



Campaign Academy: Building a Team for Winning Campaigns



Participant Handouts

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

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Community Agreements for Our Time

Awareness and Self-Knowledge

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

Listening for Understanding

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

Being Gracious

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

Staying Engaged

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

Being Open and Suspending Judgment

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

Saying "I"- tell your truth

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

Lean into Discomfort

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

Reaching Empathy

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

Expecting Non-Resolution and Non-Closure

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

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

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

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

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

The Intersection of Our Core Values and Union Values

Core values are the fundamental beliefs of a person or an organization. These guiding principles dictate behavior and can help people understand the difference between right and wrong. These can often be expressed in one or two words. We are taking a moment to consider our core values because they can provide a basis for solidarity in the midst of struggles.

What are some of your core values expressed in one or two words?

<i>Your Personal Core Values</i>

Where do your core values intersect with some of the Union Core Values listed below?

<i>Union Core Values</i>
Fairness, honesty/integrity, responsibility, compassion/empathy, safety, health, generosity, hard work/responsibility, community, freedom, democracy, binding contracts, equality, opportunity, respect, stability/security, unity, quality work, justice, collective action, dignity/respect, charity/community service, and due process. <i>Ideally:</i> Unions advance the welfare of all workers. They are based on the idea of justice, progress, and betterment of self and of society. They embody the universal ideal of human rights and the need to aspire to become more complete human beings. By becoming an active participant in the labor movement, members become part of something larger than themselves.

Centering Equity in your Campaigns

What does it mean to center equity in your campaign?

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

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

Self-Assessment of Local Union Strength and Areas for Growth

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

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

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

		across race, class, and gender identities into all aspects of leadership development.		
Majority Status		Union holds clear majority status with membership over 80%; this status is actively maintained and leveraged for member benefit.	Union has majority status between 50% and 80%, with fluctuating membership or contested recognition.	Union holds less than 50% membership or lacks majority recognition; limited influence over workplace decisions.
Committees		Committees are active, well-organized, and effectively contribute to union goals; committees have broad member participation and clear outcomes; Union leadership is intentional about recruiting and supporting committee leaders and members who represent diverse constituencies.	Committees exist and operate intermittently; some member involvement and moderate impact on union activities; there is a belief that all committees should be diverse.	Committees are inactive, poorly organized, or non-existent; minimal member participation and limited contribution to union goals; members don't know how to join committees or what success looks like.
Equity Lens		Union leadership and committees consistently and intentionally apply an equity lens to their work. Organizers use an intersectional systems analysis to understand how race, class, and gender impacts		
Calendared Events		Union regularly plans and executes a comprehensive calendar of well-attended events that engage members and support union goals; these events have a number of ways that participants can access them; translators are available.	Some events are planned and occur with moderate attendance; calendar may be inconsistent or incomplete; some planning for accessibility happens for some meetings.	Few or no events are planned; attendance is low; calendar is poorly managed or non-existent.
Organizing + Engaged Membership Total				

Bargaining and Worksite Advocacy

	Rating	1	2	3
Bargaining		Bargaining process is well-organized, member-driven, and engages community partners or coalition. Wins achieve strong standards for work, education, and community issues. Members are informed and involved throughout; intentional engagement and bargaining	Bargaining occurs with moderate member input; contracts meet some but not all member needs; communication is occasional; there are attempts to be inclusive in communications; bargaining typically stays focused on workplace issues rather than demands for students, parents or the common good.	Bargaining is poorly organized or lacks member involvement; contracts are weak or ineffective; communication is minimal.

		strategies designed to center equity in the process and outcomes.		
Relationship with Administration		Union drives agenda with administration; union input regularly leads in decision-making; union leads on diversity, equity, and inclusion decisions.	Functional relationship with some cooperation from administration; occasional challenges or communication gaps; union has a stated belief that diversity, equity, and inclusion are important.	Administration disregards the union frequently; minimal communication or cooperation with administration.
Advocacy		Union actively advocates for member rights and community interests often in coalition with others, perhaps incorporates bargaining for the common good; effective campaigns and sustained efforts to set policy and win public opinion; union members participate in lobby days or other policy advocacy; union is a clear leader in race, class, and gender justice.	Some advocacy efforts made in terms of engagement with elected officials but does not translate into gains or change; not involved in active coalitions; elected leaders or staff engage in advocacy but members have limited involvement; union has a stated social justice belief.	Little to no advocacy; efforts are minimal, uncoordinated, or ineffective in advancing member or community interests. Local does not have a member rights campaign. Local does not have a plan to coordinate with community supporters to win.
Site Access		Union staff and leadership has full access to all worksites for meetings, outreach, and organizing activities protected by contract language; or when staff is barred from entry, well-trained building reps are able and willing to do member representation and worksite members are able to effectively organize at all worksites.	Union staff and leadership has limited or conditional access to worksites; some worksites have strong reps and structures that can restrict or challenge organizing activities.	Little to no access to worksites; union presence is minimal or obstructed.
Willingness of Leadership Team to Organize		Leadership team demonstrates strong commitment to organizing efforts; proactively supports and leads campaigns to grow and strengthen the union; they willingly engage in public fights that advance race, class, and gender justice.	Leadership shows some willingness to organize; supports efforts when prompted but lacks consistent initiative; they have some willingness to lead issue campaigns associated with race, class, or gender justice.	Leadership is reluctant or resistant to organizing activities; minimal support or engagement in growth efforts; focus is on services and not organizing.
Bargaining + Worksite Advocacy Total				
Communications				
	Rating	1	2	3
Communication		Effective and consistent communication channels exist; all members receive timely, clear, and relevant information in	Communication channels exist but are inconsistently used; there are some translated documents; some members may	Communication is sporadic or unclear; many members lack access to important information; some workers or members

		their first language; texting, phone banking and email may be used in member communication; union organizers track the effectiveness of their communications and adjust their communications strategies to increase accessibility and improve efficacy as needed.	miss important updates; there are some efforts at making communications accessible.	don't realize there is a union. Members can't easily access bylaws, bargaining timelines, grievance decisions, bargaining priorities, etc.
Member Education		Comprehensive education programs regularly offered with intentional plans for including all race, class, and gender identities; members are well-informed about rights, contracts, and union activities; programs are developed to intentionally include race, class, and gender identities in materials and content; member education addresses current social issues such as attacks on immigrant families and federal cuts to critical funding.	Some education programs offered sporadically; members have partial understanding of rights and union functions; there are some specialized programs addressing race or gender identities.	Little to no member education provided; members lack understanding of their rights and union roles.
Marketing and Social Media Presence		Union maintains a strong, consistent, and engaging presence across multiple platforms; effectively promotes union activities and grows membership awareness; union may have online communities for members to engage; intentional and targeted plans to reach all race, class, and gender identities.	Union has some presence on social media or marketing channels; engagement and consistency are moderate; there are efforts to reach a diverse audience on multiple platforms.	Minimal or no social media or marketing presence; limited outreach and promotion of union activities.
Mission and Vision		Clear, well-communicated mission and vision guide all union activities; members understand and support these foundational principles.	Mission and vision exist but are inconsistently communicated or understood; partial alignment with union activities.	Mission and vision are unclear, outdated, or not communicated; little member awareness or alignment with union direction.
Communications Total				
Politics and Policy				
	Rating	1	2	3
Political Action		Union regularly sets the public perception of the issues in local political campaign. Union actively runs or works in coalitions to run political campaigns and advocacy; members are informed and mobilized; Union centers	Some political activity; members occasionally informed or involved in advocacy efforts; union supports and promotes social justice.	Little to no political action; members uninformed or disengaged from advocacy.

