



Coaches Academy



Participant Handouts

The Campaign Lab is an intentional organizing and capacity building strategy. It is about changing how locals, leaders, and members engage with their union and participate in the change they want to see in the world. What makes Campaign Lab different from other strategies is the coaching structure. Each team lead is promised a campaign coach that helps them plan, implement and assess their local campaigns. As coaches, we are supporting leaders as a whole person. We can deepen a leader's vision, determination, and capacity to lead. As Campaign Lab Coaches, we are guides to support the Team Lead to be rigorous about the process of building a strong union and campaign.

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Community Agreements for Our Time 2026-27 Program Year

Encourage and Practice Awareness and Self-Knowledge

This work requires self-knowledge and self-awareness. Self-knowledge allows you to see the triggers that can lead to pain and conflict, enabling you to embrace your contradictions and inconsistencies. It allows the space to work on things that you are not happy with about yourself. In turn, self-awareness helps to prevent you from projecting negativity onto other people. By engaging in self-reflection, you contribute to a learning environment rooted in awareness, accountability, and shared purpose.

Bringing your best self also requires that you have an attitude of curiosity, are willing to deeply explore your perspectives, and remain open to the perspectives and experiences of others. While engaging with peers and content, remember to 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, avoiding interruptions, reflecting your understanding, clarifying information, summarizing the other person's perspectives, and/or sharing your own. Remember that we all arrive in this space socialized about what active listening "looks like."

Be open to how others may be signaling that they are listening and be aware that it might look different than how you were socialized. This can help contribute to the development of a space that is brave enough for us to learn together. 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 Kind and Gracious

Being kind is a vital way of bringing meaning to our own lives and to the lives of others. Kindness is about caring genuinely for those 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, to be more self-compassionate, and to be a positive force in other people's lives.

Being gracious includes following best practices to protect the health of this learning community (eg; avoiding known allergens (scents, foods, etc.), handwashing, using PPE, staying in your room if you are sick).

Being gracious is strongly informed by your own relationship with privilege. Being gracious and kind means not weaponizing your privilege against people who hold more marginalized identities in our space. Instead, use your privilege to support colleagues whose identities yield less privilege than yours. We are gracious when we accept and genuinely work to use the pronouns that others ask us to use. Please consider how your own and others' intersectionality and relationship with privilege may be showing up when you and others offer grace.

As you take your lessons with you when you leave, part of being gracious is keeping folks' personal stories within the learning space.

Staying Engaged

Staying engaged requires you to be fully involved in the conversation. Staying engaged means that you are listening with curiosity and are willing to deepen your understanding. Staying engaged might also require you to sustain the conversation even when it gets uncomfortable or diverted. By actively staying engaged, you are helping to contribute to the creation of a space that is brave enough to allow for learning. This means a commitment to keeping your electronic communications to a minimum with people not present in this learning community. This also means being present for all portions of the learning agenda. If needs (personal or professional) external to the learning experience arise, you commit to moving away from the learning space, addressing the emergency, and then returning ready to re-engage.

Staying Curious and Suspending Judgement

Staying curious and suspending judgement includes being receptive to the perspective of others. You enter this space carrying lived experiences, emotions, and internal narratives that shape how you hear, interpret, and respond. These responses may be influenced by bias—conscious or unconscious—as well as thoughts or feelings not directly connected to what is happening in the room.

You can suspend judgment by reflecting on preconceived notions and listening to everything someone has to say before responding. When something feels uncomfortable, personal, or activating, you commit to pausing, noticing, and approaching your reactions with curiosity rather than judgment. Rather than disengaging, withdrawing, or assuming harm or targeting, ask yourself *What might be influencing my reaction right now?*

Most importantly, suspending judgment also means listening to what the speaker has to say for understanding, not only to determine whether the speaker is right or wrong. This means that you recognize that we all make mistakes and that we have the capacity to grow. You recognize that growth requires attention not only to the words you are hearing, but to how you are receiving them.

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 honest and candid about your own thoughts, feelings, experiences, and opinions and not just say what you perceive others want to hear. If you are thinking it, maybe, just say it instead of waiting to add it to the feedback. Speaking your truth will require you to speak from the “first person” and use “I” statements.

Leaning into Discomfort

Leaning into discomfort will require you to let go of understandings and stereotypes that you may be holding in order to move forward. You take responsibility for practicing self-regulation, staying present, looking for opportunities to take a risk, and seeking understanding. Remain open long enough to fully hear both what is being said, as well as how it is being communicated.

Leaning into discomfort may require you to sit through moments of embarrassment, confusion, anxiety, and/or fear. Leaning in can be highly informed by your own relationship with privilege and can be weaponized against people who hold more marginalized identities in our space. There are times when recognizing your privilege means moving back, and making space for those who are too often marginalized.

Expecting Non-Resolution and Non-Closure

Expect and accept that there may not be closure. For example, 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 complex issues with another person, the more you both will learn. Authentic and productive conversations about issues where 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.

When appropriate, you may engage, briefly dis-engage, or re-engage by sharing perspectives grounded in reflection, curiosity, and a growth mindset. In holding tension between non-resolution/non-closure and opportunities for engagement/re-engagement, you contribute to dialogue in ways that build understanding rather than shut it down.

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

Reflective Questions to Complete Prior to Attending Your Academy

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?

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.

What is Campaign Coaching

What is Campaign Coaching?	What is it not?
Using mostly questions, observations, personal stories, and sometimes advice to help campaign leads clarify their thoughts and figure out next steps to achieving their goals.	Being the technical expert that does all the talking. Always giving advice.
Helping campaign leads understand "what's going on beneath the surface" of their problems so that they find a way forward.	Being a lead organizer. You are not responsible for the work of the campaign, including meetings or campaign plans {although you should help the lead think through being successful at those things}.
Holding the campaign lead accountable for meeting their goals but also holding space for them to struggle productively in the work.	Acting as a therapist. Make space for the lead to voice their fears and frustrations but make sure to pivot at a certain point to figuring out what they can do to change their situation.
Encouraging campaign leads to keep going by reminding them of the good work they have done so far and the difference that their work is making.	Only listening to the campaign lead. Coaching sessions should have an agenda and outcomes that the coach has an active role in helping the lead achieve.

What stands out to you as a Campaign Coach?

Centering Equity Scenario: Whose Voice Shapes the Campaign?

The River City Educators Association (RCEA) is preparing for a major campaign focused on educator workload, staffing shortages, and improving learning conditions. The campaign is grounded in the union's long-term vision for public education and has the potential to become one of the organization's biggest organizing efforts in recent years.

As leaders begin planning the campaign, a concern emerges during a strategy meeting.

Several Education Support Professionals (ESPs), early career educators, and educators of color report that their experiences are not being reflected in the campaign's priorities. While all members are experiencing workload pressures, they describe significant differences in how those pressures are felt across the district.

Paraeducators explain that many work multiple jobs because salaries have not kept pace with living costs. Educators in schools serving large numbers of low-income students report chronic staff vacancies and increased student needs. Some educators of color describe being asked to take on additional responsibilities involving student discipline, translation, cultural mediation, and mentoring while receiving little recognition or support for that labor.

When campaign surveys were distributed, participation was strongest among long-time activists and educators in schools with highly engaged building representatives. Participation rates were much lower among ESps, educators in several high-needs schools, and members who had not previously been involved in union activities.

