Left?

4. Report back to the large group using the following template:

Our long-term vision is:

Our memo is addressed to:

Three key elements of our thirty-year plan are:

1.

2.

3.

Tool 9

New Grooves: Application of the Seven Models

The goal of this tool is to open up your thinking to alternative ways of addressing an issue from other traditions of social change.

For example, if your default approach is to think in terms of base-building, you would look at one of the other seven models for transformative change (perhaps the one we find most unfamiliar or challenging) and play out what it would look like to approach the situation from that framework.

If the issue we wanted to change was the crisis of affordable housing, displacement, and gentrification in a big city, we might do the following:

1. Look at how to build a mass citywide tenants organization (basebuilding).
2. See how to spark or add fuel to the fire of a rent-strike movement to force landlords into concessions (disruption).
3. See how to design a campaign to challenge the dominant story about housing in favor of an alternative story, and to move public opinion in that direction through communication strategies, cultural work, and dramatic action (narrative shift).
4. Define a strategy to “electoralize” affordable housing— through a ballot initiative or by getting a candidate to run on a bold housing platform in a primary against an established, high-profile incumbent (electoral change).

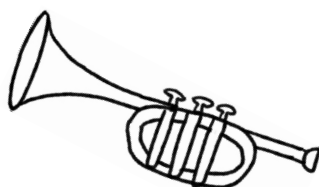
5. Develop a legislative campaign for affordable housing through the city council that is at the “left edge of the possible” and develop campaign plans to move key swing legislators whose votes are needed to win (inside-outside campaign).

6. Develop a bold north star goal, create a polarizing fight to galvanize active supporters, and create training and pathways to support large-scale distributed action to move the “common sense” on the issue and shift support in key pillars of society for the demand (momentum).

7. Create a mutual aid network for tenants in which tenants provide help to each other in addressing the challenges they face as a pathway to recruit and politicize more people (collective care).

Using the New Grooves tables as guides, first sketch out how you’d address the issue using the logic of the model most familiar to you. Then, describe how you would develop a strategic response using an unfamiliar model.

At the end, note any insight you gained that could apply to your current work.



New Grooves Key Components of Seven Strategy Models (Part 1)

Strategy	Form of Power	Theory of Change	Examples of Practitioners & Theorists
BASE-BUILDING (COMMUNITY)	Solidarity	Lots of people, acting in solidarity, with discipline and for the long term → pressure politicians, corporations, landlords, or institutions to make change	Ella Baker, Saul Alinsky, SNCC, Cesar Chavez, IAF, ACORN, Charles Payne, Theda Skocpol, Aldon Morris, Hahrie Han
BASE-BUILDING (LABOR)	Solidarity	Lots of workers, acting in solidarity, with discipline and for the long term → pressure employers and politicians to make change	A. Philip Randolph, William Z. Foster, Mary Harris, “Mother” Jones, Rose Schneiderman,,, John L. Lewis, Emma Tenayuca, “Big Bill” Haywood, Lucy Parsons, Flint sit-down strikers, (most labor unions begin with a base-building model)

Protagonists & Structure	Goals and Methods
▪ Organizers ▪ Elected leaders ▪ Members Representative ▪ Usually formally democratic structure	▪ Demands are usually specific, immediate, winnable(they can be more ambitious) ▪ Issues are chosen and defined in terms of member self-interest ▪ Recruitment of new people ▪ Listening session ▪ Membership due ▪ Democratic participation ▪ Systematic leadership development
▪ Members ▪ Shop stewards ▪ Elected leaders ▪ Organizers ▪ Representative and usually formally democratic structure	▪ Demands are specific, immediate, winnable (though can be more abstract) ▪ Issues are chosen and defined in terms of member self-interest ▪ Recruitment of new people ▪ Membership dues ▪ Democratic participation ▪ Systematic leadership development

Strategy	Form of Power	Theory of Change	Examples of Practitioners & Theorists
DISRUPTION	Disruptive	Underdogs willing to take risks → stop the functioning of an oppressive system → create a moral, economic, and political crisis → demands are met	Rev. Wyatt Tee Walker, Johnnie Tillmon, Frances Fox Piven, Lisa Fithian, Bayard Rustin, SNCC, Communist Party in the 1930s, ACT UP, W.E.B. DuBois, disability rights movement (ADAPT)
NARRATIVE SHIFT	Ideological	Storytelling, creative direct actions, and communication strategies grounded in organizing → Make a “far out,” unpopular, or politically unfeasible idea part of the new common sense	Occupy activists, Cristina Jimenez, Alan Jenkins, Rashad Robinson, Anat Shenkar Osario, Opportunity Agenda, Race Forward, marriage equality movement, immigrant youth movement
ELECTORAL CHANGE	Political	Change the “common sense” about an issue or problem; culture change Storytelling by directly impacted people; pop culture; creative actions; media and communications; organizing; education	Anthony Thigpenn, Nsé Ufot, Maurice Mitchell, Democratic Socialists of America, Bayard Rustin, Community Change Action, UNITE HERE

Protagonists & Structure	Goals and Methods
Disruptive movements: poor or other marginalized people for whom conventional methods haven't worked; loosely coordinated and under no one's control; organizations may fan the flames Disruptive campaigns: planned by organizations	▪ Focus on disrupting an oppressive system and forcing concessions from overdogs who respond out of fear or economic stress ▪ Does not require majority popular support to succeed ▪ Loose network of activists connected to movement hubs ▪ Growth through energy, passion of actions, evidence of success
Movements that emphasize storytelling Activists, cultural workers, media, artists, communications-based organizations, educators, journalists	▪ Change the "common sense" about an issue or problem ▪ Culture change ▪ Storytelling by directly impacted people; pop culture ▪ Creative actions; ▪ Media and communications; ▪ Organizing ▪ Education
Organizations engaged in integrated voter engagement Parties and partylike organizations and coalitions	▪ Taking government power through elections to achieve major social change ▪ Build a political power base through elections, rather than focus only on electing candidates ▪ State or national organizations engaging in year-round organizing and electoral work to connect issues and elections

Strategy	Form of Power	Theory of Change	Examples of Practitioners & Theorists
INSIDE-OUTSIDE CAMPAIGNS	Solidarity Political Ideological	Diverse coalition of groups with a large social base + allied policymakers craft a bill “on the left edge of the possible” + campaign to organize legislators + luck of a political opening → policy change	Heather Booth, Pramila Jayapal, Frances Perkins, Health Care for America Now (HCAN), Midwest Academy
MOMENTUM	Solidarity Disruptive Ideological	Polarizing campaigns that attract thousands of people inspired by a compelling vision → challenge institutions that uphold a social consensus → change the common sense and make big policy victories possible	Sunrise Movement, Movement for Black Lives, Gandhi, Momentum.org , Mark and Paul Engler
COLLECTIVE CARE	Solidarity Ideological	Mutual aid/support, healing, meeting urgent needs → allows more people to participate in organizations/ movements, take greater risks + changes people’s identity and sense of agency + prefigures alternatives → new openings and horizons for social change	Harriet Tubman, Ella Baker, cooperative movement, mutual aid Cara Page, Kindred Southern Justice Healing Collective, Mia Mingus, Dean Spade, Deva Woodly

Protagonists & Structure	Goals and Methods
Progressive elected and appointed officials working with outside organizations and coalitions to enact major social policy reforms	▪ Win a concrete, major policy reform in the medium term, when the balance of forces is nearly equally divided ▪ Coalition building; ▪ development of specific policy goals and targets; ▪ orchestration between “insiders” and “outsiders”
A central movement hub that coordinates a broad network of activists engaged in distributed organizing with a shared goal	▪ Make a big, overarching policy change that is not winnable in the short term possible in the future ▪ Harness or create a “whirlwind” of mass action through polarization—create a platform for distributed action to weaken the “pillars” holding up the current social consensus
Organizations, volunteer networks, and movements that prioritize the physical, economic, and emotional wellbeing of people affected by injustice and trauma, connected to a larger vision for transformative change	▪ Meet immediate needs for survival and well-being; ▪ build a network of mutual aid, tapping creativity. ▪ Participants’ sense of agency and identity shifts over time; ▪ can be a path to movement recruitment; political and policy solutions emerge organically

New Grooves Key Components of Seven Strategy Models (Part 2)

Strategy	Tactical Repertoire	What Does Winning Mean?	Time Horizon + When The Model Is Most Effective
BASE-BUILDING (COMMUNITY)	Accountability sessions; direct action; strikes; negotiation with targets Discipline and carefully orchestrated, planned actions	Demands are wholly or partly achieved; organization is stronger at the end of the campaign than at the beginning and gets “credit” for the win	Evergreen, but especially useful in slower periods in movement cycles, laying the groundwork for political opportunities or movement upsurges “Trench warfare”—change mostly comes in small increments over time Seeks to establish permanent institutions
BASE-BUILDING (LABOR)	Shopfloor direct action, collective bargaining, strikes, lobbying, political engagement	Demands are wholly or partly achieved; successful election for union representation; win a collective bargaining agreement; social change for the working class	Evergreen, but especially useful in slower periods in movement cycles, laying the groundwork for upsurge in worker organizing and action “Trench warfare”— change mostly comes in small increments over time. Seeks to establish permanent institutions

How it works with other Models	Strategies and Weaknesses
▪ Works well with electoral change and inside-outside campaigns ▪ Relies on disruptive movements for exponential growth and on collective care for sustainability ▪ Less history of combining it with narrative shift and momentum	▪ Concrete wins that improve people's lives; ▪ Builds grassroots leadership; ▪ Can engage in struggle over years ▪ Can be slow and plodding, or focus narrowly on the interests of existing members, and on small local issues to the exclusion of bigger, systemic issues
▪ Works closely with electoral change and inside-outside campaigns; ▪ relies on disruptive movements for exponential growth and on collective care for sustainability; ▪ less history of combining it with narrative shift and momentum. ▪ Some unions were formed out of collective care and some have attempted to revive this	▪ Concrete wins that improve people's lives; ▪ builds worker leadership; ▪ can engage in struggle over years, can build powerful institutions that have great impact on society ▪ Can be slow and incremental, focused narrowly on the interests of existing members, bureaucratic, undemocratic and corrupt; ▪ at times works to reinforce the status quo against other underdog movements

Strategy	Tactical Repertoire	What Does Winning Mean?	Time Horizon + When The Model Is Most Effective
DISRUPTION	Mass unruly protest, occupations of workplaces/ public spaces/ buildings, workplace strikes, “wildcat” strikes, rent strikes; May be stealthy, as with the general strike of enslaved people; Disruptive movements can be wild, unpredictable, and edgy; Disruptive actions can be planned and disciplined	Mass disruption and civil unrest result in major concessions from elites to restore order	During “ruptures” when the dominant system is faltering and/or in times of rapid economic, demographic, or technological change. Change comes in dramatic, fast bursts of action.