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

Infrastructure

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

		experts and a secure infrastructure. Data are used to measure key outcomes related to equity. Union leaders and staff at all levels are data-literate and use data to inform their work. The union's data use leads to measurable improvements in member well-being and economic security. Data is used to measure long-term trends in membership engagement and bargaining success. Data insights are leveraged to expand union influence and shape public policy.	digital tools and databases for basic member and contact management. Access to data is limited to a small group of staff. The union measures the success of specific campaigns using basic data points, such as voter turnout or sign-up rates. Insights are used to adjust short-term tactics.	relies on a few knowledgeable individuals. The union's use of data has no clearly measured impact on worker outcomes. There is no intentional effort to measure equity. Campaign successes or failures are not systematically analyzed with data.
Governance		The union membership understands how their union is governed and processes for that run their union; constitution and bylaws are accessible to members and have been developed and maintained with a focus on equity; members are in relationship with multiple levels of leadership and when issues arise members know who to go to; there are union representatives in more than 80% of the worksites, representatives at the school district or university level on decision making committees, leaders re connected to state and national leadership.	The union has a regular schedule to update the constitution and bylaws; updates include the use of an equity lens; there are officer-elections and regularly scheduled executive meetings; officers attend most (meetings, training courses, conferences, the Representative Assemblies); executive meetings are well attended; members are typically not engaged in the governance of their union or aware of policies and procedures for how their union is run; at least 80% of worksites have union representatives.	The union has an outdated or incomplete Constitution and By-Laws, and the union is in a constant struggle to fill leadership positions; there are rarely elections that are contested; less than 50% of work locations have union representatives.
Infrastructure Total				

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

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

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

3. Overall, which of the areas above do you think are the largest challenges for your local?

4. In the areas that you've identified as your biggest challenges, what are the main barriers your local faces?

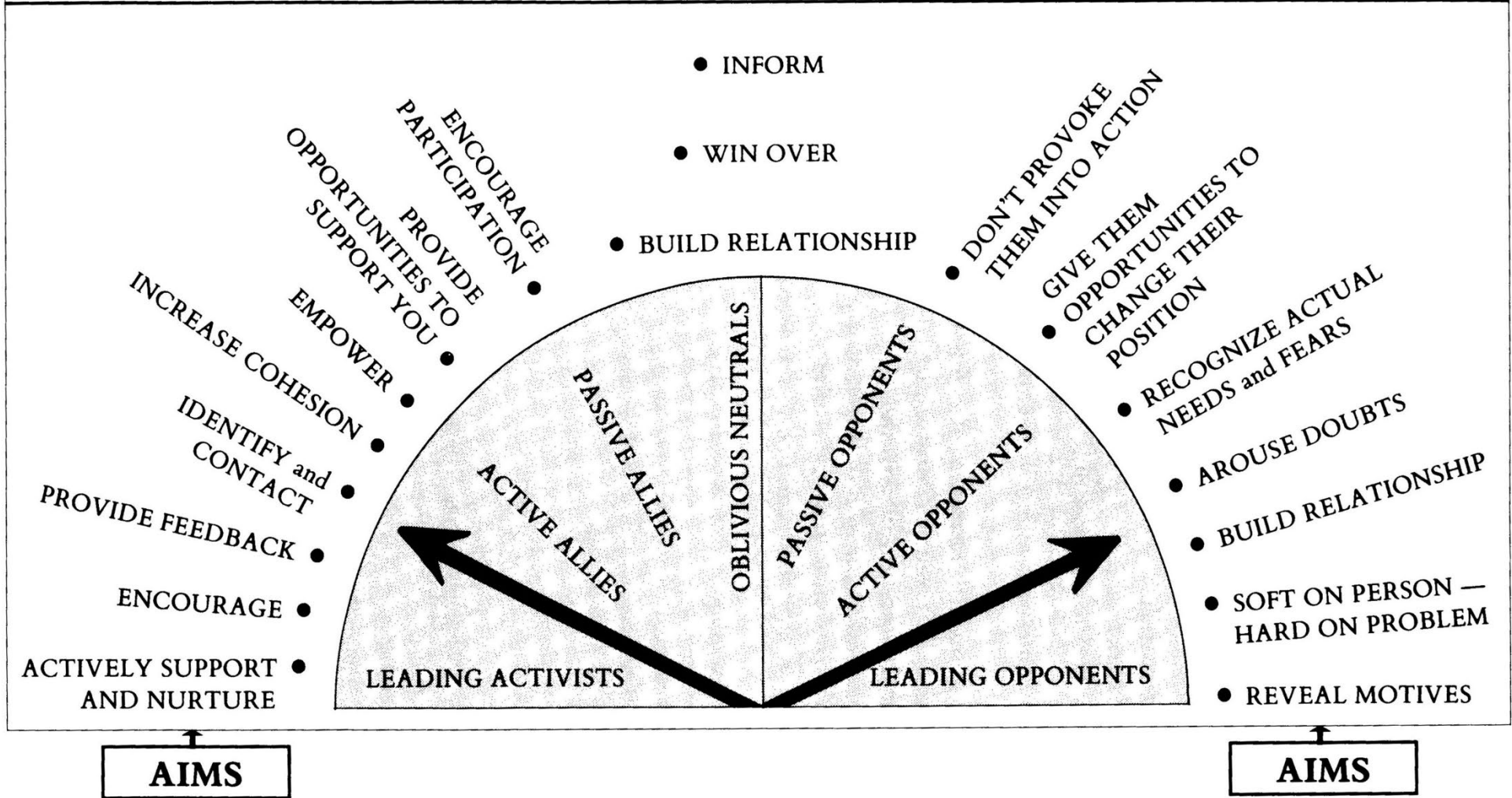
5. Which of the above areas do you think should be the top three priorities for your local to address?

SOCIAL BAROMETER

* WHERE DO OTHERS STAND ON YOUR ISSUE? Identify Individuals and Groups

* WHAT ARE YOUR AIMS WITH EACH?

ARE YOUR TACTICS CONSISTENT WITH THESE AIMS?



I wish to acknowledge inspiration from David H. Albert: "People Power — Applying Non Violence Theory" New Society Publishers, Philadelphia, PA, 1985.

Worksheet: Spectrum of Allies Segments

1. **Active Allies:**

You believe you can already count on them to help you.

If your target falls in this area of the spectrum – you tactics will need to find ways to engage your allies even more actively in working with you toward your goal.

2. **Passive Allies:**

You think they have the same interest, investment or need to solve the problem as you do, and may be close to agreeing with you about your vision, but perhaps may not be able or willing to actively or overtly support you.

If your target falls in this area of the spectrum - your tactics will need to help move them to the “*active ally*” position; increasing their interest and willingness to be active.

3. **Neutral:**

These are people, organizations, institutions that may not know about the problem; may not know about you and your work; have no particular investment in the problem.

If your target falls in this area of the spectrum – your tactics will need to find ways to inform or educate them about the problem and your position in order to move them to a “*passive ally*” position. Examine your tactics to be sure you will not move them toward your opponent’s position.

4. **Passive Opponents:**

These are people, organizations, institutions that you think have some interests that would be opposed to your vision; they may have relationships with people who are actively opposed to you.

If your target falls in this area of the spectrum – your tactics will need to create doubt about their position, raise fears that their position may be “costly” to them in some way. You want your tactics to move them to a “neutral” position and NOT to an active opponent position.

5. **Active Opponents:**

These are people, organizations, institutions that have a big investment in opposing your position (related to power, position, finances, relationships, etc.).

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

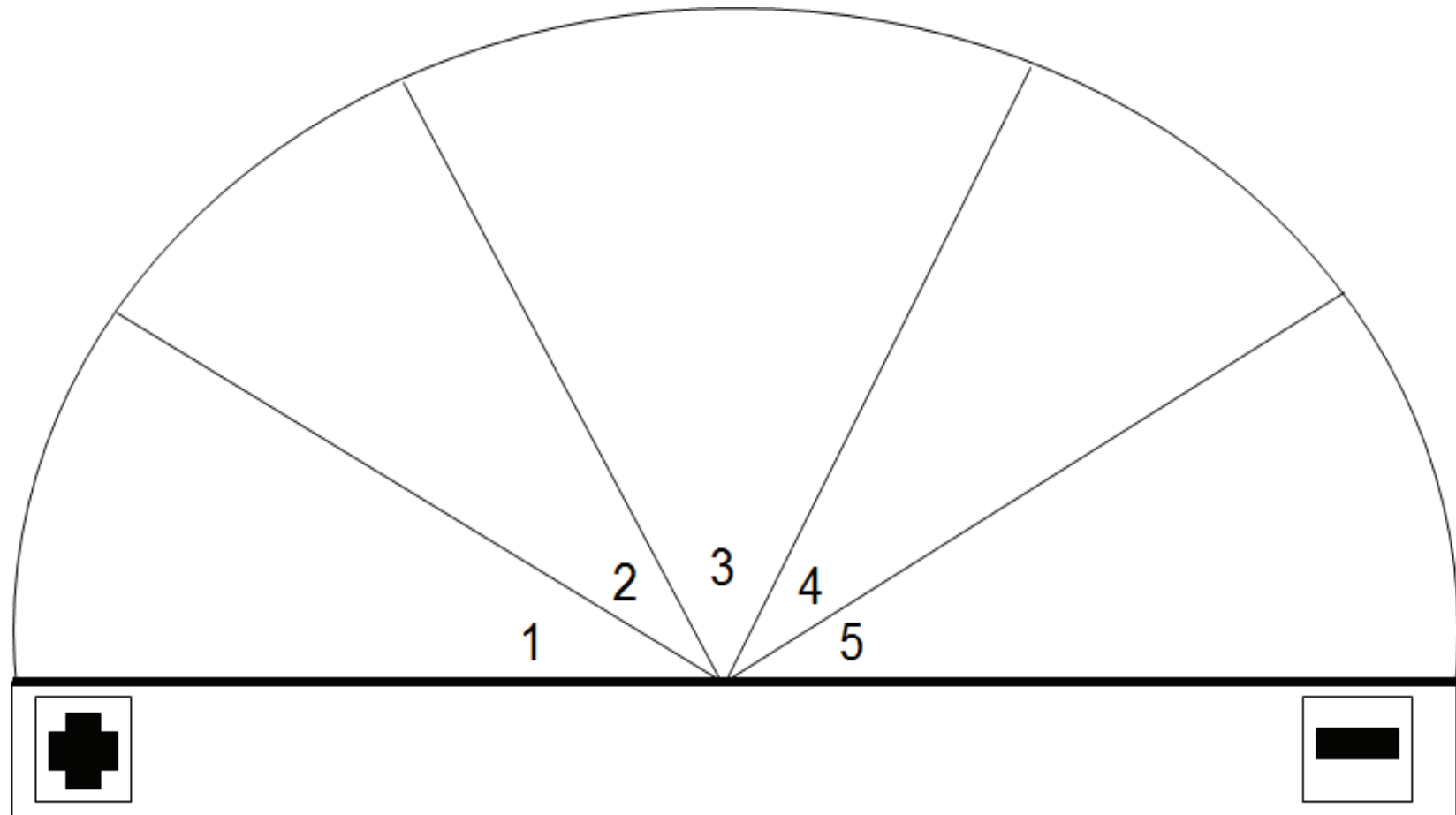
New Tactics in Human Rights is a program of The Center for Victims of Torture