At the next executive board meeting, differing perspectives emerge.

Some leaders argue that the union should focus on issues that unite all members and avoid highlighting differences between groups. They believe the campaign will be strongest if it emphasizes universal concerns such as workload, compensation, and staffing.

Others argue that a campaign cannot truly improve conditions for everyone unless it intentionally addresses the ways race, class, gender, job classification, and school assignments shape members' experiences. They believe the people most affected by inequities should help define campaign demands and play visible leadership roles throughout the effort.

Several coalition partners who participated in the union's visioning process have also raised concerns. Community organizations working with families note that many of the schools experiencing the most severe staffing shortages primarily serve students from historically marginalized communities. These partners are encouraging the union to engage families and affected educators in deeper conversations before finalizing campaign demands.

The campaign planning committee must now decide:

How can the union build a campaign that addresses shared concerns while also centering the experiences, leadership, and priorities of members and communities most impacted by inequities?

Discussion Using the Centering Equity Tool

Problems

- What inequities do you notice in this scenario?
- Who is most affected by the current conditions?
- Who benefits and who is harmed by how the campaign is currently being planned?

Causes

- What policies, practices, traditions, or assumptions may be contributing to these inequities?
- What organizational habits might be leaving some members out of campaign planning?

History

- How might past organizing approaches have contributed to the current situation?
- Are these inequities new, or do they reflect longer-standing patterns?

Solutions

- What campaign demands would address root causes rather than symptoms?
- How would different groups of members be impacted by those solutions?

Strategies

- What organizing strategies could ensure broader participation and equity?
- How can the union engage members who have not traditionally participated?

Leadership

- Who is most directly affected by these issues?
- Are those members helping define the campaign?
- What leadership roles could they play?
- Who has been left out, and how can they be directly engaged?

Additional Equity Questions

- How do the campaign's demands center race, class, and gender justice?

Centering Equity in your Campaigns

What does it mean to center equity in Union Work?

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 your union work centers 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?	

Sample Coaching Questions

Questions for Sharpening Assessments

- How do you know that? What kind of evidence do you have?
- When have you seen that happen?
- What would have to happen to change that?
- If you say “yes” to this opportunity, what will you have to say “no” to in order to pull it off?

Questions for Getting Under the Surface

- You mentioned a challenge your team is dealing with. Let’s slow down a bit. What else might be going on here? What aspect is harder to talk about, but is also here?
- Sounds like (this person) has been challenging. If there were a challenge underneath this one dynamic, that might be a bigger pattern or question for us, what would it be?
- We’ve covered the urgent challenges rising to the surface this week. But I want to make sure to check in about “the bigger picture”. In the grand scheme of the campaign, what other things are important for us to spend time on?

Questions for Prioritizing

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

Questions for Centering Equity

- Who is most directly impacted? Who has been left out? How can they be directly engaged? How do your demands center race, class, and gender justice?
- 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?
- What inequities are you noticing or experiencing? What are the impacts on different groups? Who benefits most and who is hurt most?
- What institutions, policies, or practices are causing or contributing to the inequities? What social norms, popular myths, or cultural biases may be contributing?
- How did things get this way and are things worsening or improving?
- What solutions could address the root causes and eliminate the inequities? How would different racial groups be impacted by the proposed solutions?
- What strategies and actions could be used to advance the solutions?

Coaching Observations and Notes Template

Use this template to record your observations, gut responses, and possible questions when you are meeting with your campaign lead.

My Observations

Team discouraged by getting a no from a secondary target they thought would be an easy yes.

My “Gut Response”

“Why is this such a big deal? Let’s move on!”

A Curiosity Underneath

“Is there something I’m missing about what it means to them?”

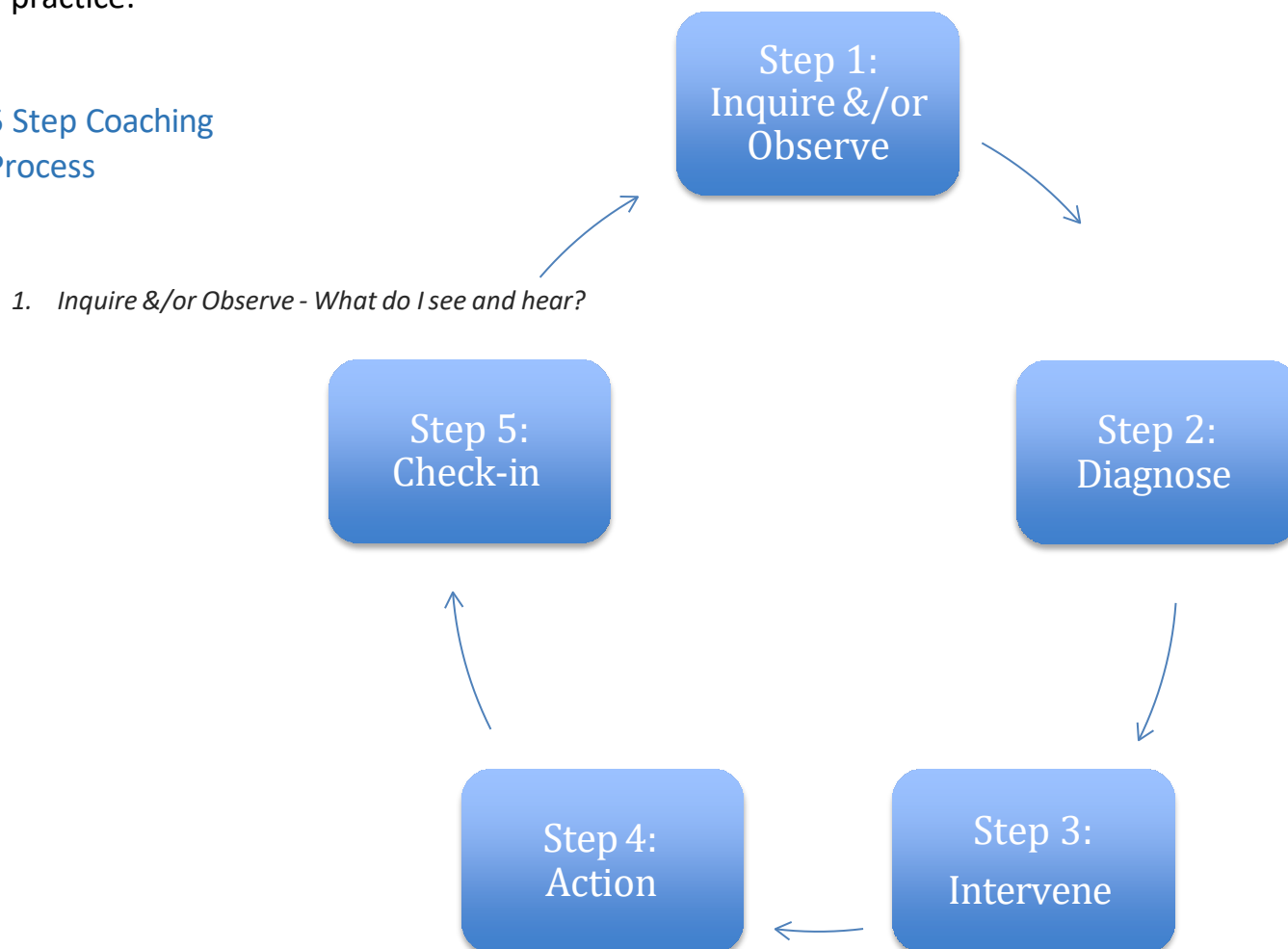
A Question I Could Ask

“It seems like this was a big disappointment for you all. I want to know more about how it landed for you. What felt ‘big’ about it to you?”