How it works with other Models	Strategies and Weaknesses
▪ Depends on organizers who lay groundwork ▪ Electoral openings may help them succeed. Tension between majoritarian focus of electoral strategies and emphasis on polarization of disruptive movements ▪ Can have elements of narrative shift and can shape political agendas ▪ Often clashes with inside/outside campaigns ▪ Can benefit from collective care work for survival (e.g., strike support or a bail fund) ▪ Benefits from other strategies to win popular support to make them less vulnerable to backlash (narrative shift, momentum)	▪ Can deliver big changes quickly ▪ Can demand people take great risks ▪ Concessions from overdogs are unstable; gains often followed by backlash ▪ Some people motivated by immediate needs leave the movement once needs are met

Strategy	Tactical Repertoire	What Does Winning Mean?	Time Horizon + When The Model Is Most Effective
NARRATIVE SHIFT	High-visibility actions that capture attention Bold demands/slogans that shift the debate Use of pop culture and media	Shifting the common sense and moving the Overton Window of possibility	When a deep, long-term shift in norms and values is needed May unfold quickly, during a rupture when people are open to an alternative; Or slowly, by planting the seeds for a new common sense
ELECTORAL CHANGE	Large-scale voter mobilization by a permanent organization that works yearround on issues; Running or endorsing candidates for office; Changing laws and regulations; Ballot initiatives;	Capturing governing power, enactment of a governing agenda, growth in membership of the political alliance	When the stakes of elections are especially consequential— e.g., to prevent fascist parties from winning Sometimes a slower build Works over multiple election cycles as organizations connect issues to politics, expand their capacity to reach voters, decide elections, and shape policy agendas

How it works with other Models	Strategies and Weaknesses
▪ Can be a big part of momentum and collective care models ▪ Less history of successful integration with base-building or inside-outside campaigns ▪ Some electoral campaigns (like Sanders's) can shift narrative	▪ Can change the popular common sense about an issue in dramatic ways, altering the terrain of struggle ▪ Can be tactical and focus too much on words rather than action; can win the narrative but lose the policy ▪ If disconnected from organizing and from a deep analysis of the conjuncture, it can be an alluring but failed shortcut to progress
▪ Works well with basebuilding and insideoutside campaign models ▪ Newer efforts are incorporating elements of collective care ▪ Tension between majoritarian focus of electoral strategies and emphasis on polarization by disruptive movements ▪ Can be tension between focus on election outcomes and long-term narrative shift strategies	▪ Building electoral power that is independent of candidates and parties can result in big electoral wins that open space for big policy wins ▪ Tensions between a radical vision and what it takes to win electoral majorities; potential limits to what can be won through the existing state. ▪ Limited recent examples of successful progressive governance may discourage consistent participation across cycles that this model requires

Strategy	Tactical Repertoire	What Does Winning Mean?	Time Horizon + When The Model Is Most Effective
INSIDE-OUTSIDE CAMPAIGNS	Campaigns to pressure swing legislators, targeting, counting votes, real-time coordination between insiders and outsiders to adjust tactics	Win policy campaigns delivering social change Ideally also grow the base and shift relations of power through policy feedback loops	When the balance of forces between overdogs and underdogs is closely divided in governing bodies, so that if underdogs target swing legislators they can pass significant policy changes
MOMENTUM	Polarizing actions against targets to create energy Cultural DNA and toolkits established by a central hub with wide latitude for local experimentation and creativity Campaigns may target particular “pillars” that uphold the social consensus	Often after many years of losses, new social consensus is achieved and gets ratified in public policy through the courts or legislation, or there is significant change in political leadership	When a fundamental system change is needed that is not possible now Unfolds over years when an issue needs to be moved from minority to majority support by deliberate campaigns that engage many passionate volunteers

How it works with other Models	Strategies and Weaknesses
▪ Most compatible with base-building and electoral change models ▪ Doesn't typically incorporate collective care (though there are exceptions) ▪ Not always compatible with disruptive movements because of focus on winning majorities ▪ Can conflict with momentum and narrative shift because of its shorter time horizon	▪ Can deliver big policy wins, change people's lives, and sometimes alter relations of power ▪ Won't work if the underlying conditions are absent, which they often are ▪ Compromises can be tough to swallow ▪ Can deplete rather than build power ▪ Turns attention toward policy and policymakers, which can divert focus from powerbuilding
▪ Works well with narrative shift ▪ Strengthened by basebuilding and collective care ▪ A momentum campaign can be an electoral campaign ▪ Can lay the groundwork for insideoutside campaigns, though ambitious goals of momentum driven campaigns ▪ may conflict with more incremental goals of inside-outside campaigns	▪ A deliberate movement building strategy to make the impossible possible, with a strong track record of success. ▪ Momentum campaigns can dissolve when the goal is achieved ▪ Tends to work best for single issues; may not work for all constituencies ▪ The breadth of participation momentum enables needs to be balanced with depth so that local ideas, agendas, and leaders can inform movement strategy

Strategy	Tactical Repertoire	What Does Winning Mean?	Time Horizon + When The Model Is Most Effective
COLLECTIVE CARE	Mutual aid to meet immediate needs; cooperative activity; healing justice to address trauma May support any of the other strategy models (for example, bail funds or strike funds) or function as a dominant note that achieves change by prefiguring alternatives and shifting identities	The physical and mental health, or economic needs, of the constituency in question are valued, respected, and met Creates new possibilities for political or policy change	When the state is unresponsive to crises facing marginalized groups, when political responses are not effective, or when people are feeling despair about the possibility of change and need to see impact at a smaller, human scale When organizations experience internal crisis

How it works with other Models	Strategies and Weaknesses
▪ Fundamental to lasting base-building ▪ Strike funds and bail funds support disruptive movements ▪ Can add depth, richness, and wider on-ramps for participation to all other models, though undervalued	▪ Creates wide on-ramps for large numbers of people to take action, including those who may not be ready to take political action ▪ Can change identities, build self-confidence, and combat despair ▪ Volunteers can experience exhaustion and trauma ▪ Can be a stopgap that lets policymakers/overdogs off the hook ▪ If disconnected from a strategy to challenge unjust structures, will have limited impact

Tool 10

Prompt: Are All Strategies Strategic?

We've argued that each of the seven models can be strategic depending on time, place, and conditions. But you might disagree! We invite you to make your case as to why any of the models are not strategic and can instead distract or derail movements for transformative change. Or, you may want to add a new model.

After using the New Grooves tool (**Tool 9**) to explore the various models, use the Strategic Debate tool (**Tool 21**) to prepare your case as to why a particular model is not, in fact, strategic, or why an additional one should be added.

Tool 11

Leadership Identification

The Leadership ID tool can be used to help develop members as leaders, or junior staff to take on larger roles.

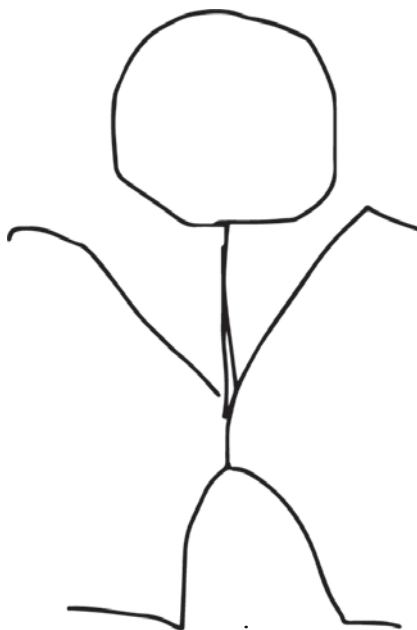
1. Name the explicit and implicit criteria you use to identify who you invest in. Organizers should look for people who are influential in their communities or workplace, rather than for the loudest activists who may not have many followers.
2. Do you see any unconscious biases in these criteria? (gender, race, class, disability, sexuality, or certain personality types or forms of self-presentation to which you react negatively)
3. Bring to mind someone you are consciously investing in or might invest in. Also consider who is reaching out to you for time, ideas, and feedback— is this a sign of potential or a result of privilege?
4. Understanding the whole person: stick figure exercise (see following section).
5. What specific behaviors do they exhibit that speak to our Leadership ID criteria?
6. What small tests might you design to check for leadership capacity? (for example, do they meet their commitments to bring new people to a meeting?)
7. What are the potential leaders' learning edges, and what experiences or training might support their growth?

Understanding the Whole Person: Stick Figure

Who are they?

On the left of the figure, list the variety of roles that the person plays—at work, family, volunteer, civic. What made them?

On the right of the figure, list the experiences and implicit and explicit motivations that drive them.



Tool 12

Collective Care

Oppressed groups often undertake projects of mutual aid or collective care when the state fails to respond to urgent human needs — for example, some of the initiatives during the COVID-19 pandemic. In other cases, people may take on projects to support people taking risks in social movements — for example, the bail funds that were established during the uprising for Black lives in 2020. In this exercise, you will imagine a collective care initiative and explore how it connects to other strategies for social change.

Steps:

1. Define a particular group that you are part of or working with that shares common interests, identities, or needs.
2. Identify the urgent needs in the community that are not being met by the state (such as food, care, or connection). A dialogue with community members is an effective way to generate examples.
3. Brainstorm ways that people in the community who are experiencing these issues could support one another to get those needs met. What community, faith-based, or neighborhood groups already exist that might be worth connecting with? Are there existing institutions that could be utilized, such as a public library, the post office, or public schools?
4. Co-design a collective care effort— what support or training do people need in order to provide or receive help? What technology or other means can you use to coordinate the work and connect people to support each other? What individual resources do you bring to the group?

5. Pilot a collective care program on a small scale. Create simple ways for people giving and receiving help to give feedback.
6. Decide together whether to change, expand, or end the program.

Questions to ask:

1. Can this collective care strategy deepen or expand participation and engage community members who might not participate in other forms of action?
2. Will the work transform how people providing and receiving support see themselves, their capacity, or their identity? How could the work be designed to shift individual and community consciousness? For example, what venues are created for people to co-design the work and try out new ideas? Will people have a chance to discuss how immediate crises are rooted in systemic problems? What rituals are established to evaluate, make meaning, celebrate, or mourn together?
3. How can collective care connect with other strategies for social change? For example, does it allow people to take greater risks when they take action, including disruptive action? Can the information gathered help inform a policy or advocacy agenda? Can the distributed network be used for organizing or electoral mobilization? How could attention to the work change the narrative about the issue or the people involved in addressing it?

Tool 13

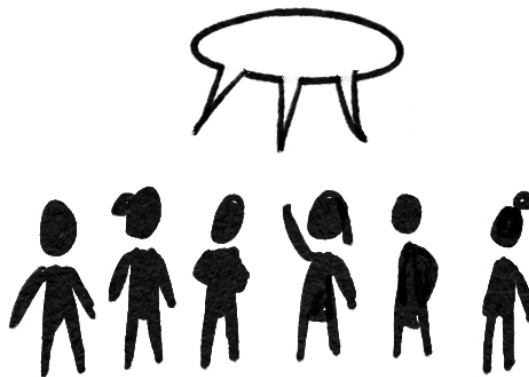
Bargaining for the Common Good

Bargaining for the Common Good (BCG) is an approach to collective bargaining that brings multiple stakeholders into negotiations to fight for broad demands that can have a positive impact on workers and community members.

(See Chapter 6.2 on how the St. Paul Federation of Educators used a BCG approach to raise standards for students, teachers, and parents.) In practice, the BCG process takes several years, and should start by defining common values (**Tool 1**). The tool we offer here can be used in a classroom or workshop setting to help participants learn about the concept. This tool would also work well with **Tools 30** and **33** (Improving the Strategic Capacity of Teams and Power Analysis).

1. Have each participant review the Concrete Examples of Bargaining for the Common Good for background (www.bargainingforthecommongood.org)
2. Set up small groups so that there are representatives from each stakeholder group (for example, each small group should have one or two members from the union, student groups, environmental groups, housing groups, or whoever is in the room).
3. Assign one group member to facilitate and another to take notes.
4. Each member of the small group should share the following information:
 - What are one to three demands your group is working on?
 - Who is your main target?
 - Do you have indirect targets?
 - What is the main form of power you bring to the campaign?
 - What is the timeline for your campaign?

5. Once each member has shared, discuss the following in your small group:
 - Can you find overlapping demands?
 - Can you find common targets (direct or indirect)?
 - Can you align your campaign timelines?
6. Reconvene in a large group and share ideas to see if you can come up with two or three collective demands, a common target, and a tentative campaign timeline.