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Problem Statement: _____



Source: Original Source – Training for Change (www.trainingforchange.org) and adapted into five segments by New Tactics in Human Rights.

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Vision + Goals = Strategic Planning



Use the chart above to brainstorm goals for a strategic plan. Follow the order of the boxes.

1. Goal that fundamentally shifts money and power (achieves a significant part of your vision). Example: Fully funded schools.
2. Goal you are currently trying to win. Use this to build your base. Example: Raises that keep pace with inflation.
3. Bigger goal on the horizon that requires you to build a coalition to win and lays the groundwork for goal #1. Example: Campaign to lower class size and student ratios for paraprofessionals, nurses, and counselors.
4. Milestone goal that significantly expands your coalition and provides a stepping stone to goal #1. Example: State billionaire tax.

Case Study Links

North Carolina Association of Educators (NCAE)

- <https://www.newsobserver.com/news/politics-government/article315315642.html>
- https://docs.google.com/document/u/0/d/1mXIEwM3HvTjwegQE-dxJ9lyjIVo_b2mWm1gb6f_iTzE/mobilebasic?urp=gmail_link
- <https://www.ednc.org/the-what-and-why-of-meet-and-confer-in-north-carolina-school-districts/>

United Teachers of Richmond (CTA)

- <https://richmondside.org/2025/09/29/wccusd-teachers-protest-district-spending-plan/>
- <https://www.kqed.org/news/12066401/west-contra-costa-teachers-strike-continues-as-support-staff-return-to-work>
- <https://richmondside.org/2025/12/10/wccusd-strike-ends-school-to-resume-thursday/>

Colorado Springs Education Association

- <https://coloradosun.com/2025/10/08/hundreds-of-colorado-springs-teachers-strike-over-loss-of-collective-bargaining/>
- <https://www.rmpbs.org/news/education/colorado-springs-textbook-censorship>
- <https://www.nea.org/nea-today/all-news-articles/despite-district-threats-educators-strike-colorado-springs>

Leader Identification Exercise

You work for a mid-size school district. The district has 50 schools, including 30 elementary schools, 15 middle schools, and 5 high schools. Your union is made up of 6,000 education workers, including teachers, counselors, paraprofessionals, bus drivers, and custodians.

In your state, educators do not have collective bargaining rights. This means that the school district is not legally required to bargain a union contract with you. Over the years, you and your co-workers have organized around issues like school closures and health insurance, and gotten the school board to vote in your favor.

Three years ago, during your fight with the school district over health insurance, your union organized a petition demanding no increases to premiums, which 55% of workers signed. The school board felt the pressure and voted against increasing your premiums. Since then, workers at individual schools have done organizing around local issues (bad principals, saving individual positions from being cut, etc).

This year, the school district claims it is in financial crisis, and is threatening to raise health insurance premiums, put a freeze on hiring for open positions, and possibly close schools. As a union, you and your co-workers have a goal of winning collective bargaining within the next three years, and you know that mounting a strong fight against any cuts is key to building the unity required to win that – and to saving your schools.

You have just been elected to leadership of your union's local chapter, and you are trying to figure out how to build a strong committee in the next few months that can lead a fight against the cuts and build towards winning collective negotiations. You've just finished meeting with the delegate (school rep) at one of the largest high schools, and here is what you've learned from talking to her about potential leaders and other workers who wield influence:

Darryl Smith is a music teacher and has been at the school for twenty years. Even though he's in a small department – there are only two other music teachers – he seems to know everyone. He runs the school band, which the school is famous for. With his hard work, the band travels around the state for competitions. Because of the band, he knows a lot of the parents, and they are always helping him by chaperoning trips and fundraising. He's famous for the happy hours he organizes monthly with parents at the local bar to fundraise for the music programs. School administrators attend the happy hour sometimes, too. Darryl has some controversial opinions about politics and has been outspoken about them on many occasions. Darryl's sister is married to the assistant principal, and they are close, but he always says that it doesn't impact his support of the union. He was really active in the health insurance fight three years ago, and spoke at a school board meeting in support of the union demands then. Everyone jokes about his daily "uniform," which includes his union lanyard.

Cherelle Williams is a history teacher who has been there for fifteen years. She was the history department chair for years, but this year she said she is finally too busy and doesn't have time, even though everyone wanted her to do it again. She told them she didn't want to be pressured into doing it. Cherelle is the person other teachers go to for advice when they are struggling in their classrooms. At the end of last year, the principal made changes to some of the school policies, including one about how students would be disciplined if they were tardy. All of the staff were up in arms, because it was going to create a lot more work for them, and because some of them thought it was unfair for the students. One day in the staff lounge, Cherelle said that they should all refuse to sign off on the new policy. People agreed, and so she told them to follow up with the people in their departments who weren't there. She got Jennifer to talk to Nicole, who then made sure the paraprofessionals didn't sign it. At the next staff meeting, the principal realized that no one had signed off on the new policy, and announced that the change wouldn't happen. Cherelle is not a union member, and has said she never will be. She thinks paying dues doesn't make sense when they don't even have collective bargaining

rights, and that the union is just trying to get more money for itself. During the healthcare fight a few years ago, she felt that the union waited too long to take action.

Jennifer Okeke is a math teacher who has been at the school for eight years. She is known as the friendliest teacher in the school. She never says no when she is asked to volunteer to be on a committee or help with an event. Because of her, the math department hosts tutoring once a week after school for the students who need it, and it's brought test scores up. Even though she's relatively new, she is the chair of the Math department, because there's been so much turnover and because all of the more veteran teachers are burned out. For her, anything that is for the students is worth it. She also organizes birthday lunches and retirement parties for her coworkers. She is especially friendly with the other younger teachers. She is pretty new to teaching, and had never been in a union before, but she signed up when she got hired. She's the first one to talk to the new teachers each year on the first day of school about signing a union card, and some of them sign up. She has a chronic illness, and is very passionate about protecting their health insurance. Jennifer is in the room across the hall from Cherelle, and they have lunch together. Jennifer recently joined the union's political action committee, and knocked on doors for the last school board election.

Nicole Escobedo is a paraprofessional at the school who has been there for 35 years. She is the most veteran employee in the whole school, and has worked with generations of families who have attended the school. She knows all the ins and outs of the school, and all the gossip. Rumor has it she has set up many successful marriages! Three years ago, Nicole's husband got cancer, and she was his main caretaker, and she ran out of her sick time. All of her co-workers donated their extra sick time to her so that she could spend more time taking care of him. Nicole's mother also worked at the school, and was very active in the union until she retired. Nicole tells people that they should be grateful to have a union, even if they don't have collective bargaining rights. She is friendly with Cherelle, but when Cherelle says it doesn't make sense to be a union member, Nicole says that Cherelle doesn't understand. Nicole thinks Cherelle is too anti-union and has a bad attitude. Nicole used to be the union delegate, but stepped down when her husband got sick. People still ask her to sit in on their disciplinary meetings with them. She once got injured at work, and became an expert in navigating the workers' comp process, which is notoriously complicated. People often go to her with questions about workers' comp and their paid time off.