“And what would it take to feel like ‘we’re on the right track’ again?”

Following this simple, 5 step coaching process can help you dive in and begin your coaching practice:

5 Step Coaching Process



When you are observing a person's actions in the field or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. As a coach, you need to take time to dig deeper. Are you seeing all the angles here? What information is missing? Think about the "who, what, why, how, where, when" questions.

- **Motivational (heart):** Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she's embarrassed? Is he quitting too soon because of frustration or fear?
- **Strategic (head):** Is the individual struggling because the goals are not achievable? Or because they're not thinking creatively enough about how to use the resources they have to meet goals? Or because the overall strategy doesn't make sense and needs to be clarified or adapted to their situation?
- **Skills-based (hands):** Is the individual struggling because of not being able to muster the behavioral skill to execute effectively? Does he not have the skill in his repertoire? Is he getting interference from other habits and behaviors (like someone well-versed in marketing speak may think that skill set is a substitute for authentic story-telling skills)? Is there something you could model, or that this person that just needs more help practicing and debriefing?

2. Diagnose & 3. Intervene: Which form of coaching does this require?

		
If your diagnosis is that the individual needs to put in more intense effort, choose a motivational intervention, – for example:	If your diagnosis is that the individual is not understanding the focal practice adequately, or thinking about it appropriately, choose a strategic intervention – for example:	If your diagnosis is that the individual lacks execution skill, choose an educational intervention – for example:
○ Encouragement and enthusiasm—you can do it! ○ Helping the individual understand and confront fear, embarrassment, or other emotions that get in the way of the willingness to try harder or persist in the face of setback ○ Incentivizing, rewarding and praising courage ○ Modeling courage and emotional maturity in your own behavior, confessing fear and explaining how you move toward it rather than away ○ Kick in the pants (offered with love) ○ What else?	○ Asking good questions about how the individual is thinking about the key leadership practice – “Why did you choose to do this and not that?” – Based on where you are now what resources could you draw on to take this story/team/strategy to the next level? ○ Offering your assertions about what you are observing and how you think the individual might fruitfully think about the practice differently – “When you stop at that angry point in the story, I think you may be forgetting that your listeners need a reason to hope in order to be called to action.” ○ Offering the opportunity for silent reflection and self-diagnosis – “Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”	○ Model the behavior and invite the coaches to imitate you or work side by side with you to get the “feel” of the activity ○ Break it down into smaller parts and invite the individual to try one at a time ○ Practice, feedback, repeat ○ Offer three or four different practice exercises and observe which ones “take” for that person ○ Repetition, repetition, repetition ○ What else?

3. Intervention - What do I do?

Once you think you've figured out what the problem is don't just tell the coachee what you think they should do! Find out what they think they should do? Ask questions that enable the coachee to see the problem, and for you to see how the coachee sees the problem, and discern a way to solve it. Get the coachee's views out on the table. The appropriate intervention depends on the diagnosis.

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

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

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

- Work through a specific example with the person, asking questions to guide the strategic process. Then reflect on the process itself, asking them to describe how it worked?
- Ask questions about how the individual is thinking about the practice ("Why did you choose that tactic?")
- Offer your observations, asking how the person might think about it differently ("At that point, were there other options? What might they have been? Why did you choose the one you did?")
- Offer feedback on what you are hearing, asking if that describes the situation, at the same time, offering possible reframing of it.

Use silent reflection and self-diagnosis ("Why don't you take a moment to think through what you believe is working and not working and let's talk about that?").

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

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

3. Intervention Continued- What do I do?

Coaches have plenty of Interventions for helping strategists-in-training develop insights, identify more options “under the bright lights” of an active campaign and develop strong organizing teams. And we think five interventions are most useful for helping develop organizers as campaign strategists: Inter

- **Questions** – What’s the insight you want to *tell* someone? You can almost always reverse engineer a *question* that might lead them to discover it for themselves.
- **Observations** – Sometimes drawing attention and inviting curiosity to a key dynamic you’re noticing is enough to generate learning.
- **Stories** – “We don’t know what we don’t know,” and your stories about having traveled similar paths will help your coachees sidestep common stumbles, identify options available to them, and your stories of unexpected victory will inspire their confidence and motivate them to keep moving forward
- **Feedback** – Sometimes your honest assessments, paired with an empathetic suggestion, are what will most help your coachees move forward: *“I’m really worried this is going to come off wrong, but I see you getting in your own way, by constantly focusing on what’s not working here. I’ve been there! We’re often surrounded by negativity in our school buildings. But unless you find a way to focus on what’s going right, I don’t think a lot more coworkers are going to say ‘yes’ to taking action...”*
- **Suggestions/Advice** – Advice is the least likely to develop our coachees into strategists, capable of making the many assessment-driven decisions needed in the “heat” of any campaign. But there are moments when our suggestions are what’s needed, particularly when “coaching for performance” rather than “coaching for learning.”

Tell stories & ask questions to...

- Help them imagine “getting to the playoffs”
- Help them remember their “stake”
- Cheerlead to “the finish line”
- Gain awareness of their strengths and how they’re overcoming challenges
- Reflect on what they’re learning

Offer observations to

- Help them notice “what’s going *right* here”
- Boost their confidence
- Notice what’s going on with other “teams”
- Acknowledge challenges, effort, persistence

3. Intervention - Selecting Stories & Anecdotes

We encourage campaign coaches to periodically review stories we can bring to coaching sessions that might inspire new insights or sharpen our coachees' strategic thinking. **Here are some “cues” for searching through the stories you know:**

- The political geography of this particular place
- The composition of this group (identity, roles, (un)willingness to take risks)
- The target selection challenge they're currently facing
 - Go after the “villain”, our opponent
 - Focus on a target who is currently “neutral”
- Hesitation to engage in conflict with a target
- The unexpected alliances that formed in the “heat” of a campaign
- The relative strength or weakness of the targets themselves
- The need to recruit a new constituency in order to build the power to win
- The campaigning “posture” or tone (playful, confrontational, “cheering on” targets, determined, etc.)

Craft of Campaigns Podcast

Stories and lessons from issue-based action campaigns, beyond one-off mobilizations and single election cycles. In each episode, we interview organizers about how a campaign unfolded, strategy decisions, and lessons for our current moment. Each episode includes a transcript and writeup of key take-aways.



S2 E2: Stephen Lerner on Justice for Janitors: A comeback story that continues today

S2E2: Stephen Lerner on Justice for Janitors: A comeback story that cor
Craft of Campaigns



00:00:00 | 01:07:46



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More Info

Share



S1 E2: Tara Raghuveer on hijacking Kansas City's elections by being “ruthless” about basebuilding

S1E2: Tara Raghuveer on hijacking Kansas City's elections by being “ruth
Craft of Campaigns



00:00:00 | 01:09:49



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More Info

Share

4. *Action: How can I allow the coaches to develop their leadership*

skills? What action will they take that would allow them to move forward?