Tool 14

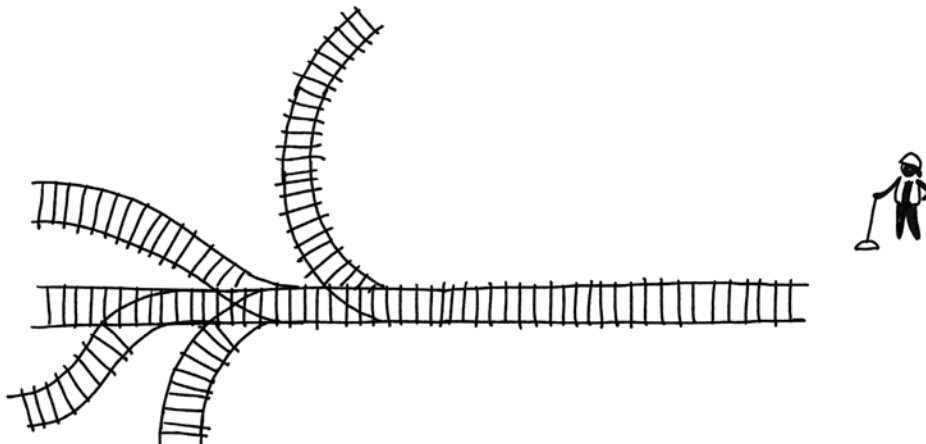
Resource: Holistic Strategy Development

- Emergent Strategy Ideation Institute, <https://esii.org/>
- U-School for Transformation, “Theory U,” <https://www.u-school.org/aboutus/theory-u>
- Deepa Iyer. 2022. “Social Change Ecosystem Map.” Building Movement Project. <https://buildingmovement.org/wp-content/uploads/2022/04/Ecosystem-Guide-April-2022.pdf>

Tool 15

Disruptive Chokepoints

All systems have vulnerabilities—chokepoints—places where a disruption would slow, wound, stop, or threaten the functioning of the whole system.



Disruptive power includes the following:

- Identifying the vulnerabilities in a system or opponent (chokepoints or bottlenecks)
- Assessing who has access to those vulnerabilities
- Developing a plan to shut down the chokepoint

Steps for disruption:

1. Start with your campaign or issue and think about the people, systems, and structures that enable the status quo to function.
2. Create research teams to research each of the following, looking for chokepoints.

Production and distribution:

- How is the product or service created? What is the flow of inputs and outputs? (think of factories, warehouses, distribution centers)
- How and where are products shipped to sell?
- How and where are services created and provided?
- Who are the suppliers and distributors that buy or sell related products or services?
- What are the rules and regulations that govern the industry and the distribution of its output? (for example, environmental laws that dictate how it can operate, trade regulations that determine where it can get its inputs)

Flow of money:

- Who invests or loans money? What debts are owed?
- How are people paid? (employees, suppliers, creditors)
- What are the rules and regulations governing the debt?

Flow of information:

- Where do people find out necessary information? (Consider everything from word of mouth to independent media and culture to corporate media and culture.)
- Who controls the production of information?
- Are there rules and regulations that govern production or distribution of information?

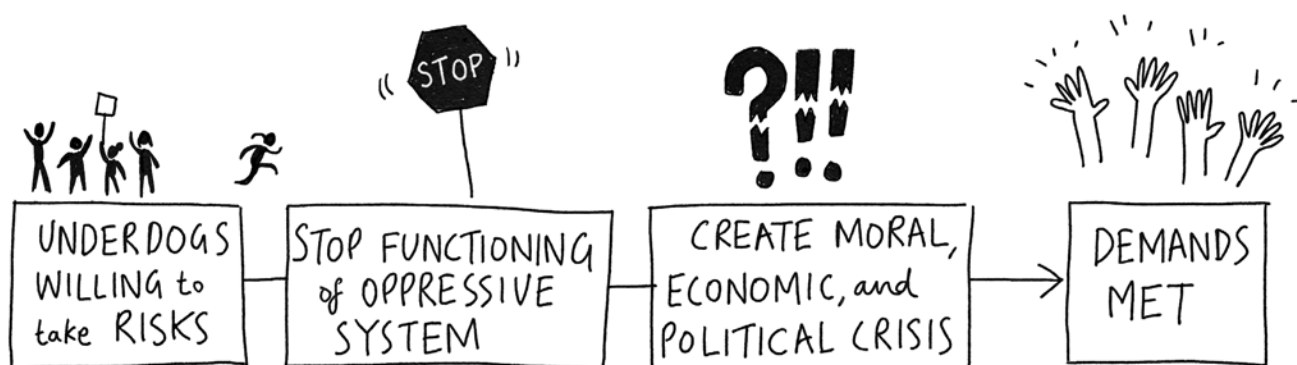
Reproduction:

- What are the social reproductive systems that allow the system to function? Who takes care of children? Who feeds people and provides housing and care?
- How and where is health care provided?
- What emotional labor is needed to keep the system running?

Social norms and customs:

- Are there social norms and expectations that keep the system running?
- Are there unwritten rules that most people tend to abide by?
- Are there cultural practices that are considered subversive?

3. Once you have identified chokepoints, identify who has access to those chokepoints. For example: We know that several of the world's largest ports are in China; that most banks need their transactions to go through a single organization in Belgium; and that the digital cloud is not dispersed but located in a few key storage facilities. Disruptive power requires identifying not only the chokepoint, but the people who have access to those chokepoints (workers, investors, coders, etc.).
4. The general rule is that the more people required to shut down or close off a chokepoint, the harder it is to disrupt. Strategically, we have more power with chokepoints that can be shut down with fewer people, particularly if those people are not easily replaceable.
5. Go through your list of chokepoints and determine who has access. Is it someone in your coalition? Is it someone you can build an alliance with?
6. Develop a plan. For the chokepoints to which your group or coalition has access, discuss the steps it would take to shut or slow down the system. How would you actually disrupt?



Tool 16

Prompt: Organizations, Movements, and Times of Upsurge

There are periods of history when large numbers of people are moved to take action to address injustice—think of the uprising for Black life in 2020, the immigrant rights marches of 2006, or the movements of workers and tenants in the 1930s.

How should organizations with membership respond in such periods? Activist-scholar Frances Fox Piven argues that a classic mistake is to think organizationally rather than in terms of movement during upsurges. She argues that community organizations and unions should not try to capture the energy of movement upsurges; for example, by signing up members.

Instead, she says, they should do everything they can to amplify, support, and spread the activity. That might involve setting up strike funds or bail funds to provide support for people taking big risks, encouraging members to show up in support at big actions, or offering training in basic leadership skills, like how to run large meetings. It can also mean helping to spread the disruption to other cities or constituencies. Others argue that it's important to have a strategy to consolidate organizational power gains in times of upsurge to implement gains (for example, by winning unions at peak times in worker insurgencies) to defend against backlash to continue work in the slow times between movement upsurges.

Discussion questions:

- Think of a recent crisis or period of upsurge (for example: the COVID- 19 pandemic, popular mobilization in response to police violence, Trump's effort to reverse the outcome of the 2020 elections). How did your organization respond? Is there something it could have done differently? Why did it respond the way it did, and what political and power factors were/are at play in the organization?
- What crises can we imagine could happen in the coming five years? (Wars, recessions, climate disasters, police violence, another pandemic?)
- When the next crisis hits, where will people turn for help? Is your organization in a position to help? Does your organization have allied groups that can step in? What would it take to get your organization ready to respond?
- When people want to act, who will give them something to do other than donate?
- To whom will the media turn to make meaning of the moment?
- Do you want them to turn to your organization? Why / why not? If you do want them to turn to your organization, how will you put yourself in that position, and what will your message be?
- Will your organization's posture be to spread and support the disruption or to try to institutionalize gains?

Tool 17

Tabletop Exercise: The Worker Upsurge

This is a discussion-based exercise in which key people in power adopt roles and practice responding to a specific scenario. It is often used in disaster preparedness—for example, to help a team of first responders imagine what could happen and what they would do. It can also be used to test how a group responds under pressure, including its creativity.

In some versions of tabletop exercises, a group leader (or “game master”) will ask a team to work together to come up with responses to a given situation. In other cases, like the following example, different team members are assigned different roles—including allies and opponents—to illuminate the different ways that other actors could respond to a situation.



Scenario Example

Thousands of low-wage, service-sector and fast-food workers, overwhelmingly people of color, take militant action to demand a union in a mid-size southern city. The city has a conservative corporate establishment, a Democratic city government, and an increasingly far Right Republican state government. The spark for the upsurge is unclear. Many factors have contributed to lay the groundwork, including the following:

- Worker leadership has been cultivated by unions and community groups, including through the Fight for \$15.
- Police killings of Black people have put thousands of people in the streets, giving people experience with direct action.
- Widespread reports of health and safety violations during the pandemic have galvanized workers to take action in specific worksites.
- A tight labor market has given workers a greater sense of power.

International unions and local community groups are supporting the workers' actions, but they are not in control of the situation. Thousands of workers have now engaged in rolling strikes, moving across different sectors of the low-wage economy. Workers are not showing up for days at a time, creating a meaningful disruption for employers, though the strikes are not yet sustained. The story is on the front page of local newspapers and has begun to inspire similar action nationwide.

Like Justice for Janitors in Los Angeles or the Hormel strike, the worker upsurge has inspired widespread public sympathy for the workers as their stories are shared in the media. People, especially young activists around the country, begin to travel to the city to volunteer. A national strike fund to support the workers is organized. Faith, racial justice, and other civil society groups begin to rally around the cause.

The workers are demanding not only better pay and working conditions, but also a union and collective bargaining agreements. The intensity of the worker action catches local overdogs offguard. After a couple of months of sustained disruption, you're at a tipping point.

How the following players respond to the upsurge will play a critical role in determining its future.

Groups

1. The corporate leadership of the mid-size southern city.

2. National companies with operations in the city.

Examples of possible responses of Groups 1 and 2:

- Try to defuse the protest with a wage increase
- Hire replacement workers, fire people
- Ask the police to repress

3. The Democratic political leadership in the city.

Examples of possible responses:

- Try to broker peace
- Pass policy in city council
- Tell the workers and unions to cool it

4. The far Right Republican governor and state legislature.

Examples of possible responses:

- Racialize the debate and try to divide workers
- Preempt local policy
- Threaten corporations that want to settle
- Bring in the National Guard

5. Local union and community organizing group leadership.

Examples of possible responses:

- Sign up members
- Turn out members to actions, organize support
- Help spread the action to other worksites and in the community

6. National unions, community organizing, racial justice, and other progressive infrastructures.

Examples of possible responses:

- Organize a strike fund
- Spread the uprising to other cities
- Send volunteers

7. Workers organizing committee of striking low-wage workers

- They've gotten notice—what do they do next?

Some of these groups are broad categories, and you might take note of tensions within the group.

Your Task

In your small group, identify two to three options for how your actor (far Right Republican governor, corporate leadership, etc.) could respond. Then choose one “play”—a specific action you will take in response to the workers’ upsurge and be prepared to explain why you chose the play and what impact you expect it to have.

(The Workers Organizing Committee has a slightly different task, since they will have already made their “play” with the upsurge. Not knowing what the institutional leaders are planning, their task is to plan the next round of escalation.)

You don’t need to know labor law technicalities: these are situations in which the law is less relevant. You should designate a reporter, and each group should come back and present its play, why they chose it, what

impact it will have, and why that play is going to work.

Next Step in the Game

Each team will present its “play” to the full group. The other teams will weigh in. If need be, the facilitator should roll dice to decide whether the play has the desired impact. After all the groups have had a turn, the facilitator resets the game with a new scenario, taking into account the impact of all the previous actions.

Time permitting, you can do a second scenario and a second round of plays.

Hot Wash: Evaluate the exercise.

What did everyone learn?