- 1) Based on what's in the scenario only, who do you identify as the Leader who has moved people the most? Why?
- 2) List the specific order of everyone you want to meet with and why (who first, second, etc)?
- 3) What else do you want to know about each of these four employees? Why?

Leader, Mobilizer, or Activist Identification

Based on what's in the scenario only:

Discuss the following in your small groups. Be prepared to defend your answers. There are correct and incorrect answers to these questions.

1. Who do you identify as the Leader who has moved people the most? Why?
2. Who is the mobilizer – actively working on the behalf of the union and carrying out actions that get others involved? Why?
3. Who is an activist – a pro-union supporter and may take action if asked? Why?
4. The BIG discussion - In what order should you be building relationships with your choices?

Scenario: High School Union Representation

You work for a union representing Jane McAlevey Memorial High School with about 1500 students and a faculty of over 100 teachers spread across various departments. Recently, the school has faced significant challenges due to budget cuts, leading to staff layoffs, increased class sizes, and stagnated salary increases that have barely kept up with inflation. The faculty is unhappy with their current contract settlement, and there has been a notable turnover in teaching staff this year, the highest in recent memory. With a new contract negotiation set to begin in four months, you have just been assigned to McAlevey High School and its membership. Your goal is to strengthen the union before these critical negotiations.

You meet with the outgoing union representative, who has left to pursue a position in another school district. Here's what you learn about potential leaders and influential figures among the faculty:

Sarah Johnson is a Social Studies teacher who has been at the school for eight years. She is well-liked by her colleagues, known for her engaging teaching style and her ability to connect with students. Sarah is active on social media, often sharing and promoting union events and initiatives. She hosts monthly meet-ups for teachers to discuss issues and organize social events, fostering a sense of community among the staff. Sarah also volunteers with community organizations and proudly wears her union pin at school events.

Mark Thompson is a Science teacher and head of the department, having worked at the school for over ten years. While he has never been openly supportive of the union, believing unions are unnecessary for educators, he recently showed a willingness to engage with colleagues on governance matters after being appointed by the administration to a curriculum advisory board. When the teachers learned about proposed changes to the science curriculum that conflicted with internal governance processes, Mark took initiative to coordinate a meeting. He

successfully gathered teachers' concerns and organized a petition which led to the administration shelving the controversial changes.

Linda Chen is a Math teacher who has been at the school for 12 years. She is a staunch union supporter and has served as a union representative in the past. Linda frequently mentors new teachers and offers guidance on navigating union issues. When Mark organized the meeting regarding the curriculum changes, Linda was key in rallying support among faculty, encouraging them to voice their opinions and ensuring significant attendance at the meeting.

Chris Patel is an English teacher who has been at the school for three years. Inspired by Linda, Chris has been an active member of the union, motivated to take part in various initiatives to strengthen faculty support. He often discusses union-related topics in his classes and encourages colleagues to get involved, although he prefers to stay behind the scenes rather than take on formal leadership roles.

Emily Rivera is the school's Art teacher, in her fourth year at the high school. Known for her creativity and ability to inspire her students, she supports union efforts but finds herself preoccupied with her own projects, leaving her little time to engage with broader faculty concerns. While she's pro-union and participated in the petition for the curriculum changes, she feels that others should play more active roles in organizing the faculty.

Things to Consider When You are Planning to Run a Campaign

Assessing Your Current Worksites:

1. How many people have been identified as trusted and respected by a number of people in the worksite/ local? (Leaders connect mobilizers into structures)
2. How many people are actively working in support of the union and have a group of folks that they influence? (Mobilizers get activists to show up and act)
3. How many people are ready to take pro-union action? (Activists see their relationship with the union as a participatory one)

Semantics Exercise

For this exercise, work as a group and please redo these sentences (common phrases).

You can't use the following words: The union (or union at all), organization, we, us, our, or I.

1. **Bad** = "Thank you."
Better =

2. **Bad** = "Union membership is like insurance; don't you want someone to protect you in case something bad happens?"
Better =

3. **Bad** = "Let me explain what the union/organization does for you."
Better =

4. **Bad** = "The union usually gets us more in pay raises and benefits than we pay in dues so if you do the math it's definitely a good investment!"
Better =

5. **Bad** = "You say you have a good principal now, but sometimes managers change, you never know. What if you end up with a bad principal tomorrow and need the union to stand up for you?"
Better =

6. **Bad** = "We need all the members (or all of you) to call your elected representative to oppose this legislation."
Better =

7. **Bad** = "That's not actually a grievance so there's nothing we can do for you."
Better =

8. **Bad** = "The union leadership believes strikes are an absolute last resort, we do our best to prevent them on your behalf, since no one wants to strike ever."
Better =

Building Relationships through One on One Conversations

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

LAVA

LISTEN:

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

AGITATE:

- Make them see that they aren't alone and people are coming together so the decisionmaker will listen.
- Keep the conversation flowing.

- Make links between the organizing vision and their own personal or community experience.
- Use your personality; people get involved because they like you
Be genuine. Don't argue.

VISION:

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

ASK:

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

AHUY: DEVELOPING A RAP

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

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

AAR

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

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

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

Vision and Goal Work Sheet

May 2026 Coaching and Leading Campaigns

Identify the Problem with the VISION Statement AND how would you fix it?

1. Statement: "Our vision is to win a 6% raise in this year's contract."
2. Statement: "Our vision is to hire 10 more special education teachers by next fall."
3. Statement: "Our vision is better schools."
4. Statement: "Our vision is to improve working conditions."

Identify the Problem with the GOAL Statement AND how would you fix it?

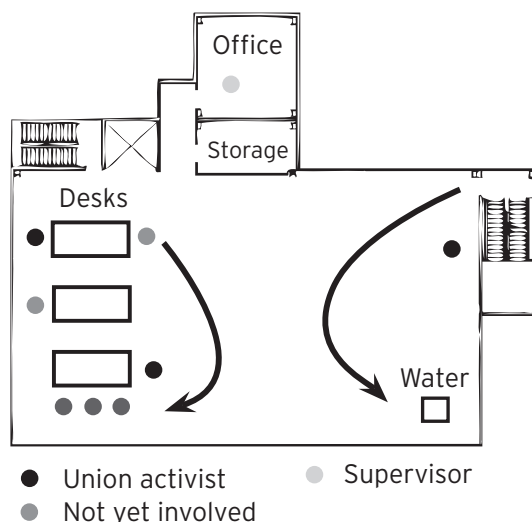
5. Statement: "Our goal is equitable schools for all students."
6. Statement: "Our goal is to support educators better."
7. Statement: "Our goal is to reduce class sizes."
8. Statement: "Our goal is to someday improve staff retention."



EXERCISE: MAP YOUR WORKPLACE

You will need:

- Butcher paper
- Color markers
- Sticky dots



Start with the physical space. First, use a flipchart or large sheet of paper and a black marker to outline the area or building, showing entrances, exits, and windows. Label the offices, production lines, storage areas, shipping and receiving docks, lunchrooms, and bathrooms.

Add details such as machines, desks, and water coolers. If the building is large, make maps of different areas. Be sure the map is large enough to show the information clearly.

Add motion. Draw the flow of work or production, and/or the paths that different people take through the space regularly, in different colors.

Are there spots where the flow of work tends to get bottlenecked? These could be important pressure points. Who works there?

Are there places where people congregate, like the break room or the proverbial water cooler? These could be good places for outreach conversations, or group gatherings.

Add all the people. Sticky dots work well to represent workers. You might use different colors to indicate supervisors, union activists, various jobs, or shifts. Mark the dots with initials or names.

CAN YOU GET A LIST?

It's best to work from a list of all employees in your workplace or department (whatever you're mapping). Otherwise it's surprisingly easy to forget people, especially those you don't work closely with, part-timers, or those with unique jobs.

Maybe you can get this list from your union office, especially if you're a steward. If not, is there a list at work you can discreetly copy or take a picture of? The boss may distribute an emergency phone list, or post a schedule. Be resourceful.





EXERCISE: MAP YOUR WORKPLACE PART 3

Discuss your map. You now have a great deal of information about interactions in your workplace. This is a good place to stop and ask yourselves:

What do you see?

Even when people know their workplace well, the map will help them see it with new eyes. Ask open-ended questions.

What's going on here?

Do we see any patterns?

How does news travel?

What new questions does this map raise?

The stories that come out will be about issues that are bothering people. Keep adding to the map, marking which workers are being harassed by management, for instance, and which are facing layoffs. If the map gets too crowded, start tracking the information another way.