- Avoid the urge to do it for them.
- Allow the coaches to try the intervention.
- Observe them in action and note observations for your debrief.

5. *Check-in and Debrief: What do I ask the coaches to help them reflect on their experience?*

- What went well?
- What are you challenged by?
- What are some possible solutions?
- What are your goals/next steps?
- Schedule periodic check-ins to support your coaches in integrating this new or revised solution into their regular practice.
- Find out from the coaches how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

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

Diagnosis Scenarios

		
If your diagnosis is that the individual needs to put in more intense effort, choose a <i>motivational</i> intervention, – for example:	If your diagnosis is that the individual is not understanding the focal practice adequately, or thinking about it appropriately, choose a <i>strategic</i> intervention – for example:	If your diagnosis is that the individual lacks execution skill, choose an <i>educational</i> intervention – for example:
○ Encouragement and enthusiasm—you can do it! ○ Helping the individual understand and confront fear, embarrassment, or other emotions that get in the way of the willingness to try harder or persist in the face of setback ○ Incentivizing, rewarding and praising courage ○ Modeling courage and emotional maturity in your own behavior, confessing fear and explaining how you move toward it rather than away ○ Kick in the pants (offered with love) ○ What else?	○ Asking good questions about how the individual is thinking about the key leadership practice – “Why did you choose to do this and not that?” – Based on where you are now what resources could you draw on to take this story/team/strategy to the next level? ○ Offering your assertions about what you are observing and how you think the individual might fruitfully think about the practice differently – “When you stop at that angry point in the story, I think you may be forgetting that your listeners need a reason to hope in order to be called to action.” ○ Offering the opportunity for silent reflection and self-diagnosis – “Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”	○ Model the behavior and invite the coaches to imitate you or work side by side with you to get the “feel” of the activity ○ Break it down into smaller parts and invite the individual to try one at a time ○ Practice, feedback, repeat ○ Offer three or four different practice exercises and observe which ones “take” for that person ○ Repetition, repetition, repetition ○ What else?

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

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

2. Mr. Greene – Organizing Around Pay Inequity

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

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

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

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

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

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

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

6. Mr. Lawson – Addressing Workplace Fairness

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

Coaching Interventions: Scenarios

Imagine you are talking to a lead who has promised in previous meetings that they are going to talk to a couple of people they want to recruit to their organizing team, but it keeps not happening.

As a group identify how the coach diagnosed the problem- head, heart, or hands.

Then identify the interventions they used - Questions, Observations, Stories, Feedback, Suggestions, and Advice.

1. “You’ve mentioned a few times that it’s hard to connect with the person you want to recruit because they are never in their classroom when you drop by. You also said that you feel like they are a bit of a lost cause. Is there another way you could connect?”
2. “It seems like talking to this person is kind of stressful for you. I remember when I first started to do one-on-ones and honestly, I’m an introvert so it was hard. I used to actually write out what I wanted to say ahead of time and that helped me. Do you think there is something you could do to make the situation less stressful?”
3. “It sounds to me like you may not have done organizing one-on-one conversations. Am I right? Ok, so they aren’t like regular conversations. I’m going to go through the basic parts and we can practice....”

Crafting Coaching Questions: Scenario

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

Sarais is a newly elected President in a district in a small city. She and the other newly elected officers decided to run because they wanted a stronger union. Winning higher raises is a widely felt issue, but the officers aren't sure how to get there. Sarah wants to start the campaign right away because she just attended a campaign training. Another officer Paul is worried about low member participation. And another officer Marie thinks that they don't need a campaign and just should deal with it when bargaining comes up. Sarah is feeling frustrated but is determined to figure out a solution.

The union currently has only 30% dues paying members. Many of those members believe the union needs to win salary increases. They aren't aware of the role members can play, or how they can be involved in their union. They think of the union as a third party- someone else doing the work. These members can't imagine what is possible or how the union could campaign for better pay. Just a small group of members goes to the union meetings.

Use this chart to process your thinking as it is a way for you to resist the urge to "announce" your gut reaction and stay aligned with the coaching mindset of curiosity and inquiry.

My Observations	My "Gut Response"	My Curiosity Underneath	A Question I Could Ask	
				
<i>The officers have a goal but aren't sure how to win it.</i>	<i>"They just need to organize."</i>	<i>"What will it take for them to activate their members?"</i>	<i>"What feels most important right now to move towards your goal?"</i>	

Problem Solving: From Good Service to Centering Worker Agency

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

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

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

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

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

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

Writing Your Campaign Story

Campaign Plan Overview Checklist for Coaches

Component of a Campaign Cycle	Evident in Your Work with the Team Lead
Centering Equity (process to ensure this throughout your campaign?)	
Team Formation (set up the team for success with a shared purpose, commitments, roles?)	
Problem (big issue, no clear solution)	
Issue (personal, manageable, specific to the problem needing to be solved with a tangible solution)	
Demand (what do we want in order to solve the issue)	
Target (has the decision making or resources to solve your problem)	
Allies (supporters on this issue)	
Opposition (do not support you on this issue)	
Metrics (inform is you are winning along the way)	



Campaign Planning Coaching Guide

Indicators
Processes
Interventions
Questions



Campaign Plan Overview Checklist for Coaches

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Metrics (inform is you are winning along the way)	

COACHING TO CENTER EQUITY (Iterative Analysis)

As a coach, the questions in this worksheet can direct your support on this part of the campaign cycle.

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.

What does it mean to center equity in your campaign?
How are you planning 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?
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?

Coaching Leadership Team Development

A Team Lead should be able to answer the following questions:

1. Who are the key people on the team and their roles?
2. What is their shared purpose?
3. What are the community agreements that they are committed to?

Three measures of an effective team to help Team Leads understand are:

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

Three conditions that a Team Lead needs to use to define a team:

1. **The team is bounded.** The team lead 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. **The 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. **The 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 for a Team Lead to use in launching an effective team:

1. **The team has 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. **The Team has 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.

Coaching Team Leads through ID AND ISSUE CUTTING

What is the problem(s) we are trying to address?

What is a concrete solution(s) to one part of this problem? This is where we find our issue.

Is the issue.. (See Issue Analysis Tools)

Widely felt and/or deeply felt?

- Winnable?
- Aligned with our values?

Does the issue..

- Build the union and builds leaders?

DEMAND

What is the demand to the target(s)? The demand should name a clear target, call on the target to take a specific action, and demonstrate the harm or impact. There may be a primary target and a secondary target.

Coaching for Assessment of Organizational Capacity and Resources

Examine what resources we have to build and use power. Power is organized people and organized money (and resources).

People

Who are our organized people?

- How many current leaders and active members do we have?
- Who are potential new leaders and active members, and how can we recruit them?
- Who are our allies? How many leaders and active members do they have? What relationship do they have with the target(s)?

Expertise

Key, specialized knowledge that is used to support the change you want to see. Where is it, how do you get it, how do you communicate it, how do you use it?

Durable Resources

Does not go away (meeting space, research)

Exhaustible Resources

One time use, need to be replenished, need a sustainability plan (money, time)

Coaching Through the Primary Power Analysis of the Issue

Issue Background

What is the history and current status of the issue?

What are the competing agendas or positions on the issue?

What are the narratives surrounding the issue?

Who are allies on the issue? Who are opponents on the issue?

System Landscape

What are the decision making processes on this issue?