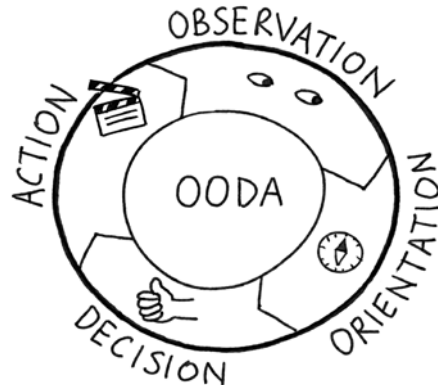
What surprised them?

What lessons can they carry forward? For example, what mistakes might they avoid, and what ideas show promise?

Tool 18

OODA Loops

Answer the following questions with respect to a specific opponent.



1. What are the implicit filters your opponent is bringing to the situation—including ones that may be unconscious? For example, do they operate from a sense of overwhelming confidence in their dominance, or are they insecure, or even paranoid?
2. What past experiences might shape how they see current events? For example, how have they defeated previous opponents?
3. What information might they NOT see now that you do? For example, about discontent within the ruling coalition or rising anger among underdogs?
4. What actions, based on prior experience, are they expecting from you? For example, do they expect protests or demonstrations? Have they prepared extensively for a certain kind of critique?
5. What actions would disrupt their OODA loop because they won't be able to make sense of the action using past experience as a guide? Or

because they will misinterpret the action, resulting in a poor decision? For example, would a new constituency joining your coalition or a defection from the ruling bloc to support your position rattle them? What about a fresh tactic?

6. Speed: What three things could you do in fast succession that would freeze or distort their decision making or prompt a ham-handed response that would itself create opportunity? For example, perhaps instead of just a typical protest, what if there was a protest, followed by a disruptive action, followed by an announcement of support for your position by an unexpected ally, followed by release of a critical investigation by a friendly reporter?
7. What actions could you take that would demoralize your opponent? For example, how could you use humor and mockery to throw them off balance?
8. What implicit filters are you bringing to the situation that may be blinding you to opportunities? For example, do you assume the ruling coalition can't be divided, so that all of your energy is focused on building the base? Or, do you assume that negative press coverage will have an impact on the target despite evidence that they have ignored it in the past?
9. What research about your opponent could you do to deepen your analysis?

Quote

Demoralization: "to break the spirit and the will of the enemy command by creating surprising and dangerous operational and strategic situations."

– John Boyd

Tool 19

Resources: Narrative Shift

Several organizations offer training, consulting, and toolkits for narrative shift work. We list a few to start with.

Opportunity Agenda

- “Vision, Values, and Voice: A Communications Toolkit,”
<https://www.opportunityagenda.org/explore/communications-toolkit>

Narrative Initiative

- “Developing Your Organizational Voice Worksheet,”
<https://narrativeinitiative.org/resource/developing-your-organizational-voice-worksheet/>
- “Who-What-How: Narrative Strategy for Issue Campaigns,”
<https://narrativeinitiative.org/resource/who-what-how-narrative-strategy-for-issue-campaigns/>

Race Forward

- “Butterfly Lab Narrative Design Toolkit,”
<https://www.raceforward.org/practice/tools/butterfly-lab-narrative-design-toolkit>



Tool 20

Prompt: Electoral Work



In small groups, discuss the following:

1. Can you share an example of when you used electoral work well?
2. Is there an example of when it was used poorly?
3. What makes electoral work more or less strategic?

Discuss as a group. Consult the following table and discuss it as well. Do you agree with the chart? Is there anything you would change or add? How does it compare with the electoral work you have done or seen?

Some Guidelines for Using Electoral Work More Strategically

Less Strategic	More Strategic
Focus on a candidate	Focus on broad social change goals
Raises money, builds infrastructure for one candidate	Builds independent organizations and movements
Get-out-the-vote is the main priority	Deep canvassing; conversations about worldview; connects people to organizations
Focus on likely voters	Includes nonvoters, infrequent voters, and involves people who can't vote (because of immigration status, convictions, or age)
Goal: elect a candidate	Goal: build governing power
Effort ends on election day	Plans for continued work on accountability, support for progressive electeds

Tool 21

Strategic Debate



This tool is intended to help develop the skills of formulating an argument for a strategy and engaging in productive debate.

In this exercise, you won't have access to all the information you would need in real life to create a grounded proposal, so the emphasis is more on learning to present a position and discuss it, as well as on learning to push others in your group to refine their thinking.

You can use this tool in a variety of ways. For example, we've used it to have groups debate strategies to organize workers into unions, assuming they are in the organizing department for a major union. Here, we present a scenario related to elections.

For this exercise, assume you are in the leadership of a large community organization based in a swing state. You have won gains at the local level but face barriers on what you can win without winning more at the state level, and you know your members are at risk of harm due to federal policy. Your organization wants to build a ten-year plan for its electoral strategy.

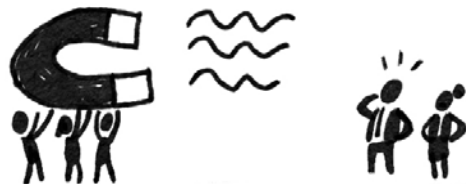
1. Divide into five small groups. Assign each group one of the following strategies:
 - Influence the existing main political parties (e.g., push the Democratic Party to the left by challenging incumbent Democrats in primaries).
 - Build an independent party (e.g., a fully independent Green Party or the fusion model represented by the Working Families Party).
 - Promote issues rather than candidates (e.g., a ballot initiative or state law to raise the state minimum wage or change electoral process rules like campaign financing).

- Take over the Democratic Party apparatus in a region or state.
- Build state power through year-round voter mobilization, community organization, expansion to new areas in the state, and policy work (e.g., California Calls, New Georgia Project).

Your task is to develop a case as to why this is the best strategy. Discuss the factors that are relevant in choosing a strategy. How will you accomplish your strategy? If you need information that you don't have, you might consider how you would get that information.

2. Choose someone to present to the group: What strategy does your group propose, and why? Consider the following factors:

- Vision: What is the end goal?
- Power from above: Who is the target, and what are their sources of power?
- Power from below: What sources of power do you have? What sources could you gain if you build alliances?
- The moment": What is the balance of forces? What are the current conditions and potential openings? With whom can you make compromises, and should you?
- Your theory of cause and effect: If you do X, what will happen?



Tool 21

Policy Feedback Loops

Policy feedback loops durably reshape the distribution of power in society. They strengthen or weaken opposing social groups, alter people's relationship to government and their social identities, and create new openings for further reform.



Common examples are policies that expand or restrict voting rights, or laws that make it easier or harder for workers to form unions.

Policy feedback loops work by changing:

- The resources, identities, and behaviors of individuals in the public (e.g., citizenship); or
- The capacities and resources of government agencies / the state; or
- The power, strategies, and goals of interest groups, social movements, and private-sector businesses; or
- The political agenda: what issues are front and center for the public and policymakers?

Steps:

1. Pick a specific area of policy; for example, labor, housing, policing, immigration, income support, racial justice, reproductive justice. Then, pick a specific arena for contestation: city, state, or federal.
2. Identify current policy proposals that you support.
3. Identify ways that policy proposal could be modified to create feedback loops and do one or more of the following:
 - Strengthen or weaken the power of particular social groups
 - Change people's consciousness or identity
 - Change the capacity and resources of the government
 - Redefine a political agenda

It may help to think about how you would measure these outcomes. For example, how will you know if the power of a particular group has grown? How will you measure a change in consciousness? What kind of resources would you hope to grow within the government?

4. If you were to win and have the policy and the feedback loop in effect, what additional policy shifts might be possible that are not possible now?
5. How would you sell the policy proposal to elected officials, other stakeholders, and your own social base? Would you talk about the power-shifting impact of the proposals explicitly because it would make certain groups more likely to support it? Or would you downplay that impact to avoid antagonizing certain groups, and emphasize its merits on other grounds?

Goal	Policy Components to Meet This Goal	Measures of Success
Increase power of your constituency, organization, or coalition		
Decrease the power of your opponents		
Change people's consciousness or identity		
Increase the capacity or resources of government to do X		
Change the political agenda		

Tool 23

Structural Reforms

Identify a specific issue area (such as income, wages, housing, health care, childcare, education, immigration, policing, or racial justice) or a corporate or worker rights campaign that you are part of now or are thinking about.

Pick a demand that is getting attention in the public discourse or being considered by policymakers (like “cancel rent,” refundable child tax credits, higher minimum wages, the Green New Deal, the PRO Act, reparations, legalization of undocumented immigrants, universal childcare, or Medicare for All). Keep in mind that you are not evaluating the demand from the perspective of whether it’s substantively the most radical demand you can make. Rather, you are assessing it based on the current state of discourse and social forces and asking the following questions:

1. How does the reform demand fit into a longer-term vision?
(Tool 36: Long-Term agenda)
2. Would the demand, if achieved, prefigure an alternative to the existing system? How?
3. Does it challenge the prevailing “common sense” about the issue, how it is best addressed, and by whom? How?
4. Does making the demand or achieving the demand help working-class or racial or gender justice movements build power? How?
5. Would the demand take power away from your opponents? How?
6. Would the demand shift the role of the state? How?
7. Are there contradictory aspects to the demand? (They may in some respects affirm the existing system and in other ways undermine it. For example, a higher minimum wage both challenges profits and increases the legitimacy of capitalism.)
8. If you answer “no” to questions 2–7, you can conclude that the demand is not a structural reform. How might you modify it to be a structural reform demand?

Tool 24

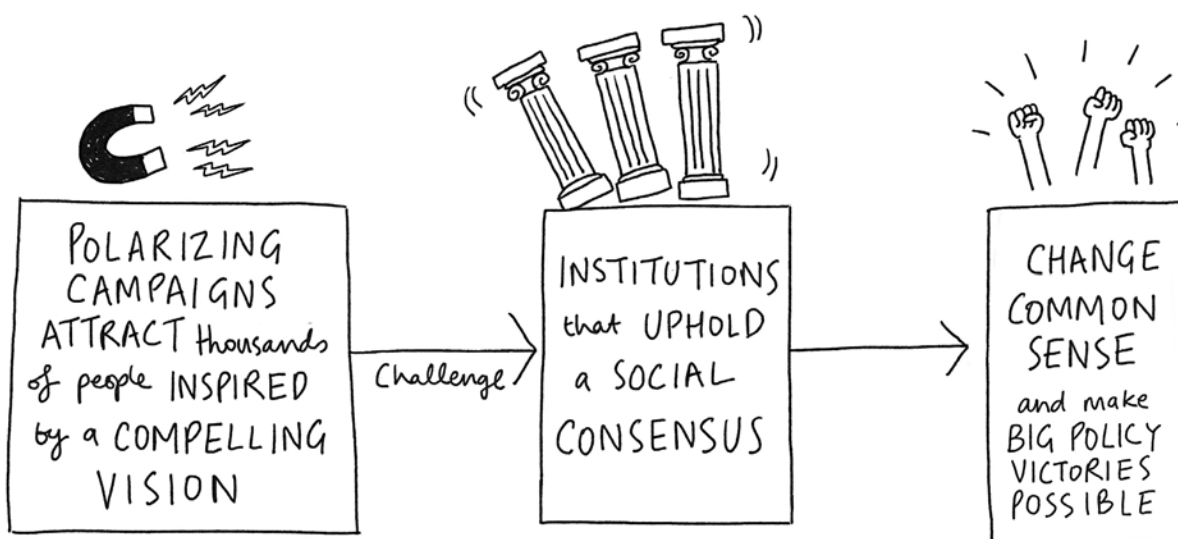
Momentum

1. Pick a big, long-term goal that can't be achieved immediately, but could be won in a five-year time horizon. This could be a big policy idea, like Medicare for All or a guaranteed annual income policy. In other countries, the momentum model has been applied to campaigns to topple a dictator.
2. What diverse social forces could be galvanized to fight for that goal? This would include identifying the potential hard-core volunteer activists who would devote substantial time to the campaign over many years.
3. What big polarizing fight might you create or build from that gathers potential activists together in large numbers? Momentum practitioners call this the “whirlwind”: when lots of people gather for a major rally or demonstration because they are passionate about a cause. You seek to capture the energy for long-term organizing by training a portion of the people mobilized in the big moment.
4. What shared story, strategy, structure, and cultural norms do you want to “frontload” at the beginning of a campaign through mass training, materials, and social media?
5. How can you amplify the work of local activists and share creative actions across the network to inspire them and make them feel part of something bigger?