Use your map to identify areas and leaders to focus on. Making workplace dynamics visible puts valuable information on the table.

See this group over here, the one we've never had contact with? Who can talk to someone in that group?

The next time you go to work, look around and compare the reality to your map.

Did we overlook anyone?





TEN QUESTIONS TO ASK WHEN MAPPING YOUR WORKPLACE

1. **Grapevines.** What paths do people travel? Who can walk freely through the whole workplace? How does news travel?
2. **Bottlenecks.** Are there spots where the flow of work gets bottlenecked? These could be important pressure points. Who works there?
3. **Work groups.** What work groups can we identify on this map? Consider the factors that determine who works together in your workplace, such as job, work area, and shift.
4. **Relationships.** Which work groups have contact with each other through their jobs? Which groups are hard to reach?
5. **Social groups.** What social groups can we identify on this map? For instance, who carpools together? Who speaks the same language? Who socializes at lunch or outside work? Who's related? Who are all the smokers?
6. **Group concerns.** For each work or social group, how does this group relate to management? What are the biggest problems affecting this group?
7. **Water coolers.** Where do people congregate? These could be good places for outreach conversations, or group gatherings.
8. **Broom closets.** Where can you talk out of sight of the boss?
9. **Hangouts.** Where do people go after work?
10. **As time goes by.** What on this map changes at different times of day, and at night if your workplace has a night shift? How about on the weekends? Different seasons of the year?



Mapping Readiness & Leadership Coverage

A Scalable Organizing Tool for Site, Department, and District Teams

Instructions: Review the tiers below and check the statements that best reflect your current reality. Choose what is most true now—effective mapping starts with honesty, not aspiration.

Scope of Mapping:	Site / Building	Department / Program	Districtwide
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Tier 1 — Starting From Scratch (Learning the Landscape)

- No clear list of who works where
- Large parts of the worksite are unfamiliar or unnamed
- Relationships and influence are mostly informal
- Entire groups or shifts not yet engaged

Tier 2 — Some Data, Not Yet Organized (Seeing Patterns & Gaps)

- Names and lists exist, but are not visualized
- Leadership is uneven across areas or roles
- Some areas organized, others isolated
- Roles are not always clearly defined

Tier 3 — Strong Data, Needs Action Alignment (Building Readiness)

- Most people and roles identified
- Influence networks are visible
- The challenge is activating people into action
- Some leaders are carrying too much

Reflection & Record

Our Team Is Currently Operating In Tier:

One Key Growth Area or Opportunity Identified:

Completed By:

Role:

Local / Worksite Name:

Date:



EXERCISE: WHY WE NEED LEADERS TO ORGANIZE

Imagine a scenario where there is an urgent need to fight. For instance, suppose a well-loved leader in your workplace has been fired, and you're organizing a sticker day to demand she be rehired. You have just 24 hours to get the word out to everybody and get the sticker into everyone's hands.

Use the following questions to make a plan for your sticker day:

- **Total number of people** you want wearing the sticker: ____.
- **How many departments or areas are there in your workplace?** Can you cover them all? Who moves around the worksite and can reach other departments?
- **How many shifts** are there? Who can get stickers to workers on each shift?
- **Where's the best place** to reach people before they start work? Where are all the entrances workers use?
- Are there groups of workers who **don't speak your language?** Who can reach them?
- Can you get a sticker onto **everyone** by yourself, or with your current group of stewards?

If not, that's why we need to map and chart our workplace, then recruit enough leaders to reach every worker!



Creating Leadership Teams

What is our purpose and what are our norms and roles?



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We welcome your suggestions for improving this guide further for future training. We also welcome you to use it and adapt it for your own training, subject to the restrictions below.

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Creating Leadership Teams

What is our purpose and what are our norms and roles?

Goals for this session

- To develop an understanding of the core practices of successful leadership teams
- To practice those skills by developing a shared purpose, clarifying team roles and responsibilities, and creating norms and practices of coordination

Why do leadership teams matter?

Most effective leaders create teams to work with them and to lead with them. Take for example Moses, Aaron and Miriam in the story of Exodus, or Jesus and the twelve disciples in the New Testament, or Martin Luther King, Ralph Abernathy, Rosa Parks, Jo Ann Robinson and E D Nixon during the Montgomery Bus Boycott.

A leadership team offers a structured way to work together interdependently, each person taking leadership on during part of the team's activity. At their best leadership teams recognize and put to productive use the unique talents of the individuals who make up the team.

Team structures also help create strategic capacity—the ability to strategize creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. In the Obama campaign, the field structure created multiple layers of leadership teams to engage people creatively and strategically at all levels of the campaign. Each state had a state leadership team that coordinated regional leadership teams (of Regional Directors and Organizers), which coordinated local neighborhood leadership teams of volunteer leaders.

At every level the people on leadership teams had a clear mission with clear goals and the ability to strategize creatively together about how to carry out their mission and meet their goals. This structure created multiple points of entry for volunteers, and multiple opportunities to learn and to exercise leadership.

Leadership teams provide a foundation from which an organization can expand its reach. Once a team is formed, systems can be created to establish a rhythm of regular meetings, clear decisions and visible accountability, increasing the organization's effectiveness. One person alone cannot organize 500 people. It is built by finding people willing and able to commit to helping build it, and creating relationships and a solid structure from which it can be built.

So why don't people always work in teams?

We have all been part of volunteer teams that have not worked well. They fall into factions, they alienate each other, or all the work falls on one person. Some aim to keep the pond small so they can feel like big fish. So many of us come to the conclusion: I'll just do it on my own; I hate meetings, just tell me what to do; I don't want any responsibility; just give me stamps to lick. There's just one problem: we can't become powerful enough to do what we need to do if we can't even work together to build campaigns we can take action on.

The challenge is to create conditions for our leadership teams that are more likely to generate successful collaboration and strategic action. When groups of people come together, conflict is always present. Effective teams are structured in a way to channel that conflict in productive ways, allowing the team to achieve the goals it needs to win.

Three measures of an effective team:

1. **OUTPUT (WORLD):** The success of your team in taking the action required to achieve its valued goals – winning the game, winning the campaign, putting on the play, etc.
2. **CAPACITY (TEAM):** Over time your team is learning how to work more effectively as a team, and developing more leadership.
3. **LEADERSHIP DEVELOPMENT (INDIVIDUAL):** Individuals who participate on your team learn and grow as a result of their participation.

Three conditions that make for a “real” team:

1. **Your team is bounded.** You can name the people on it; they don't come and go, whoever shows up doesn't have the automatic right to participate in the team. Most highly effective teams have no more than 4 – 8 members.
2. **Your team is stable.** It meets regularly. It's not a different, random group of people every time. Membership of the team remains constant long enough that the team learns to work together better and better; each member is fully committed to be on the team and commits consistent time and effort to it.
3. **Your team is interdependent.** As on an athletic team, a string quartet, or an airplane cabin crew, the contribution that each person makes is critical to the success of the whole. Team members have a vital interest in each other's success, looking for ways to offer support.

Three steps to launching an effective team:

1. **You have a shared – and engaging – purpose.** You are clear on what you have created your team to do (purpose), who you will be doing it with (constituency), and what kinds of activities your team will participate in. The work you have to do is readily understood, it's challenging, it matters and you know why it matters. Team members need to be able to articulate for themselves and others this “purpose”.

2. **You have created clear interdependent roles.** Each team member must have their own responsibility, their own “chunk” of the work, on which the success of the whole depends. No one is carrying out activity in a silo that’s secretive to others. A good team will have a diversity of identities, experiences and opinions, ensuring that everyone is bringing the most possible to the table.
3. **Your team has explicit ground rules.** Your team sets clear expectations for how to govern itself in your work together. How will you manage meetings, regular communication, decisions, and commitments? And, most importantly, how will you correct ground-rule violations so they remain real ground rules? Teams with explicit operating rules are more likely to achieve their goals. Some team norms are operational, such as how often will we meet? How will we share and store documents? Communicate with others outside the team? etc. Others address expectations for member interaction with each other. Initial norms guide your team in its early stages as members learn how to work together. Norms can be refined through regular group review of how well the team is doing.