Who is involved in each step of the decision making process?

Coaching of Targets and the Power Analysis of Targets

Primary Target Name:

- Based on the Primary Power Analysis who is the primary target? Who can give us what we want?
- Be specific. A target has a name, a face and an address.

Primary Target Power Analysis

Position • What is the target's position on the issue? • Why is the target taking this position? • What is the target's history on the issue?	Self-Interest • What does the target care about? • What motivates the target to act? • What are the target's goals?
Relationships • What relationship do we have with the target? • Who influences the target? Do we (or our allies) have a relationship with any of them? • Who are the target's allies and opponents? • To whom is the target accountable? Is the target elected or appointed? • Who are the target's base of support?	Power • What power does the target have and where does their power derive from? • How do they organize people? • How do they organize money and resources?

Secondary Target Name (if there is one) :

- Be specific. A target has a name and a face. A secondary target can MOVE the primary target.

Secondary Target Power Analysis (if applicable)

Position • What is the target's position on the issue? • Why is the target taking this position? • What is the target's history on the issue?	Self-Interest • What does the target care about? • What motivates the target to act? • What are the target's goals?
Relationships • What relationship do we have with the target? • Who influences the target? Do we (or our allies) have a relationship with any of them? • Who are the target's allies and opponents? • To whom is the target accountable? Is the target elected or appointed? • Who are the target's base of support?	Power • What power does the target have and where does their power derive from? • How do they organize people? • How do they organize money and resources?

Coaching the Process of the SPECTRUM OF ALLIES POWER ANALYSIS (WHO CAN WE MOVE?)

1. Active Allies: Your Constituency

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

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

2. Passive Allies: Support

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: Not Yet – With you or Against you

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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Coaching through a COMMUNICATION PLAN – Based on the spectrum of allies analysis, how do you strategically communicate with the people in each of these groups?

Constituency- Your people who care about this issue and may take action to work towards the win		
What is your plan for being in contact with as many of these folks as often as possible? How will you know they care about this issue?		
Support- Individuals and organizations who support the win but may not be a part of the actions	Neutral - Individuals and organizations who are not yet working towards similar wins or against you.	Passive Opposition and Opposition - Individuals and organizations who are against the win you are seeking to achieve
What is your plan for being in contact with these folks? How will you know they support this issue?	What is your plan for being in contact with these folks? How will you know if and when they move towards you or away from you?	What is your plan for being in contact with these folks? How will you know that they oppose this issue?
Individuals and Organizations you identified that you may not know yet if they support, oppose, or compete with you.		
What is your plan for being in contact with these folks?		

Coaching through a Targeted Messaging Strategy

Focusing only on the opposition leads to becoming disheartened or cynical, which means you ignore potential allies and support. Focusing only on how to convince the important power-holder who is against you leads to ignoring all of the potential support you could build that could overpower her opposition.

Focusing only on active allies leads to being an isolated interest-group, which also means you ignore potential allies and support. Always doing events with the same group of individuals or organizations isolates you from creative, powerful community-building that can arise from new alliances and partnerships.

Generalizing about whole groups of people risks misunderstanding the nuances of communities. If you think about "students" as an entire group, you ignore the huge number of different groups & organizations (potential allies!) that exist in a student community.

DO focus on passive allies. These are folks who know or care about what you're up to, but aren't doing anything about it! Give them a chance to participate and build power with you. Good news, in most social change campaigns, it is not necessary to win the **opponent** to your point of view, even if the powerholders are the opponent. It is only necessary to move some or all of the pie wedges one step in your direction. If we shift each wedge one step, we are likely to win, even if the hardliners on the opponent's side don't budge.

Who is the audience for the campaign messaging? What kind of message will reach them? What are their values? Think about 5 sectors you communicate with – Allies, Passive Allies, Neutral, Passive Opponents, Opponents.

Allies
Passive Allies
Neutral
Passive Opponents
Opponents

Coaching Content for Strategy, Theory of Change, Timelines and Tactics

When you structured your leadership team you decided on a shared purpose: your overall mission, your constituency, and the kind of activities you'll undertake. The challenge now is to strategize just HOW you will carry out that purpose.

The first step is to identify the people whom you are organizing, your constituency, and map out the other relevant actors. The second step is to come up with the goal of your organizing effort: what exactly is the problem is you hope to solve, how would the world look different if it were solved, why hasn't that problem been solved, what would it take to solve it, and toward what clear, observable, and motivational goal could members of your constituency focus their work to get started, build their capacity, and develop their leadership? The third step is to figure out how your constituency could turn resources it has into the power it needs to achieve that goal: what tactics could it use, how could they target their efforts, and how would they time their campaign.

Strategy is "turning resources you have into the power you need to get what you want – your goal.

- Strategic Goal (what you want): The goal is a clear, measurable point that allows you to know if you've won or lost, and that meets the challenge your constituency faces.
- Power (what you need): tactics through which you can turn your resources into the capacity you need to achieve your goal.
- Resources (what your constituency has): time, money, skills, relationships, etc.

How Strategy Works

Strategy is Motivated: What's the problem?

We are natural strategists. We conceive purposes, encounter obstacles in achieving those purposes, and we figure out how to overcome those obstacles. But because we are also creatures of habit, we only strategize when we have to: when we have a problem, something goes wrong, something forces a change in our plans. That's when we pay attention, take a look around, and decide we have to do something differently. Just as our emotional understanding inhabits the stories we tell, our cognitive understanding inhabits the strategy we devise.

Strategy is Creative: What can we do about the problem?

Strategy requires developing an understanding of why the problem hasn't been solved, as well as a theory of how to solve it, a theory of change. Moreover because those who resist change often have access to more resources, those who seek change often have to be more resourceful. We have to use this resourcefulness to create the capacity – the power – to get the problem solved. It's not so much about getting "more" resources as it is about using one's resources smartly and creatively.

Strategy is a Verb: How can we adapt as we learn to solve the problem?

The real action in strategy is, as Alinsky put it, in the reaction – by other actors, the opposition, and the challenges and opportunities that emerge along the way. What makes it "strategy" and not "reaction" is the mindfulness we can bring to bear on our choices relative to what we want to achieve, like a potter interacting with the clay on the wheel, as Mintzberg describes it.

Although our goal may remain constant, strategizing requires ongoing adaptation of current action to new information. Something worked better than we expected. Something did not work that we had expected. Things change. Some people oppose us so we have to respond. Launching a campaign only begins the work of strategizing. This is one reason your leadership team should include a full diversity of the skills, access to information and interests needed to achieve your goal. We call this "strategic capacity." So strategy is not a single event, but an ongoing process continuing throughout the life of a project. We plan, we act, we evaluate the results of our action, we plan some more, we act further, evaluate further, etc. We strategize, as we implement, not prior to it.

Strategy is Situated: How can I connect the view in the valley with the view from the mountains?

Strategy unfolds within a specific context, the particularities of which really matter. One of the most challenging aspects of strategizing is that it requires both a mastery of the details of the “arena” in which it is enacted and the ability to go up to the top of the mountain and get a view of the whole. The power of imaginative strategizing can only be realized when rooted within an understanding of the trees AND the forest. One way to create the “arena of action” is by mapping the “actors” that populate that arena.