6. What “pillars” uphold the current social consensus? What can you do to topple them so that your demand eventually becomes mainstream?

For example, LGBTQ+ activists worked to change policies and practices in a variety of sectors: business, the entertainment industry, the military, and churches. When enough of those pillars fell, the social consensus against gay marriage collapsed. Or, how might your campaign help delegitimize a powerful actor, as the divestment campaign sought to do with the fossil fuel industry?

7. What happens if you win? Can you imagine how a victory might lead to an even more ambitious goal?



Tool 25

Resources: Principled Struggle, Generative Conflict, and Unity

The Wildfire Project describes generative conflict as follows: Engag[ing] conflict in ways that generate more possibilities, greater connection, and fuller expression, instead of shutting those things down. This includes both moving past conflict avoidance and unhealthy attachment to conflict.

Generative Conflict

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Engag[ing] conflict in ways that generate more possibilities, greater connection, and fuller expression, instead of shutting those things down. This includes both moving past conflict avoidance and unhealthy attachment to conflict.

Resources:

- Wildfire Project, “Six Elements,” <https://wildfireproject.org/six-elements/>
- Yotam Marom, “Moving Toward Conflict for the Sake of Good Strategy,” Medium. January 13, 2020.
- Mediators Beyond Borders International, “Dialogue and Facilitation,” module created by Ken Cloke, Wendy Wood, and Scott Martin.
- Tess Walshe, “The Art of Argument: How to Have a Generative Conflict,” Slick. November 17, 2021.

Principled Struggle

NTanya Lee explains principled struggle in the following way:

1. We struggle for the sake of building deeper unity.
2. We are honest and direct while holding compassion.
3. We each take responsibility for our own feelings and actions.
4. We seek deeper understanding by asking questions and reading a text (such as an article or proposal) before we launch our counter argument.
5. We look for the right time and place to engage one another (such as in a dedicated session rather than in the middle of a coalition meeting).

Resources:

- See adrienne maree brown, “A Call to Attention Liberation: To Build Abundant Justice, Let’s Focus on What Matters,” Truthout. March 16, 2018.

Building Unity

One of the best places to start on building unity is this important contribution from Maurice Mitchell. There are lots of helpful responses that add to his analysis on the Convergence and Forge websites.

Resources:

- Maurice Mitchell, “Building Resilient Organizations: Toward Joy and Durable Power in a Time of Crisis,” <https://convergencemag.com/articles/building-resilient-organizations-toward-joy-and-durable-power-in-a-time-of-crisis/> Plus Discussion Guide, <https://convergencemag.com/articles/building-resilient-organizations-discussion-guide/>

Tool 26

Prompt: Racial and Gender Equity

No one tool is adequate to address conflict related to race and gender in organizations and movements. Equity is an enormous topic that demands sustained engagement. The following are some questions for your group to unpack sources of conflict and to identify potential paths forward.

1. Are we operating from a shared analysis of structures of oppression and exploitation, such as gender, race, and class? For example, in this book we've been using the historical and conceptual framework of racial capitalism to understand the way inequality arose and persists. There are many frameworks available—for example, a “diversity” paradigm that focuses on whether or not a group's staff or leadership is sufficiently inclusive, or “intersectionality,” which holds that multiple systems of oppression must be considered simultaneously. If your group doesn't have a common framework, does everyone agree you need one, and if so, what process would you use to develop one?

2. What's the relationship between our shared analysis and our work in the world? For example, if we believe racism is a wedge that drives working-class people apart, is the right response to downplay race in our campaign work or to tackle it head-on? Is political education of members needed? New certain strategic alliances?

3. What's the relationship between our shared analysis and our internal work? If we hold feminist and anti-racist principles, is it important that leadership and staff are representative of women and people of color? Why? Might there be legitimate exceptions to this principle, such as a white anti-racist group? Is shared analysis as important as representation? For example, how important is it that white leaders who represent the organization hold an anti-racist analysis? How do our organizational systems, cultures, and practices support full participation by diverse groups?
4. What's the current reality? Is there a gap between our analysis and our practice? What is the nature and extent of the gap, and what are the causes? Are there differing perceptions among different stakeholders and, if so, how might the group come to an agreement on a common assessment of the current reality?
5. What steps might we take to close the gap? For example, do we need to build deeper alignment around the shared analysis? Do we need to clarify roles and responsibilities—for example, for elected leaders, boards, staff (including staff unions), and staff leadership? Are structural or cultural shifts required?*

* This prompt draws on an internal report by Community Change, "A Vision for Racial and Gender Justice," March 2020, and an exchange with Kate Kahan, who was one of the principal authors of that report.

Tool 27

Prompt: Balancing Purpose and Belonging

The movement training institute Wildfire points out that most progressive groups are trying both to instill a sense of belonging among members and to fulfill their purpose of challenging oppressive systems in society. Sometimes these goals can be synergistic. For example, members of a union or community organization who feel heard, seen, and cared for by each other are far more likely to take risks and stick together than those who don't.

However, purpose and belonging can also come into contradiction. For example, if an emphasis on caring prevents a group from having tough conversations about accountability or performance that could generate conflict.

Group members may have different views about whether a group is too inwardly focused (“navel-gazing”) or too outwardly focused (ignoring “toxic internal culture”). This prompt is meant to surface those differences in a way that can be constructively engaged with.

In a group, discuss the following:

1. Define your “community”—are we talking about paid staff, members, or others?
2. Do we agree that purpose and belonging are both important values? Can we each identify occasions in which they have supported one another and times when they have come into conflict? Share some examples in the group.

3. Ask people to spread out in a room, with people on one side believing that the group has focused too much on belonging, and people on the other side who believe the group has focused too much on purpose. Those in the middle can place themselves between the two sides, with some closer to one side than the other. Ask people to share why they placed themselves where they did on the spectrum. What organizational practices or dynamics are they thinking of?
4. Ask people from both sides of the spectrum to engage in respectful conversation (see the principled struggle resources). How would they respond to the points made by the other? Do the differences represent differences in value, priority, or perceptions of reality and current practice? Ask participants to state the other perspective fairly and to note what points they think are legitimate or could be addressed.
5. Debrief as a group. Where are the ongoing disagreements that will have to be managed, and how can the group hold the tension? Is there anything noteworthy about who is on what side of the debate, by virtue of position, role or gender, race, or class, and if so, what meaning do we make of that? Are there places where the group could move toward greater alignment and cohesion? What are some next steps?

Tool 28

Prompt: Practices to Support Individual Creativity and Innovation

You can identify, test, and evaluate practices that “prime the pump” for your best creative thinking. Choose practices that are pleasurable, fit into your schedule, and open you up to new ways of thinking. You can explore with colleagues what has worked for them and how they have integrated the practices into their routines. You might pick one new practice from the following list, try it for a few months, and assess what impact it’s had on your creative thinking.

Deep listening.

How can you practice deep listening—nonjudgmental, complete attention—with community members, allies, or even opponents?

Journaling.

Some people spend fifteen or twenty minutes in the morning writing down whatever comes up as a way to routinely open the channel to what lies below their conscious mind.

Encounters with the unfamiliar.

Everyone risks getting in a rut, talking to the same people in the same circles over and over again. You can establish a practice to introduce unfamiliar material into your mindstream. This might involve setting a meeting every two or three weeks with someone outside your usual network who you find interesting. It could be an architect, a nurse, a neighbor, or a poet. You aren’t trying to “get anywhere,” but rather to understand how they think, work, and create as an end in itself.

Encounters with practitioners in neighboring disciplines.

If you're a community organizer, you might talk with a labor or environmental organizer about a campaign you are working on. Or perhaps you seek out an activist in a different state or even in another country. People who work in a field similar to but also different from yours often have useful and provocative insights because they speak your language but approach problems from another angle.

Unprogrammed time for no activity and radical quiet.

A mind that is always checking off tasks and ruminating about immediate problems is unlikely to come up with breakthrough ideas. Allowing for unprogrammed time—to rest, to meditate, to be still—allows your brain to process information below the level of the thinking mind.

Working with the unconscious.

Some people work deliberately with the unconscious by analyzing their dreams or engaging in creative right-brained activity, like drawing or playing that generates new patterns.

“A room behind the shop.”

French philosopher Michel de Montaigne advised keeping a “private room behind the shop.” This might be a physical place separate from work or home, but what de Montaigne was trying to emphasize is the value of having an activity unrelated to your work—a sport, music, art, craft— that allows you to express your creativity in different ways. There are unpredictable and delightful insights that can come from your hobbies.

Nature and art are touchstones.

For many people, being in nature is relaxing and regrounding, and as adrienne maree brown says, “the natural world is a great teacher if we are fully present in it.” Others find inspiration in art, music, or dance, finding that it changes how they look at the world and opens up possibilities when they return to tackle hard problems.

Reading inside and outside your field of practice.

It’s obvious that reading about other campaigns, new developments, and history in your field can help you see things in new ways, but many of us don’t make this a

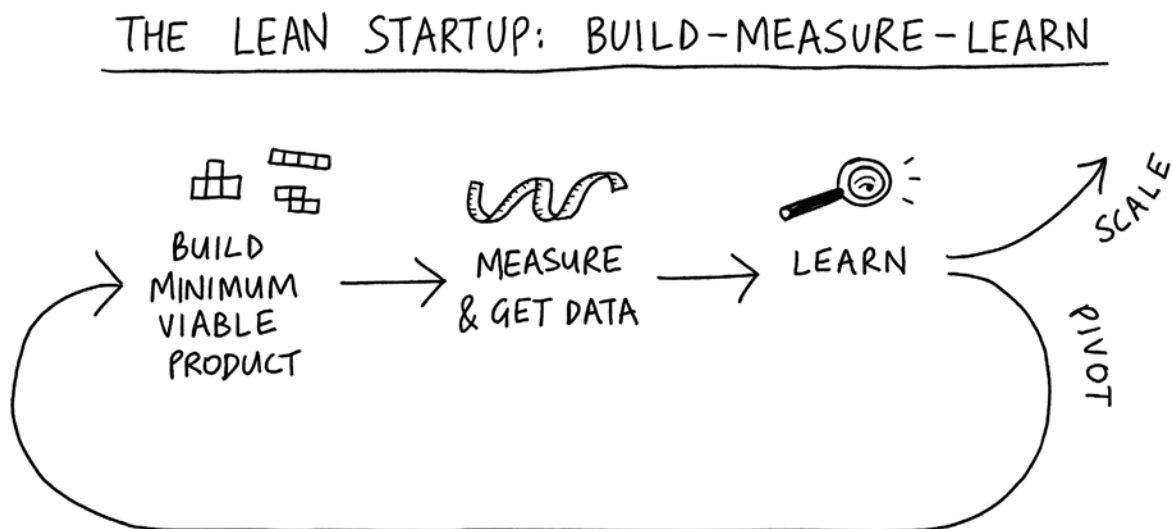
priority. We can also be stimulated by things unrelated to what we’re working on. Many creative breakthroughs come through thinking in analogies, so seemingly unrelated material can be fuel. The proliferation of podcasts, videos, and lectures means that we can take in ideas in ways other than reading.

What matters most is that you adopt a routine that breaks your routines by introducing new material, ideas, and perspectives into your mindstream. Such practices are not luxuries, but essential to become a good strategist.