TYPICAL TEAMWORK SESSION

Building your team

Goals for this session

- Develop your team purpose
- Identify the norms you will practice as a team, including a decision-making norm
- Define your leadership roles; then discuss the roles relative to the talents of those in your team
- Develop a team name and chant

Agenda:

Total time: **55 minutes** (5 min transition time)

- | | | |
|----|--|---------|
| 1. | Gather and review agenda. Choose a timekeeper for this session. | 2 min. |
| 2. | Review the simulation campaign context. | 5 min. |
| 2. | Develop your shared purpose using the worksheet that follows. Review your shared interests from the last session, and focus on how you as a team will work together on your campaign. | 20 min |
| 3. | Decide on collaborative norms that will enable you to function with shared commitment. Use the worksheet that follows. | 10 min. |
| 4. | Determine team roles . Brainstorm possible responsibilities as you work together beyond this workshop. For example, who will coordinate the meetings? Talk about how these roles might match up with the talents of those on your team. See an example of team roles below. | 8 min. |
| 5. | Create a team name and chant . | 5 min. |
| 6 | Wrap up: Share reflections and key learning. Choose a representative and bring in your team name, chant, and shared purpose! | 5 min. |

**WORKSHEET:****DEVELOPING SHARED PURPOSE****Agenda:** Total Time: **20 minutes**

1. In the first part, as individuals, you will take 5 minutes to clarify your own thinking about what the purpose of your team could be as you work on a campaign together.
2. In the second part, as a team, you will take 10 minutes to share your ideas, look for the common focus, and discern a purpose you can all support.
3. You then have 5 more minutes to write a new sentence that you think captures the sense of your team.
4. And finally, as a team, you will have 5 minutes to consider the second round of sentences and decide on one that best articulates your team's perspective.

Step 1: Individual Work (5 min.)

- In the first column, based on the work you did on common interests and values in the relationship session, write down the **unique purpose or purposes of your team**.
- In the second column, write down **whom your team serves**: What are the people like and what are their interests?
- In the third column, write down the kinds of activities that your team could engage in to fulfill its purpose by serving this community? What is the **unique work that your team could do**?

Chart your Individual Responses

WHAT?	WHO?	HOW?
Our team's shared purpose is to...	The constituency we organize is...	We will achieve our shared purpose by...
<i>(briefly describe your team's unique reason for coming together)</i>	<i>(briefly describe your constituency's characteristics)</i>	<i>(list the specific activities that your team would undertake)</i>

After brainstorming answers to all three questions, take a few moments to write a sentence that you think best describes your team's purpose, its constituency, and its activities. Draw on all three columns above.

Examples of a shared purpose sentence:

We share the purpose of educational justice by organizing high school students in Milwaukee to develop their capacity for collective action through providing them with coaching, training, and mentoring.

We share the purpose of gaining water access for organic farming by organizing farmers and community activists through holding 1:1 meetings, community meetings, proposing and passing legislation.

Step 2: Team Work (7 minutes)

As each person reads their sentence, the facilitator notes the key words on the wall poster under purpose, constituency, or work. Note specific words to which you respond, that spark your curiosity, or that give you energy. When you are done, your facilitator circles the words that seem to resonate most strongly with your team.

Our team's shared purpose is to:

Step 3: Individual Work (3 minutes)

In light of what you learned from the last session, write a new sentence that you think can articulate a shared purpose, using some of the key words and themes.

YOUR draft Our team's shared purpose is to:

Step 4: Team Work (5 minutes)

We will read our sentences again and choose—or combine—one that can best articulate the shared sense of your team.

Final Team draft Our team's shared purpose is to:



WORKSHEET:
DEVELOPING TEAM NORMS

Agenda: Total Time: **10 minutes**

Review the sample team norms below. Add, subtract or modify to create norms for your team. Be sure to include group norms on each theme below and how you will self-correct if the norm is broken. (If you don't self-correct, the new norm will be breaking the norms.)

Decision-making: <i>What is the process by which we will make decisions?</i>	
• Majority rules: Whatever gets the most votes wins. • Consensus: Everyone must agree. • Delegation: Nominate one or two people on your team to be the ultimate decision-makers. ○ Coin flip: Leave the decision to fate! ○ Other:	
Discussion and Decision-making: <i>How we will discuss options and reach decisions as a team to ensure vigorous input and debate?</i>	
<u>Always Do</u> Engage in open, honest debate Ask open-ended questions Balance advocacy with inquiry	<u>Never Do</u> Engage in personal attacks Fail to listen to what others say Jump to conclusions
Meeting Management: <i>How will we manage meetings to respect each other's time?</i>	
<u>Always Do</u> Start on time; stay on time Be fully present throughout the meeting	<u>Never Do</u> Come to meetings unprepared Answer cell phones or do email
Accountability: <i>How we will delegate responsibilities for actions and activities? How will we follow through on commitments?</i>	
<u>Always Do</u> Clarify understanding Provide follow-up on action items Ask for/offer support when there is a need Weekly check-in	<u>Never Do</u> Assume you have agreement Assume tasks are getting done Commit to a task that you know you won't do
How will you "self-correct" if norms are not followed? Teams work best when you have a regular, reliable time to coordinate together. What will your team's regular meeting time and place be?	



WORKSHEET:
DEVELOPING TEAM ROLES

Agenda: Total Time: **8 minutes**

Review the Team Coordinator role below as an example of what roles might look like in your individual campaigns. Thinking about how you should organize the next event/meeting, discuss how your roles would fit together to create an interdependent leadership team that supports one another in your individual projects. What would each role have to be good at?

Based on the discussion about the roles, **go around the circle** and ask each person to tell others:

1. What experience and talents they have that might contribute to the leadership team
(30 sec.)
2. What specifically they want to learn in more detail (30 sec.)

How might these talents match up to particular roles? Are there any clear “fits?” Note: These team roles should not be seen as permanent. For the team to be strong, all leaders should have to earn leadership by carrying out responsibilities relevant to the role they seek.

ROLE	RESPONSIBILITIES	YOU WOULD BE GOOD FOR THIS ROLE IF YOU...	INTERESTED TEAM MEMBERS & RELATED SKILLS/TALENTS
<i>Ex. Team Lead</i>	<i>Coordinate the work of the leadership team. Prepare for meetings; give support and coaching to the team.</i>	Organized, experienced, good people skills, can make good snacks	Jesse, Queenie, Vera
Ex. Communications	<i>Coordinates the messages sent out to other people in the campaign.</i>	Access to technology, good design skills, attention to detail	Jorge, Mia, Jack

Your Team Workspace

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

Team Name & Chant (5 min.)

Team Roster:

NAME PHONE EMAIL ADDRESS

Leader-Powered Organizing Exercise: Leaders organizing a base and new leaders.

Key elements of member-powered organizing:

Leadership

- Shared Narrative and Message
- Clear, Shared Purpose, Values + Vision
- Strong, Skilled and Committed Leadership
- Relationship-Centered Organizing

Base Building

- Pathway of Deeper Engagement + Empowering Action
- Community Building to Scale
- Consistent Organizing Communication
- Data Management and Systems

1 - Leader: A leader is a member that actively organizes to grow the membership and drive campaigns. They cover a base of members, take a leadership role in planning and facilitating actions, committee meetings, trainings and campaign events.

2 - Activist/Active Members : A member who consistently participates in actions, committees, events and trainings online and in person in a non-leadership capacity. They believe in what we do and assist in helping us be successful at expanding our reach. An activist is invested in the success of our organization, helps get our message out to others, participates in events but does not yet lead.

3 - General Member : A member believes in the mission and goals of our organization and understands the importance of our organizing efforts. These individuals do not always consistently attend meetings or events but stay connected to the organization.

4 - Contact: People who have a phone, email or address in your database.

.....
Supporter : People who support your cause. You might not have their contact base.

Constituent: People who you want to organize into your base.

Public: The broader audience of people who you want to support your cause.

PART I: Leadership Development

1. Demands, Public Narrative, Shared Purpose + Vision	What are your campaign's demands? What is your public narrative that drives the campaign? What is the shared purpose and vision that drives the organizing? What is your organizing message that shows that people need to play a vital role in change?
2. Values, Bridging, Bonding	What are the values that ground and guide your organizing? How will you navigate differences in cultural and political values? How is racial justice centered in your approach?
3. Strong Leadership	Who should the leaders be within this scenario? What is the role of leaders in the campaign? How will you identify leaders for this campaign? What are the qualities needed in leadership?
4. Organizing Committee	What is the role of the organizing committee in this campaign? What is the criteria to join the leadership team/committee? What are the responsibilities of the committee? How do they work together? What level of engagement and commitment will be needed for a successful organizing committee? What is the role of the paid organizer? What is not their role?