Key Strategic Questions for Coaches and Team Leads to ask:

1. Who are my PEOPLE?
2. What is the CHANGE they need?
3. How can they turn their RESOURCES into the POWER they need?
4. What is their STRATEGIC GOAL?
5. Which TACTICS can they use?
6. What is their TIMELINE?

Step 1: Who are my people? (Similar to the Spectrum of Allies Analysis)

Constituency

Constituents are people who have a need to organize, who can contribute leadership, can commit resources, and can become a new source of power. It makes a big difference whether we think of people with whom we work as constituents, clients, or customers. Constituents (from the Latin for “stand together”) associate on behalf of common interests, commit resources to acting on those interests, and have a voice in deciding how to act. Clients (from the Latin for “one who leans on another”) have an interest in services others provide, do not contribute resources to a common effort, nor do they have a voice in decisions. Customers (a term derived from trade) have an interest in goods or services that a seller can provide in exchange for resources in which he or she has an interest. The organizers job is to turn a community – people who share common values or interests – into a constituency – people who can act on behalf of those values or interests.

Leadership

Although your constituency is the focus of your work, your goal as an organizer is to draw upon leadership from within that constituency – the people with whom you work to organize everyone else. Their work, like your own, is to “accept responsibility for enabling others to achieve purpose in the face of uncertainty.” They facilitate the work members of their constituency must do to achieve their shared goals, represent their constituency to others, and are accountable to their constituency. Your work with these leaders is to enable them to learn the five organizing practices you are learning: relationship building, storytelling, structuring, strategizing, and action. By developing their leadership you, as an organizer, not only can get to “get to scale.” You are also creating new capacity for action – power – within your constituency. For the purpose of this exercise your group here is your leadership team.

Opposition

In pursuing their interests, constituents may find themselves to be in conflict with interests of other individuals or organizations. An employers’ interest in maximizing profit, for example, may conflict with an employees’ interest in earning a comfortable wage. A tobacco company’s interests may conflict not only with those of anti-smoking groups, but of the public in general. A street gang’s interests may conflict with those of a church youth group. The interests of a Republican Congressional candidate conflict with those of the Democratic candidate in the same district. At times, however, opposition may not be immediately obvious, emerging clearly only in the course of a campaign.

Supporters

People whose interests are not directly or obviously affected may find it to be in their interest to back an organization’s work financially, politically, voluntarily, etc. Although they may not be part of the constituency, they may sit on

governing boards. For example, Church organizations and foundations provided a great deal of support for the civil rights movement.

Competitors and Collaborators

These are individuals or organizations with which we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. Two unions trying to organize the same workforce may compete or collaborate. Two community groups trying to serve the same constituency may compete or collaborate in their fundraising.

Other Actors

These are individuals and actors who may have a great deal of relevance to the problem at hand, but could contribute to solving it, or making it harder to solve, in many different ways. This includes the media, the courts, the general public, for example. Mapping the actors can help us identify those who may be responsible for the problem our constituency faces, where they can find allies, and who else has an interest in the situation.

Step 2: What is the change they need?

We then must decide on the change we want to see by first asking what exactly the problem is, how the world might look if it were solved, why it hasn't been solved, and what it would take to solve it.

What's the problem?

What exactly is the problem, in real terms, in terms of people's every day life?

Brainstorm your teams understanding of what the problem is with as much specificity as possible. Dig into it and go beyond the accepted answers. \

How would the world look different if the problem were solved?

What happens if we fail to act? What is the "nightmare" that awaits – or may already be here? On the other hand, what could the world look like if we do act? What's our realistic "dream", a possibility that could become reality?

Why hasn't the problem been solved?

If the world would look so much better for our people if the problem were solved, why hasn't it been solved? Has no one thought of it? Did people try, but found they were meeting too much resistance? Did people not know how? Did they lack information? Did they lack technology? Would solving the problem threaten interests powerful enough to derail the attempts?

What would it take to solve the problem?

More information? Greater awareness? New tools? Better organization? Better communication? More power? What changes by what people would be required for the problem to be solved?

What is the change they need?

What change could you focus on achieving that would make a real difference in the lives of your constituency. It is more focused than a shared purpose but broader than a strategic goal.

Step 3: How can they turn their resources into the power they need: Theory of Change?

Figuring out how to achieve a strategic goal – or even what goal is worth trying to achieve – requires developing a "theory of change". We all make assumptions about how change happens. Some people think that sharing information widely enough (or "raise awareness") about a problem will change things. Others contend that if we just get all the "stakeholders" into the same room and talk with each other we'll discover that we have more in common than that separates us and that will solve the problem. Still others think we just need to be smarter about figuring out the solution.

Community organizers focus on the community, their constituency, because they believe that unless the community itself develops its own capacity to solve the problem, it won't remain solved. Another word for "capacity" is "power" or, as Dr. King defined it "the ability to achieve purpose." Power grows out of the influence that we can have on each other. If your interest in my resources is greater than my interest in your resources, I get some power over you – so I can use your resources for my purposes. On the other hand, if we have an equal interest in each other's resources we can collaborate to create more power with each other to bring more capacity to bear on achieving our purposes than we can alone. So the question is how to proactively organize our resources to shift the power enough to win the change we want, building our capacity to win more over time? Since power is a kind of relationship, tracking it down requires asking four questions:

1. What do WE want?
2. Who has the RESOURCES to create that change?
3. What do THEY want?
4. What resources do WE have that THEY want or need?

If it turns out that we have the resources we need, but just need to use them more collaboratively, then it's a "power with" dynamic. If it turns out that the resources we need have to come from somewhere else, then it's a "power over" dynamic. So the question is how our constituency can use its resources in ways that will create the capacity it needs to achieve the goal. IF we do this, THEN that will likely happen. **Coaches and Leads will test this out with a series of "If-Then" sentences. Once your satisfied you are ready to articulate your organizing sentence:**

"We are organizing WHO to achieve WHAT (goal) by HOW (theory of change) to achieve what CHANGE"

Step 4: What is their strategic goal?

How might we set a goal that—while it may not solve the whole problem identified in Step Two—could get us well on our way by making a real change, building our capacity, motivating others, and creating a foundation for what comes next? No one campaign can solve everything, but unless we can focus our efforts on a clear outcome, we risk wasting precious resources in ways that won't move us towards our ultimate goal. Here are some criteria to consider for a motivational, strategic organizing campaign goal—one that builds leadership and power:

1. **Specific Focus:** It's concrete, measurable, and meaningful. If your constituents win, achieving this goal will result in visible, significant change in their daily lives. This is the difference between "our goal is to win reproductive justice" and "our goal is to ensure that every student has access to free, round the clock contraception on our campus." We make progress on the first one by turning it into something that can be achieved by moving specific decision makers to reallocate resources in specific ways. Your constituency will need this focus to move into action.
2. **Motivational:** It has the makings of a good story. The goal is rooted in values important to your constituency, requires taking on a real challenge, and stretches your resources: It isn't something you can win tomorrow. Think David and Goliath.
3. **Leverage:** It makes the most of your constituency's strengths, experience and resources, but is outside the strengths, experience and resources of your opponent.
4. **Builds Capacity:** It requires developing leadership who can organize their own constituency to enhance the power of your organization. It offers multiple local targets or points of entry and organization.
5. **Contagious:** it could be emulated by others pursuing similar goals.

Step 5: What tactics can they use?