Tool 29

Lean Startup for Social Change



1. Identify a hypothesis you want to test

Examples might include public housing residents in New York City are ready to build a citywide tenant organization to fight for better conditions; or, if we build a clinic providing immigration services now, we'll be able to grow our membership rapidly; or, if we ally with small businesses we'll be able to change the mind of key legislators on a piece of legislation about gentrification. Build a minimum viable product (MVP) to test your hypothesis.

Rather than build a whole program to fully implement your idea, design the cheapest possible test to see if your hunch is correct. For example, you might take small-business people to visit with two or three legislators—does their attendance have an impact? Or, you might advertise a temporary immigration services clinic providing limited services and see what the response is from the community, and whether people can be converted into members.

2. Measure the results

It's essential to collect data to assess whether your hypothesis is correct. You may find that your hypothesis is wrong, correct, or, most likely, that there's an element of it that is worth building on.

For example, you might do an organizing drive in a public housing development or two, and measure turnout to a public meeting, comparing it to previous turnout. Or, you might see whether including small businesses in a campaign to sway a few target legislators has an impact on their support for the legislation you propose, compared to meetings without small businesses with similarly positioned legislators.

3. Declare failure, move to full-scale implementation, or build a new MVP

Lean startup encourages “failing fast.” We want to rule out unworkable ideas quickly, so we can spend scarce money and time to investigate other ideas. Alternatively, if the hypothesis shows great results, you might move to full implementation. Or, if the results are mixed, you could build a new MVP based on a revised hypothesis.

For example, if you find that there is a weak response to your organizing drive in one public housing development, but a strong response in another, you might look for factors that make the difference— presence of a pre-existing tenants' organization? Conditions in the development?—and develop a new hypothesis to test.

Tool 30

Prompt: Improving the Strategic Capacity of Teams

Strategy is the work of teams. Marshall Ganz identifies five factors that make for a team that is capable of achieving breakthroughs (below). We've added a sixth.

By yourself, or with others, assess the current reality of the team in which you do most of your social change work. As you consider the list of factors, consider the following prompts:

What are the strengths of your team? What could be improved? What cultural habits, practices, or structures enable or inhibit strategic breakthroughs?

Motivation

As Ganz puts it, “commitment to act does not depend on his knowledge of a feasible strategy.” Motivation precedes strategy. When people are deeply committed, they bring more focus, enthusiasm, and persistence. Motivated teams will seek out new ways of doing things and have a greater appetite for risk.

Salient knowledge on the team

A successful team will bring together people with the right knowledge and skills to contribute to solving a problem. Depending on the situation, this might mean people who know a community or constituency well, or people with specialized skills like communications or policy.

Learning practices

High-functioning teams have a reflective practice— they regularly conduct evaluations of their work and learn from successes and failures. They are capable of looking honestly at a situation and learning from divergent perspectives.

Diversity

Teams where everyone comes from the same background, thinks the same way, or knows how to do the same things are not likely to innovate. Groups tend to lose diversity over time, especially in ways of thinking.

Decision-making processes

Open, regular, deliberations that encourage divergent thinking support creativity and good strategy.

Trust

A team where people believe in each other's commitment to the cause, competence, sincerity, and good faith is more able to hold disagreements and make new strategies out of different perspectives.

The P3 Lab at Johns Hopkins University has developed a facilitation guide for assessing the strategic capacity of teams:

https://www.p3researchlab.org/strategic_capacity_blog

Tool 31

Resources: Learning from the Opposition

These are tools developed in business or the military to support good strategy:

- Transformative Scenario Planning: Adam Kahane, 2012.
Transformative Scenario Planning: Working Together to Change the Future. Berrett-Koehler.
- Human Centered Design: [Ideo.com](https://www.ideo.com) and [Ideo.org](https://www.ideo.org)
- Reverse Engineering (**Tool 4**)
- OODA Loops (**Tool 18**)
- Lean Startup (**Tool 29**)
- Tabletop Exercise (**Tool 17**)

Tool 32

Successful Failures

This tool helps develop clarity about campaign goals and outcomes, whether you win or lose. “Successful failures” build for the long term even if we don’t win our campaign (Chapter 17). This tool pairs well with **Tool 4: Reverse Engineering** and **Tool 9: New Grooves**.

Think about a campaign you are working on and come up with measures that would determine whether the campaign was a successful success, failed success, successful failure, or failed failure. We first provide an example:

Outcome	Living-Wage Campaigns
Successful Success You win your campaign, build new leaders, shift the common sense, create new capacity for the next fight	▪ A new coalition is built between labor, community, faith, and student organizations to fight for a living wage ▪ The coalition brings together groups that have not worked together before; leaders and members develop trust and relationships ▪ Workers are brought in to help design campaign demands and strategy; workers and community members are given training in political economy, local politics, and organizing ▪ The coalition wins their demand for a \$20 wage ▪ There is broader public support for worker issues ▪ The coalition has included strong enforcement language and a mechanism for the city to involve worker representatives in enforcing the higher wage ▪ Workers in a few workplaces unionize

Outcome	Living-Wage Campaigns
Failed Success You win your campaign but the win is never enforced, or is watered down to the point that there is no change, you don't build capacity or new leaders, or there is no impact on the common sense	▪ A few union and community leaders lobby the mayor to pass a living-wage ordinance ▪ The ordinance passes ▪ The city has assigned no staff to enforce the law ▪ No workers know about the new law and therefore don't realize they are not being paid their new wage
Successful Failure You lose your campaign, but in the process still manage to build new leaders, shift the common sense, and create new capacity for the next fight	▪ A new coalition is built between labor, community, faith, and student organizations to fight for a living wage ▪ The coalition brings together groups that have not worked together before; leaders and members develop trust and relationships ▪ Workers are brought in to help design campaign demands and strategy; workers and community members are given training in political economy, local politics, and organizing ▪ The city passes a \$20 wage, but the law is overturned by the state ▪ Workers in a few workplaces unionize
Failed Failure You lose your campaign; the campaign does not build new leaders, influence the common sense, or build capacity	▪ A new city council member promises to raise wages to \$20 ▪ There is no meaningful campaign or base-building, no change in public consciousness, and no increase in underdog power The council member introduces the bill but it is stalled in committee

Now, fill out the rubric using potential outcomes for your campaign:

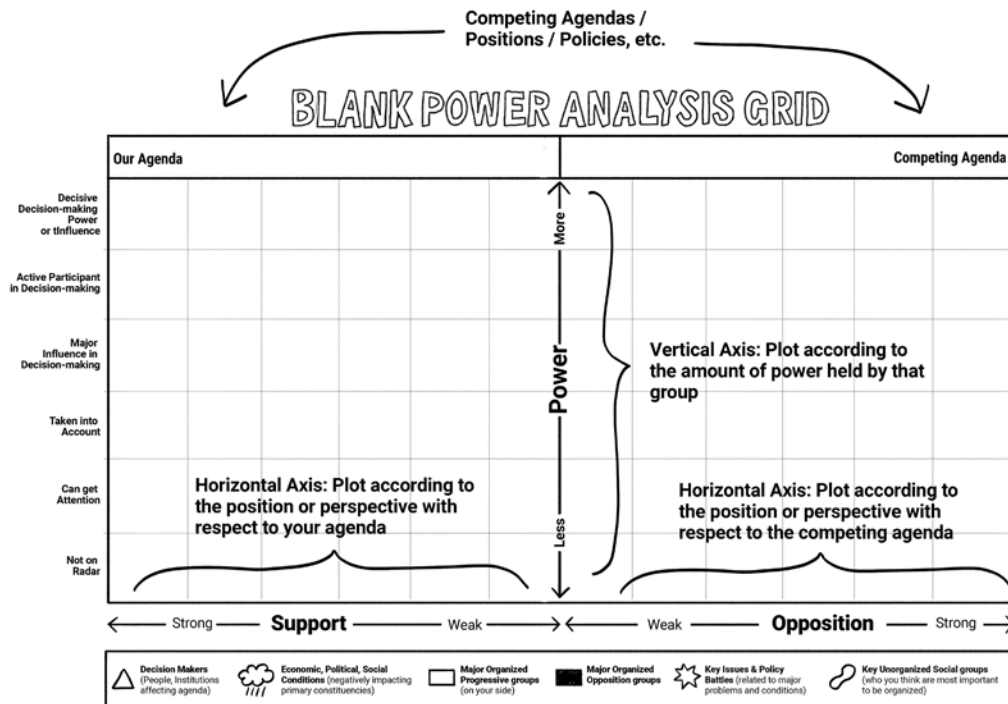
Outcome	Your Campaign
Successful Success	
Failed Success	
Successful Failure	
Failed Failure	

Tool 33

Power Analysis

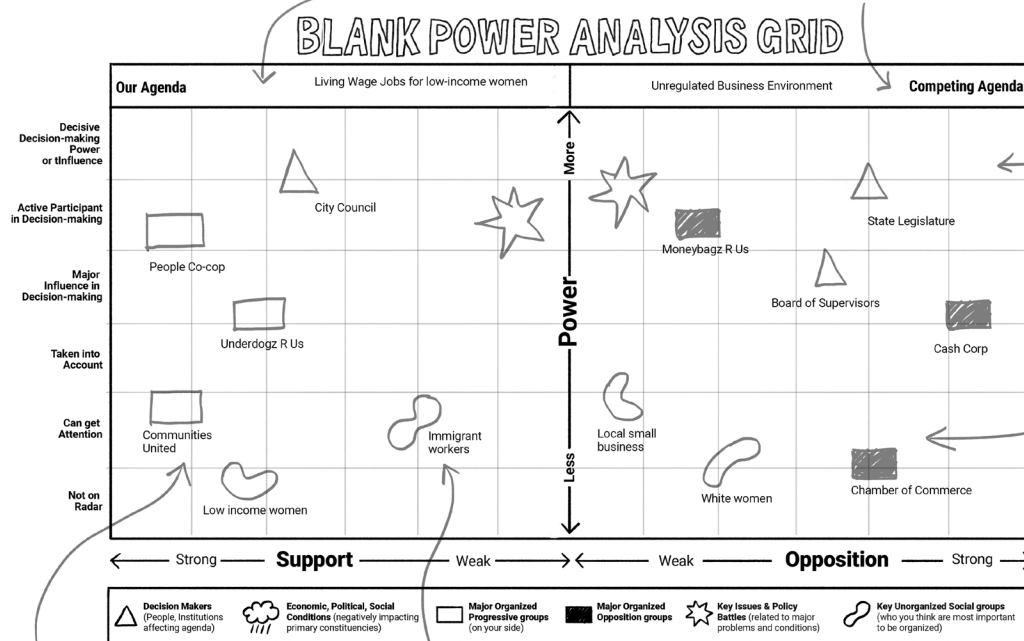
Organizer Anthony Thigpenn and SCOPE created the Power Analysis Tool to map power relationships in our campaigns and communities. Power Analysis draws on collective knowledge to determine which people and organizations have power and influence, and which need to be moved to win.

The first two grids explain the steps needed to complete a power analysis. Use the blank grid to work through the analysis for your community. (SCOPE, scopela.org offers trainings on how to make the most of the process).



Step 1: Define the major economic, political and/or social conditions which are negatively impacting primary constituencies

Step 2: Sketch the competing agendas. The agenda of the forces who are causing or perpetuating the problems, and your agenda (i.e. the vision you are trying to bring about)



Step 3: Sketch the major formal Decision-makers (people, institutions) affecting the agendas

Step 4: Sketch current key issue or policy battles related to major problems and conditions

Step 5: Sketch major organized opposition groups

Step 6: Sketch organized progressive groups (on your side)

Step 7: Sketch key unorganized social groups (who you think are most important to be organized)

Step 8: Analyze picture, refine your agenda, develop organizing and/or campaign strategies

BLANK POWER ANALYSIS GRID

	Our Agenda						Competing Agenda					
Decisive Decision-making Power or tinfluence												
Active Participant in Decision-making												
Major Influence in Decision-making												
Taken into Account												
Can get Attention												
Not on Radar												

← Strong — **Support** — Weak →

← Strong — **Opposition** — Weak →

Power

More ← — — — — — → Less

Decision Makers
(People, Institutions affecting agenda)

Economic, Political, Social Conditions
(negatively impacting primary constituencies)

Major Organized Progressive groups
(on your side)

Major Organized Opposition groups

Key Issues & Policy Battles
(related to major problems and conditions)

Key Unorganized Social groups
(who you think are most important to be organized)

Permission from SCOPE granted.