5. Skilled, Committed Leadership	What skills or leadership development is needed to develop leaders in the committee and campaign? How will you build strong committed leadership? What approach to political education and training on racial justice will you incorporate? How will you cultivate shared, deeply felt values?
Part II: Base Building	

Ella Baker's Legacy: A Different Model of Leadership

As a community organizer, Ella Baker brought a different style of leadership to the civil rights movement—one that contrasted with the traditional model that celebrated a few charismatic individuals. Baker believed in deemphasizing top organizational figureheads and instead cultivating the abilities of everyday people to collectively join together and take action. She upheld the idea that organizations should be run by those most impacted by the problems the organization is trying to solve.

In a June 12, 2015 article in Colorlines, Barbara Ransby discussed Baker's approach to leadership:

Although she objected to the top-down, predominately male leadership structures that were typical of groups like the Southern Christian Leadership Council (SCLC) and the NAACP in the 1950s and '60s, she realized the necessity for grounded, community-based leader-organizers such as sharecropper Fannie Lou Hamer and Cleveland, Mississippi-based local organizer Amzie Moore. Baker was not against leadership. She was opposed to hierarchical leadership that disempowered the masses and further privileged the already privileged.

When Oprah Winfrey complained that recent protests against police violence lack leadership, she was describing [Martin Luther King's] style of leading, or at least the way in which the King legacy has been most widely branded: the reverend as the strong, all-knowing, slightly imperfect but still not-like-us type of leader.

Baker represented a different leadership tradition altogether. She combined the generic concept of leadership—“a process of social influence in which a person can enlist the aid and support of others in the accomplishment of a common task”—and a confidence in the wisdom of ordinary people to define their problems and imagine solutions. Baker helped everyday people channel and congeal their collective power to resist oppression and fight for sustainable, transformative change....

That collective effort required leaders who were accountable to one another and were not singular. There were many organizers in groups such as SNCC who modeled Baker's brand of what sociologist Charles Payne has called “group-centered leadership.”

Rather than someone with a fancy title standing at a podium speaking for or to the people, group-centered leaders are at the center of many concentric circles. They strengthen the group, forge consensus and negotiate a way forward. That kind of leadership is impactful, democratic, and, I would argue, more radical and sustainable, than the alternatives.

<https://www.colorlines.com/articles/ella-taught-me-shattering-myth-leaderless-movement>

Another way in which Baker's leadership style contrasted with the norm within many civil rights organizations was her emphasis on valuing the contributions of women. Baker was opinionated and outspoken, even when social norms held that women should be quiet and deferential. At both the SCLC

and NAACP, she protested the fact that formal power rested in the hands of men, who almost exclusively were given top offices, while women were relegated to support roles.

Congressperson John Lewis, himself a prominent civil rights activist, wrote in his memoir *Walking with the Wind*: “Long before people began using the term ‘male chauvinism,’ Ella Baker was describing it and denouncing it in the civil rights movement, and she was right. There were very, very few women getting credit for their work, and even fewer emerged into leadership positions.”

In a January 16, 2017 article for *Time* magazine, journalist Julie Scelfo notes that the prevalence of sexism, even within the movement, may be one reason that Baker is less well-known today than she might be otherwise:

Despite her level of experience and proven track record, [Martin Luther King, Jr.] had difficulty allowing a woman’s decisions to trump his own, and her idea was that the organization should devote its resources more to promoting and enabling its overall mission rather than celebrating a charismatic leader. Wyatt Tee Walker, an early SCLC board member, told the filmmaker Joanne Grant that the ministers’ refusal to follow Baker’s advice was in practice with the era’s norms. “This was before the days of women’s liberation,” he says in the 1981 film [Fundi: The Story of Ella Baker](#)....

Despite Baker’s gifts for leadership and oratory, the SCLC pastors, intent on preserving their patriarchal hierarchy, refused to allow her to share in their prestige.

<https://time.com/4633460/mlk-day-ella-baker/>

Scelfo goes on to discuss another reason why Ella Baker may be less well-known and widely celebrated today than some other civil rights activists:

Baker spent years of her life performing the essential—but far from glamorous—act of listening, a crucial first step in helping beleaguered Blacks develop enough self-worth to demand being treated with dignity in an environment where they had every reason to fear brutality and economic reprisal from their white neighbors. She also understood group dynamics and how to empower people to join forces, a delicate task that involves responding to a wide array of human feelings.

A narrative about this kind of work is inherently less dramatic and far more complicated than, say, the tale of a discreet act of bravery on a bus. But great leaders have recognized for centuries that high emotional intelligence, or the ability to recognize and respond to other people’s feelings, is central to successfully influencing them.

<https://time.com/4633460/mlk-day-ella-baker/>

Baker possessed this type of intelligence and infused it into her approach to organizing. In doing so, she paved the way for many young people and women to grow in their own leadership.

Today, her legacy can be seen in organizations like Black Lives Matter, which promote a “leaderful” and feminist style of organizing. Because of this, Baker not only helped change the world, she changed how people went about changing the world.

Marino Strategies

Creating Effective Committees

- [Committee Building Plan](#)
- [Key Principles](#)
- [Assessment Scale](#)

Committee Building Plan

Please review the principles and assessment scale below, and then follow these steps to make a committee building plan:

- Committee vision:
 - Define the goal of the committee. How does it support the campaign? How does it build community power?
 - What activities will the committee be responsible for?
 - What level of engagement will be needed for a successful committee?
 - Do you have some ideas about the skills or knowledge you want to train your committee?
- Identifying your base:
 - Make sure you have a list of all of the people you want to engage, including all the info you have about them
 - Combine the lists as needed.
- Assessing your strength:
 - Rate each member on your list based on their current level of engagement. See the assessment scale below.

¹ Please obtain permission to use beyond your organization from carrie@marinostrategies.org

- Create a “potential leader” column and mark x for who you want to prioritize for organizing.
- Working with leaders
 - Next step is to invite your leaders to join the committee and put the leaders into a group together.
 - Ask them to make a commitment to each other to do this work. This could include a customized committee agreement.

Key Principles

1. Encourage members to invite their co-workers/ friends/ family/ neighbors. People are more likely to attend and stay involved when they are invited by someone they know and trust.
2. Leaders build power when they make a commitment to one another to work together for their shared goal with an aligned strategy that they all take responsibility for achieving. Each leader should be called upon to make a commitment to learn the skills to organize and campaign, work through and overcome challenges, and be transparent and accountable to each other.
3. Committees are meant to bring people together to identify issues and strategically problem solve or create campaigns to bring about solutions. Use this time together to map out the issues that your leaders are dealing with and identify the decision makers on the issue. Support your leaders in discussing the issue and ways that we can work together to bring about change.
4. Ensure that you are focusing on the right issue(s), leader buy-in is extremely important to the committee’s success.
5. Support leaders in taking leadership roles in these spaces. Give everyone the space they need to contribute in ways they feel comfortable, while encouraging participation from everyone. Organizers and members alike should be devoted to monitoring the space to ensure that it remains safe and inclusive.
6. Ensure that your committee has a clear purpose and that all leaders involved understand what it is. The purpose and committee description should be written

down and accessible so that it constantly grounds us in the work that needs to be done.

7. The committee should participate in the development of the campaign plan in collaboration with staff and partners. They will need to be invested in the plan because they will fuel the campaign. The organizer needs to surface decisions within the committee and guide the committee on weighing options for adjusting strategy when opportunities arise or the terrain changes.
8. Ensure that the committee meetings are well run, there should be an agenda, group commitments, the meeting should start and end on time, there should be clarity of the decision making process and should always end with an action plan or next steps.
9. Assign roles for each committee, for example committee chair/ co chairs or small circle facilitator, timekeeper, secretary/note taker etc.
10. Ensure that committees are leader led and facilitated with strong support from organizers, this ensures that issues and campaign paths are organically generated from the base.
11. Be intentional about each committee member's developmental needs and provide the tools and support they need to succeed.
12. Utilize committee meetings to train leaders on core skills for organizing, advocacy, campaigns, actions. Regular meetings can be a great way to steadily prepare leaders for the fight they will have or are already engage in.

Assessment Scale

1 - Leader: A leader is a member that actively organizes to grow the membership and drive campaigns. They cover a base of members, take a leadership role in planning and facilitating actions, committee meetings, trainings and campaign events.

2 - Activist/Active Members : A member who consistently participates in actions, committees, events and trainings online and in person in a leadership capacity. They believe in what we do and assist in helping us be successful at expanding our reach. An activist is invested in the success of our organization, helps get our message out to others, participates in events but does not yet lead.

3 - Supporter/General Member : A supporter believes in the mission and goals of our organization and understands the importance of our organizing efforts. These individuals do not consistently attend meetings or events but stay connected to the organization.

4 - Network : New contacts or people who are not active.



WHAT'S THE REAL PROBLEM?

Your workplace may feel like it's bogged down in “apathy,” but under the surface, there's always something else going on. Here are some ways to understand what looks like apathy and respond to it.