Remember what a “tactic” is? It’s the activity that makes your strategy real. Strategy without tactics is just a bunch of ideas. Tactics without strategy wastes resources. So the art of organizing is in the dynamic relationship between strategy and tactics, using the strategy to inform the tactics, and learning from the tactics to adapt strategy.

Your campaign will get into trouble if you use a tactic just because you happen to be familiar with it – but haven’t figured out how that tactic can actually help you achieve your goal. Similarly, if you spend all your time strategizing, without investing the time, effort, and skill to learn how to use the tactics you need skillfully, you waste your time. Strategy is a way of hypothesizing: if I do this (tactic), then this (goal) may happen. And like any hypothesis the proof is in the testing of it.

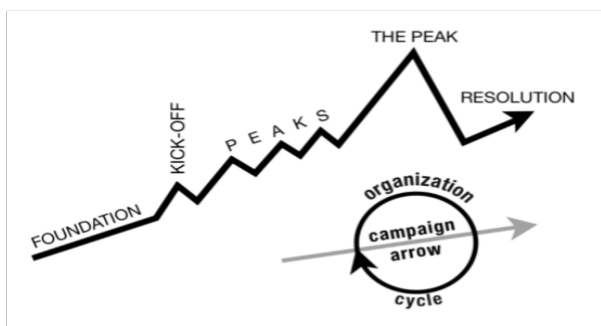
Criteria for good tactics include:

- Strategic: it makes good use of your constituency’s resources to make concrete, measurable progress toward campaign goals. Saul Alinsky and Gene Sharp are excellent sources of tactical ideas.
- Strengthens your organization: it improves the capacity of your people to work together.
- Supports leadership development: It develops new skills, new understanding, and, most importantly, new leadership.

There are two ways to operate in the world—you can be reactive, as many organizations are, or you can be proactive. In order to be proactive you have to set your own campaign goals and timeline, organizing your tactics so that they build capacity and momentum over time.

Step 6: What is their timeline?

The timing of a campaign is structured as an unfolding narrative or story. It begins with a foundation period (prologue), starts crisply with a kick-off (curtain goes up), builds slowly to successive peaks (act one, act two), culminates in a final peak determining the outcome (denouement), and is resolved as we celebrate the outcome (epilogue). Our efforts generate momentum not mysteriously, but as a snowball. As we accomplish each objective we generate new resources that can be applied to achieve the subsequent greater objective. Our motivation grows as each small success persuades us that the subsequent success is achievable – and our commitment grows.



A campaign timeline has clear phases, with a peak at the end of each phase—a threshold moment when we have succeeded in creating a new capacity we can now put to work to achieving our next peak. For example, one phase might be a 2-month fundraising and house meeting campaign that ends in a campaign kickoff meeting or rally. Another phase might be 2 months of door-to-door contact with constituents affected by the problem you’re trying to solve, collecting a target number of petitions to deliver with a march on the Mayor at City Hall at the end, another peak. But within each phase there is a predictable cycle, which in a sense is a mini-campaign in itself: training, launch, action, more action, peak, evaluation. When organizing a peak, keep in mind a specific outcome that you want the peak to generate. For example, if you want to sign-up 50 new volunteers at an event or launch three neighborhood teams, how do you make that happen?

After each peak, your staff, volunteers and members need time to rest, learn, re-train and plan for the next phase. Often organizations say, “We don’t have time for that!” Campaigns that don’t take time to reflect, adjust and re-train end up burning through their human resources and becoming more and more reactionary over time.

Coaching on developing a STRATEGY AND TACTICS

Brainstorm tactics that will put pressure on the target(s).

Name how each tactic would disrupt the target(s)'s self-interest, relationships, or power.

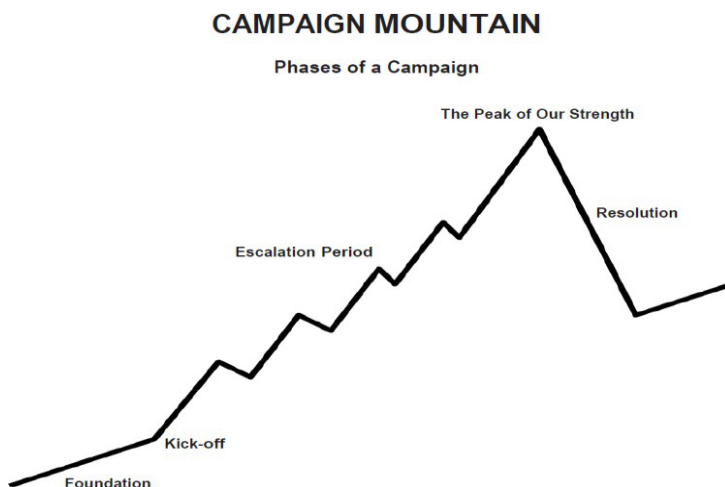
List the tactics above which meet the criteria below:

- Put pressure on the target (push them out of their comfort zone)
- Build our power (develop our leaders and bring more people into the campaign)
- Are strategic (make good use of our resources to put pressure on target)

Number the tactics above in order of escalation:

Think about how much participation, resources, and risk each tactic requires, as well as how much pressure it will put on the target(s).

Keep reviewing this list throughout the campaign. Remember that each implemented tactic gives us more information about the readiness of our members for the next step and how much pressure the target(s) can sustain. Use this information to inform the next tactic.



COMPRESSION POINTS

What are the key dates to plan the campaign around?

This can be either externally set dates (board meetings, breaks, etc) or internally set dates (deadlines we give to the target).

BUILDING POWER & DEVELOPING LEADERS

In what ways will we activate more members and build power throughout this campaign?

In what ways will we develop leaders throughout this campaign?

Coaching on BUILDING POWER & DEVELOPING LEADERS – Do the Math

Goals vs. Metrics

GOALS measure consequential outcomes—the ultimate work that needs to get done to win your campaign. The goal you give a staff person is what you're asking that person **TO ACHIEVE** over a long period of their work.

METRICS track the activities that staff and volunteers engage in day to day. Metrics track what you are asking volunteers **TO DO**. Metrics are not an end in themselves, but a way to help you, your volunteers decide routinely which activities are best helping you meet your overall campaign goals so you can re-strategize over time.

What is your goal? How many people on what date will it take to win that?

Example:

Goal is to get a question placed on the ballot. The metric is 5000 paper petitions signed 4 months from now.

Universe of Potential Actors: 60 Worksites each with 100 Workers

Team Planning: 10 Campaign Team Lead Members create plan (30 Days) (10 People)

Foundation: Each Campaign Team Lead Works with 5 Sites to recruit and train a Campaign Action Lead. (1 Team Lead to 5 Worksite Leads - 50 People)

Structure Building: Those 50 Campaign Action Leads recruit 5 People and train them. (50 Worksite Leads to 5 Building Team Members - 250 People)

Second Peak: Expansion Communication and Kick-off (30 Days)

Each Building team holds one 10 Minute Meeting recruiting 25 people in attendance. (each Campaign Action Team Member is responsible for recruiting 5 people to the meeting) (250 Building Team Members to 5 Supporters - 1250 People)

Third Peak: Resolution - Asking for Signatures (30 Days)

Each of the 25 who attended each of the 50 building meetings are responsible for collecting at least 5 petition signatures. (1250 Supporters to 5 Supporters - 6250 Signatures and People)

What is your math?