Tool 34 Strategy Chart

Goals	Organizational Considerations	Constituency People Power	Decision-Maker	Tactics
Long-Term What you really want. <i>Example: Fair and liveable wages for all workers in state!</i>	What resources can you put in now? ▪ Number of people? ▪ Social media lists? ▪ How much time? ▪ Meeting space, copiers, etc. ▪ Money?	Who cares about the issue? ▪ Whose problem is it most directly? ▪ What do they gain if they win? ▪ Who else will be an ally on this issue? ▪ What power do they have over the Decision Maker? ▪ How are they organized; where can you find them? ▪ What risks are they taking?	The person who has the power to give you what you want! ▪ Elected or appointed or corporate? ▪ Do you have electoral or consumer power? ▪ Analyze your potential power over them very concretely so that you can use it strategically!	How you will show power to the D-M so they will say yes to the goals? 1. Show power directly to the Decision-Maker ▪ Letter writing ▪ Petitions ▪ Phone calling ▪ Social Media Tactics ▪ Group Visits to Decision Makers ▪ Media Events ▪ Rallies, Actions ▪ Public Forums ▪ Strategic Civil Disobedience <i>Etc, etc. – be creative!</i>
Intermediate What you are trying to win now. <i>Example: \$15 state minimum wage law.</i>	How will you build your organization? ▪ How many new members? ▪ Money to raise? ▪ New leaders? ▪ Public recognition	<i>How many? Be specific!</i> Opponents? Can you neutralize or divide any opponents?	<i>Always a person with a name, not an institution!</i>	2. Public Education and Organization Building ▪ Teach-Ins ▪ Media events, etc. ▪ Social Media ▪ Rallies/Banners
Short-Term A step to the Intermediate Goal. <i>Example: Get Rep. Smith to vote yes.</i>	<i>How much? How many? Be specific!</i> Internal problems? ▪ How to solve/reduce.			

Tool 35

Leadership Ladder

ID #	Definition	Example of Activity
(5) Member	▪ Sends MPA a check	Not active
(4) Volunteer	▪ On our contact and turnout lists ▪ Have attended at least one event or taken one action ▪ If they have done no activity after repeated personal invitations over a year, they become a 5 again	▪ Attends a rally or MPA event, gives public testimony, writes a letter to the editor, usually calls their senator/representative when asked, volunteers every year on Election Day, etc. ▪ People off MPA member lists that came to a public hearing for our lead environmental campaign ▪ Members who visited their local hospital for our health care research ▪ A resident of downtown Lewiston who came to one of the community events organized to raise awareness about City destruction of affordable housing
(4+)	▪ Have had a 1-on-1 relational meeting done with organizer or top-tier leader	▪ The key to moving these folks is that as soon as someone shows some interest and comes to an event, a one on one meeting is scheduled.
(3) MPA Activist	▪ Attends chapter meetings, trainings, or issue committee meetings ▪ Begin to take ownership, see MPA as a shared responsibility, says “we” not “you” when talking about MPA ▪ Have had an initial LD meeting with an organizer where we get to know them more, ask them to take responsibility for some project, talk about MPA worldview ▪ LD plan is started: organizer talks with them about the skills they have, those they want to learn, and the role in MPA they want to work towards	▪ Threes were the leaders in building our small business coalition by visiting local businesses face to face and asking them to sign up. More than 1500 small businesses were signed up in support of universal single payer in more than 130 towns in Maine ▪ Threes help solicit food donations and advertising sales for our annual fundraising dinners ▪ Threes speak at press events, attend big organizational events like lobby day and retreats, and usually go to chapter meetings ▪ Threes can always be counted on to generate phone calls/emails from 4s and 5s

ID #	Definition	Example of Activity
(3+) ready to move to a 2!	▪ Dependable and accountable—identify with MPA ▪ Have a drive to more and are curious about other parts of MPA ▪ Attendance and participation are regular ▪ Work closely with an organizer or advanced leader on leading a project ▪ Share our worldview—they understand all our issues in the broader context of work for social change ▪ A second LD meeting has been done, including some self-assessment and the plan is updated and adjusted	▪ They take personal responsibility for making sure that all the things listed above are done and done well ▪ They begin to consistently and strategically think about the importance of developing other leaders ▪ They are willing to commit to learning the skill of engaging new members in 1-on-1 relational meetings
(2) Member Organizer	▪ Identify as an MPA leader ▪ Take specific responsibility, make specific commitments, are dependable ▪ Do turn-out, know organizer's math, build the base ▪ Have been through training on how to do one:one meetings, other specific trainings ▪ Train 3s and 4s	▪ Train 3s and 4s on how to collect DirigoChoice enrollee stories, write letters to the editor, prepare public testimony, understand a power analysis, etc. ▪ Serve on statewide issue committees and are part of strategic planning for our campaigns ▪ Represent MPA at coalition meetings ▪ Plan and carry out MPA events like Lobby Day, the annual dinners and running specific projects that directly involve organizing (such as taking a list of 3s and 4s, recruiting and training them for a project)
(2+) Ready to move!	▪ Training on organizing skills ▪ Aware of their own development ▪ A third LD meeting is done including self-assessment, worldview check-in and discussion, member-organizer plan, and MPA strategy ▪ Their LD plan is revised	▪ Have done above types of activities successfully and begin to take personal responsibility for making sure that all the things listed above are done and done well. ▪ Very aware of their own development: they know what that are good at and can train others to do and they know what they want to work on improving
(1) Lead Organizer	▪ Potential statewide board member ▪ Written into organizing plan—MPA can count on the fruits of their labor ▪ Do 1-on-1s regularly ▪ Undergone leadership trainings ▪ Lead spokesperson ▪ Part of strategic planning of organization	In addition to all the activities listed above, they now understand the process that has brought them to this level and start working to help develop other members in the same way. They take on the role of "member organizer". Some may step back from some of the roles they have previously filled in order to develop other leaders to fill those roles. Other 1s might decide to run for office and become an MPA organizer inside the capitol. Others may become long-term Board members.

Permission from Maine People's Alliance granted.

MAINE PEOPLE'S ALLIANCE

Leadership development ladder

Healthy organizations look like this:



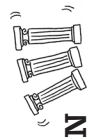
Permission from Maine People's Alliance granted.

Tool 36 Strategy Chart

Goals	Organizational Considerations	Constituency People Power	Decision-Maker	Tactics
Long-Term What you really want. <i>Example: Fair and liveable wages for all workers in state!</i>	What resources can you put in now? - Number of people? - Social media lists? - How much time? - Meeting space, copiers, etc. - Money?	Who cares about the issue? - Whose problem is it most directly? - What do they gain if they win? - Who else will be an ally on this issue? - What power do they have over the Decision Maker? - How are they organized; where can you find them? - What risks are they taking?	The person who has the power to give you what you want! - Elected or appointed or corporate? - Do you have electoral or consumer power? - Analyze your potential power over them very concretely so that you can use it strategically!	How you will show power to the D-M so they will say yes to the goals? 1. Show power directly to the Decision-Maker - Letter writing - Petitions - Phone calling - Social Media Tactics - Group Visits to Decision Makers - Media Events - Rallies, Actions - Public Forums - Strategic Civil Disobedience <i>Etc, etc. – be creative!</i>
Intermediate What you are trying to win now. <i>Example: \$15 state minimum wage law.</i>	How will you build your organization? - How many new members? - Money to raise? - New leaders? - Public recognition	<i>How many? Be specific!</i> Opponents? Can you neutralize or divide any opponents?	2. Public Education and Organization Building - Teach-Ins - Media events, etc. - Social Media - Rallies/Banners	
Short-Term A step to the Intermediate Goal. <i>Example: Get Rep. Smith to vote yes.</i>	<i>How much? How many? Be specific!</i> Internal problems? How to solve/reduce.			

Tool 37
Long-Term Agenda

See the “Long Term Agenda Backgrounder” from Grassroots Power Project for more on how to use this Tool.

OUR CURRENT FIGHTS	STEPPING STONE FIGHTS	MILESTONE REFORMS	STRUCTURAL TRANSFORMATION
 What fights are we currently taking on?	 What are fights we could take on that would move us towards our milestone reform?	 What's the next big mountain we should aim for? What is another reform we could win along the way to our long-term agenda?	 What are the “structural reforms” that would fundamentally transfer wealth and power on our issue?

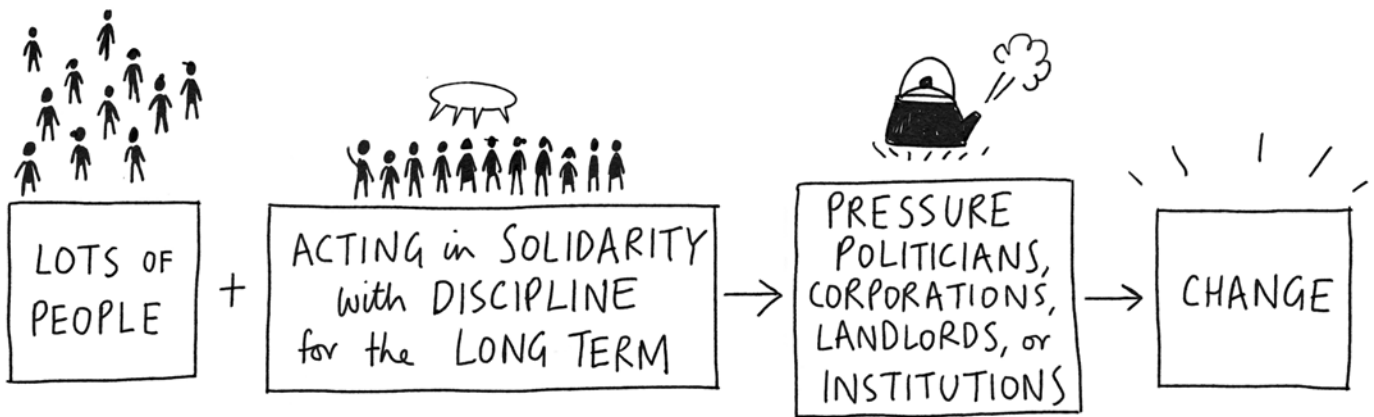


Permission granted from Grassroots Power Project

Formulas

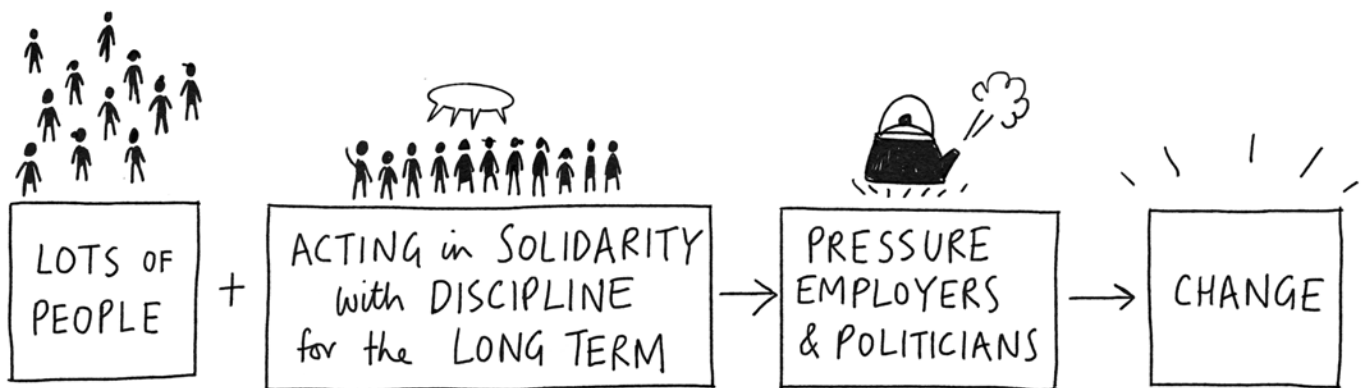
Base Building (Community)