“NO ONE SEEMS TO CARE.”

What's going on: Everyone cares about something—but the something might not be what you expect.

- The issue you're focused on might not be a priority for your co-worker.
- She might feel strongly about other issues that haven't caught your attention.
- She might assume her problem isn't your issue, or isn't a union issue.

What to do: Listen.

- Pick a few co-workers you'd like to know better. Make a point of talking with them to find out what's on their minds.
- Show respect and understanding for the issues your co-workers care about, and they'll be more likely to do the same for you.

“IT'S HARD TO SEE HOW THINGS COULD CHANGE.”

What's going on: Your co-workers don't believe that they have power—yet.

- Most people have always
- Most people have always felt powerless and disorganized at work. They've never felt strength in numbers.
- Problems seem too big to tackle.
- The boss has cemented the idea that his decisions are final.

What to do: Inspire your co-workers. Show them that change is possible if you work together.

- Bring people together. Group support can help build hope.
- Start small. Look for fights you can win with the people you have on board so far. When a tiny campaign gets results, more people will be drawn in, and their confidence will grow.
- Develop a credible plan to win. Ask, “What solution are we proposing?” “Who in management has the authority to say yes?” “What could we do together to get that person to say yes?”
- Share stories of tactics that have worked elsewhere.



“NO ONE’S WILLING TO DO ANYTHING.”

What’s going on: Many people won’t initiate activity, but they might respond if asked directly by someone they trust.

What to do: Figure out small, specific requests. Approach co-workers personally.

- Respect the time constraints in your co-workers’ lives.
- Show lots of appreciation for anything they’re willing to do.
- Make it clear that any victories were won by the whole team.

“NO ONE COMES TO MEETINGS.”

What’s going on: People won’t be motivated to come unless they feel their participation matters.

- If a meeting is just to “get information,” it’s easy to skip it.
- An email or a notice on the bulletin board usually won’t inspire people to attend.

What to do: Give your co-workers meaningful roles. Let them know how their presence or absence will affect issues they care about.

- Make the meeting pleasant and productive. Prepare a clear agenda, a time limit, and a reason to attend, such as a hot issue.
- Face-to-face invitations are best. Divide up your workplace and find several other people to share the work of inviting people individually.
- Consider the practical things that can make meetings more accessible: scheduling, location, childcare, translation, transportation.
- Be flexible. Sometimes people simply can’t make it to meetings, but they can still play crucial roles in organizing while they’re at work.

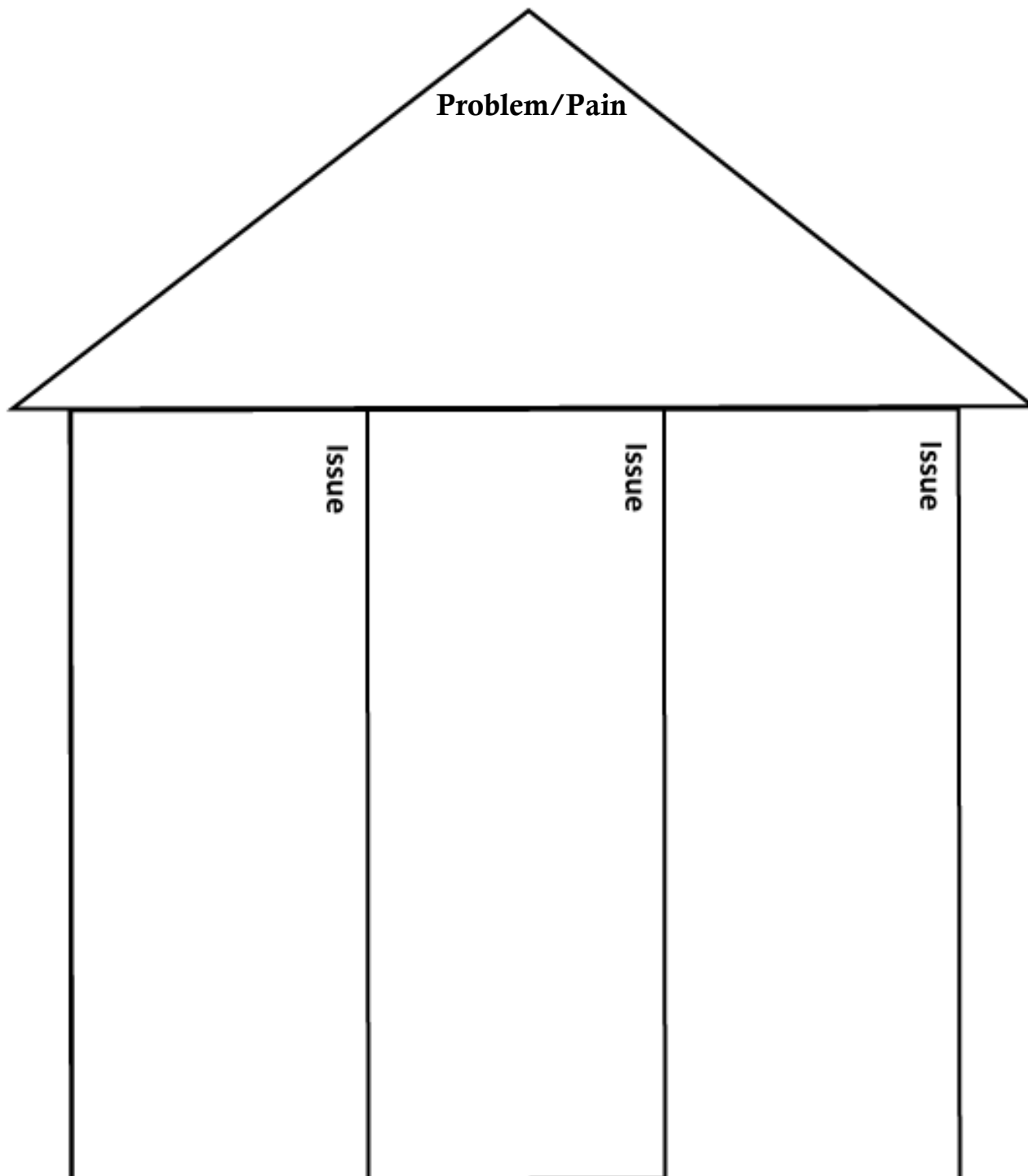


Problems vs. Issues:

Problems are statements of the world as it is. **“There is no respect for educators in this building.”**

Issues are a diagnosis of the problem that almost indicates what the solution is. **“There are no recognized structures in this building that allow educators to be part of decision making.”**

Take some time to first brainstorm the pain and/or problems our people are feeling. Then work to identify the issues within that problem that are causing the pain. Asking, “why do you think this is the way it is?” can move you into an analysis of issues that make up the problem.





A GOOD ORGANIZING ISSUE

- **Is widely felt.** How common is the problem? How many workers face this situation? Many people must feel that this is a real problem and agree with the solution you're pursuing.
- **Is deeply felt.** Is this an issue that people feel strongly enough about to actually do something? It's not enough that many people agree, if none are really hot under the collar.
- **Is winnable.** It's hard to know for sure whether you *will* win, but it's possible to have a good idea whether you *can*. Your group should match your demand to the power you've already got.

To win, you'll need to make it harder for the decision-maker to keep saying no than to say yes. The more pressure you can bring to bear, the more issues will become winnable.

- **Builds the union and builds leaders.** Consider how this fight will build your capacity for future fights. Will the issue attract leaders or groups who haven't been very involved? Will it build solidarity between groups? Will it give you the chance to try an action that's one step beyond what you've done before? Will the solution lay the groundwork for future improvements?

Each fight should build off the last. It often happens that we don't win the concrete gain wanted, but we do come out smarter and better organized—which makes it more likely we can win next time.

- **Has a connection to students and the public.** If the issue affects students, parents and community, it grows your potential group of activists and the potential support.



Issue Criteria Check List:

Score each Issue from 1 to 3 (1 = No, 2 = Unsure, 3 = Yes) on the specific criteria then total your scores and compare with your team.

Will the Issue...	Issue #1	Issue #2	Issue #3
1. Result in a real improvement in people's lives?			
2. Give people a sense of their own power?			
3. Alter the relations of power?			
4. Be worthwhile?			
5. Be winnable?			
6. Be widely felt?			
7. Be deeply felt?			
8. Be easy to understand?			
9. Have a clear target?			
10. Have a clear timeframe that works for you?			
11. Be non-divisive?			
12. Build leadership?			
13. Set your organization up for the next campaign?			
14. Increase membership?			
15. Be consistent with your values and vision?			
16.			
TOTALS			

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