(Page 84 of *Practical Radicals*)

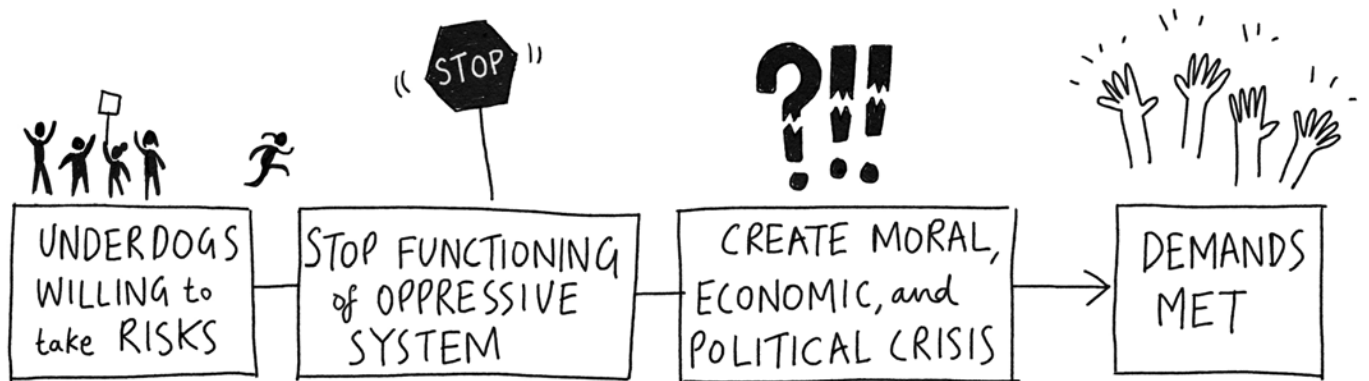


Base Building (Labor)

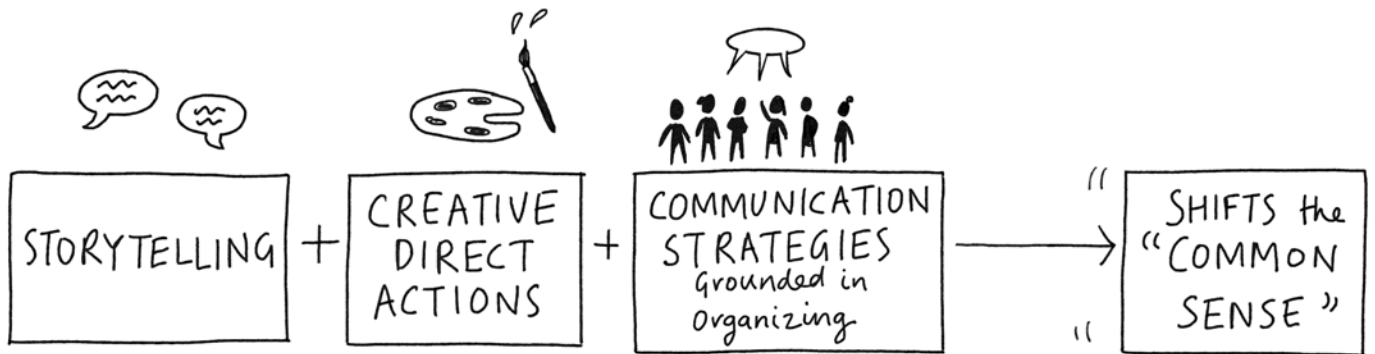
(Page 107 of *Practical Radicals*)



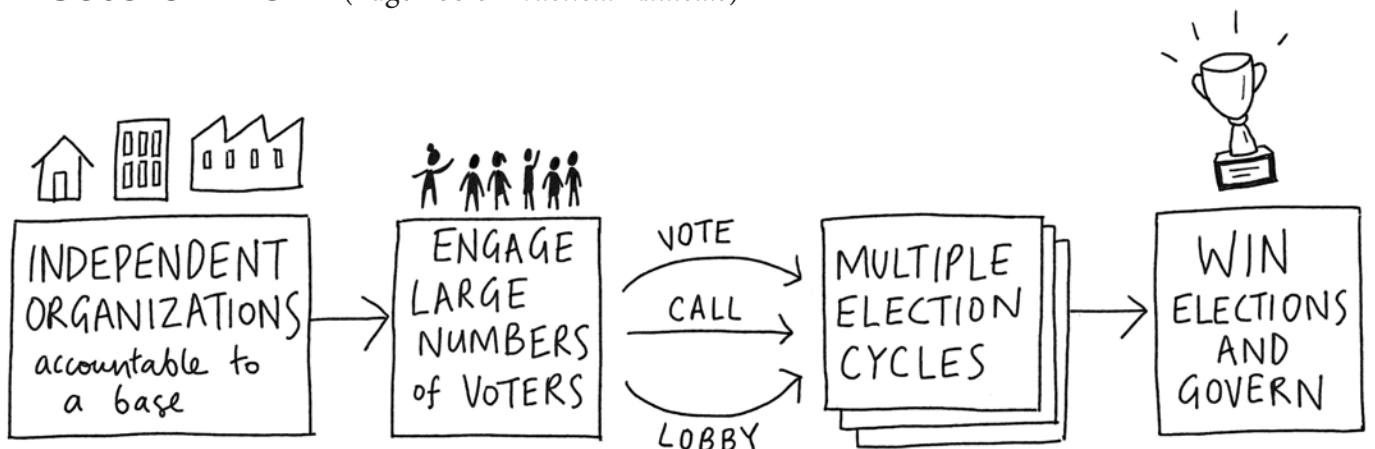
Disruption (Page 121 of Practical Radicals)



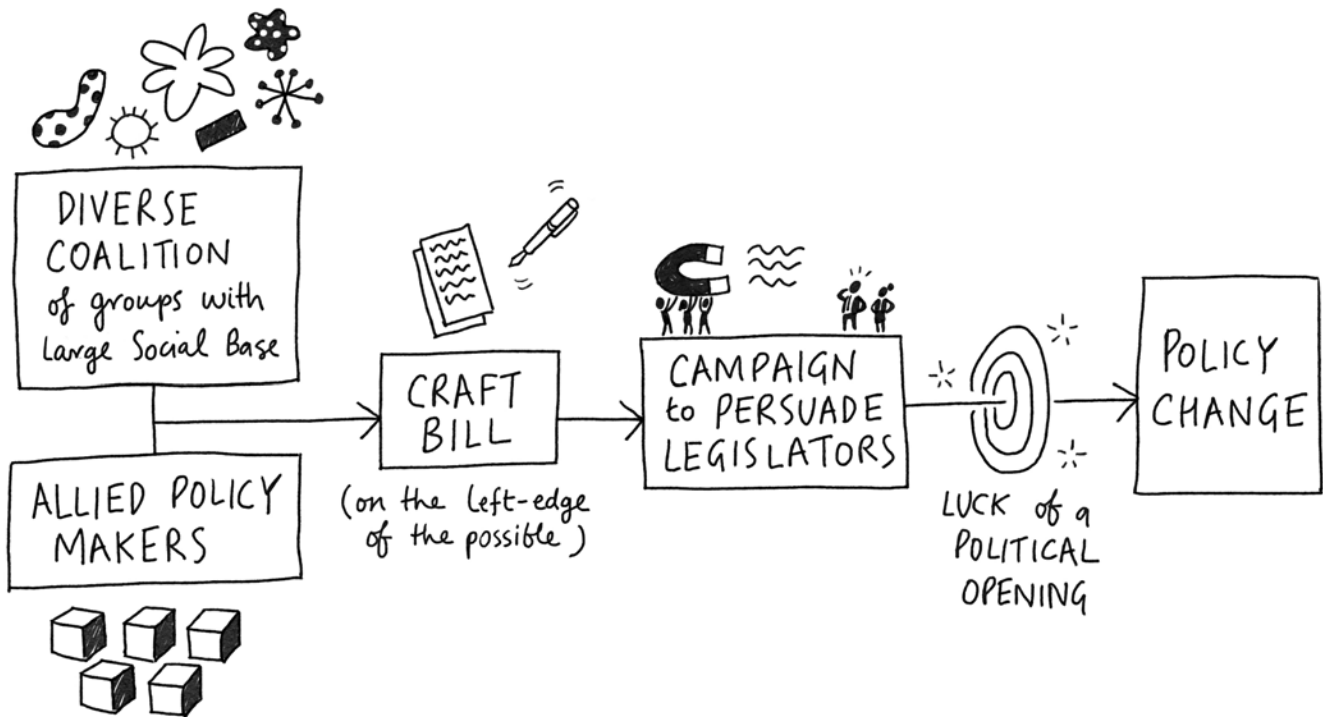
Narrative Shift (Page 145 of Practical Radicals)



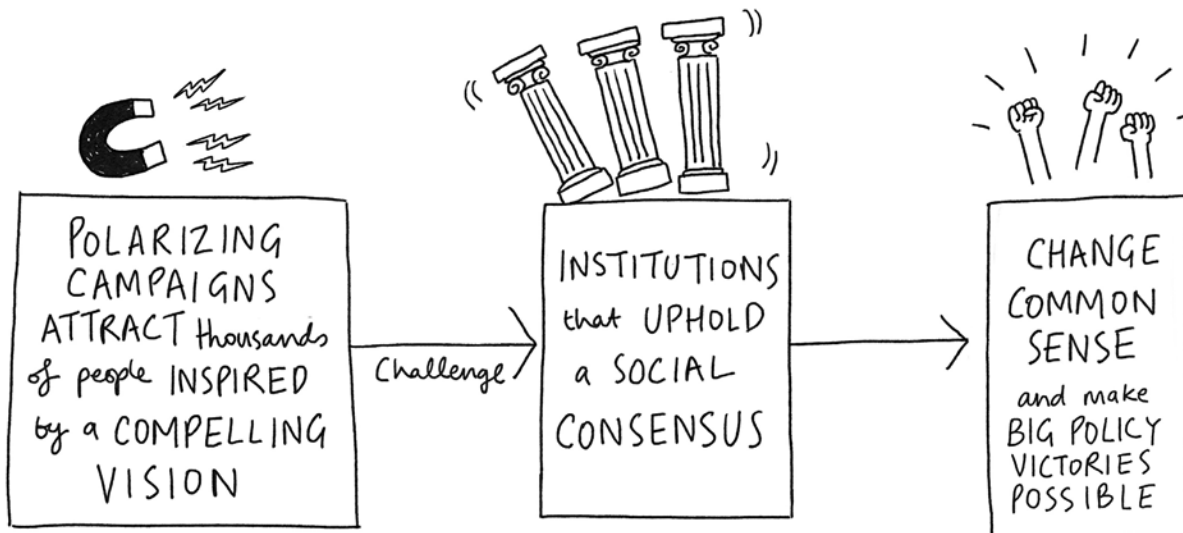
Electoral Work (Page 166 of Practical Radicals)



Inside-out Campaign (Page 179 of *Practical Radicals*)



Momentum (Page 194 of *Practical Radicals*)



Collective Care (Page 212 of *Practical Radicals*)