Coaching the Development of an Outline for the Campaign Plan

- What foundation do you need to build before implementing your campaign (leadership team, initial planning, recruit leaders, gather resources, etc.)? How many people? Date?
- What will you do to kick-off your campaign and gear up for the first tactic? How many people? Date?
- What tactics will you take to reach the win? How many people? Date?
- Are there any natural compression points (dates, events, deadlines) that tactics should align with?

Foundation		
Kick-off		
Tactic 1		
Tactic 2		
Tactic 3		
Tactic 4		
Tactic 5		
Win/Demand		

Kick-Off	
Kick-Off Goal	
# Leaders	
# Participants	
Date(s)	
Location(s)	
Recruitment and Communication Plan	
Resources and Supplies	
Measurable Data (Qualitative and Quantitative)	

Debrief (Complete after action, Plus, Delta, Key Learning)

Tactic 1 (Complete for each tactic)	
Tactical Goal	
#Leaders	
#Participants	
Date(s)	
Location(s)	
Recruitment and Communication Plan	
Resources and Supplies	
Measurable Data (Qualitative and Quantitative)	

Debrief (Complete after action, Plus, Delta, Key Learning for Next Action)

High Participation Local Self- Assessment

Rating Scale

1	2	3	4
Low Participation	Emerging Participation	Growing Participation	High Participation Local

1. Distribution of Union Work

Who does the work of the union?

1	2	3	4
Officers, staff, and a handful of activists perform nearly all union work.	Some members assist with union work but remain dependent on officers and staff.	Worksite leaders and committees perform significant portions of union work with support and coaching.	Work is broadly distributed across trained worksite leaders and member teams. Officers focus on strategy, coalition work, political leadership, and organizational growth.

2. Worksite Representative Capacity

How capable are worksite leaders?

1	2	3	4
Representatives primarily relay information.	Representatives occasionally assist members with workplace concerns.	Representatives regularly organize members and handle basic worksite issues.	Representatives confidently address Level 1 concerns, organize coworkers, identify leaders, recruit members, and mobilize collective action.

3. Organizing Data

How are data used?

1	2	3	4
Data is mainly administrative.	Data is occasionally reviewed after campaigns.	Data informs some organizing decisions.	Data is routinely analyzed to identify engagement levels, leadership gaps, organizing opportunities, worksite capacity, and strategic resource allocation.

4. Member Engagement

What percentage of members take action?

1	2	3	4
Less than 20% regularly participate.	Participation centers around a small activist core.	Many (50-60%) members participate in campaigns and events when asked.	A supermajority of members (>75%) routinely participate in conversations, surveys, campaigns, meetings, actions, and leadership opportunities.

5. Organizing Conversations

How often are members engaged one-on-one?

1	2	3	4
Member contact occurs primarily during crises or dues collection.	Some organizing conversations occur during campaigns.	Worksite leaders conduct regular outreach.	Organizing conversations are a normal part of union culture, with leaders consistently identifying issues, building relationships, and developing activists.

6. Budget Alignment

What does the budget build?

1	2	3	4
Most spending supports governance, conferences, and routine operations.	Some funds support member engagement activities.	Significant resources support organizing and leadership development.	Budget decisions intentionally increase organizing capacity through leader development, worksite teams, member resources, communication systems, organizing technology, and campaign infrastructure.

7. Worksite Structures

How strong are organizing structures?

1	2	3	4
Few organized worksites.	Some active worksites.	Most worksites have functioning representative structures.	Every worksite has an effective organizing team capable of communications, issue identification, membership growth, advocacy, and campaign mobilization.

8. Internal Communication Systems

How do members learn and act?

1	2	3	4
Communication is one-way and inconsistent.	Information flows through a few activists.	Multiple communication methods exist.	Member-to-member communication networks exist in every worksite, allowing rapid dissemination of information and mobilization around union priorities.

9. Campaign Readiness

Can the local run a winning campaign?

1	2	3	4
Local relies on staff or outside support.	Local occasionally runs issue campaigns.	Local can conduct internal organizing campaigns.	Local consistently builds campaigns around clear goals including supermajority membership, supermajority participation, leadership growth, and collective action.

10. Coalition & Community Power

How connected is the local to broader community movements?

1	2	3	4
No meaningful coalition relationships.	Occasional participation in coalition events.	Active relationships with community partners.	Union regularly organizes alongside community allies, builds public support, increases coalition strength, and advances common-good campaigns.

11. Role of Union Staff

Who owns the work—the staff or the members?

1	2	3	4
Staff are the primary problem-solvers. They handle grievances, communications, organizing, and member issues. Members rely on staff to get things done.	Staff begin involving member leaders and worksite representatives in union work. Training and mentoring occur occasionally.	Staff regularly coach worksite leaders, assist with strategy, and support organizing efforts. Members increasingly handle workplace issues and	Staff function primarily as organizers, trainers, strategists, and capacity-builders. Staff train members to address workplace issues, develop leaders, analyze organizing data, support campaigns,

1	2	3	4
		organizing responsibilities.	and strengthen worksite structures. Staff focus on building systems rather than solving individual problems.

12. Role of Union Leaders

Are leaders doing the work themselves, or developing others to lead?

1	2	3	4
Officers and executive board members perform most union functions, make most decisions, and solve most member problems. Leadership is concentrated in a small group.	Leaders recruit volunteers and encourage participation, but still carry most responsibility for union operations.	Leaders intentionally develop new leaders, delegate responsibilities, and build worksite teams. Leadership is becoming distributed.	Leaders focus on strategic planning, political leadership, coalition building, restorative conflict resolution, campaign development, and leadership recruitment. Their primary responsibility is developing other leaders and building collective power. Leadership exists throughout the organization rather than being concentrated in elected positions.

13. Centering Equity

The degree to which the local intentionally identifies, removes, and addresses barriers to participation, leadership, representation, and power based on race, class, gender, language, disability, job classification, work location, and other experiences that affect members' ability to fully engage in the union. A high-participation local treats equity not as a separate initiative, but as a core organizing strategy.

Who has access to leadership, participation, decision-making, and power in our union, and what barriers are preventing others from fully engaging?

1	2	3	4
Equity is rarely discussed or considered in decision-making. Leadership and participation tend to come from the same	The local expresses support for diversity, equity, and inclusion and occasionally offers trainings or recognizes equity	The local intentionally recruits leaders from underrepresented groups, begins examining participation and leadership data, and adjusts programs, communications, and	Equity is embedded in every aspect of union work. Leadership reflects the diversity of the membership. Participation barriers are regularly assessed and addressed. Organizing

1	2	3	4
social groups. The local assumes everyone has equal access to participation opportunities.	concerns. There is growing awareness of participation gaps, but limited action to address them.	structures to increase access and inclusion. Equity is incorporated into organizing, bargaining, and leadership development.	campaigns, bargaining priorities, communications, leadership recruitment, budget decisions, coalition work, and strategic planning are evaluated through an equity lens. Members most impacted by inequities are actively involved in shaping union priorities and strategies.

Scoring and Interpretation Process of the Self-Assessment

Step 1: Rate Each Category

For each category, assign a score from 1-4 based on the descriptions provided.

Score	Description
1	Low Participation
2	Emerging Participation
3	Growing Participation
4	High Participation

Encourage the leadership team to discuss evidence rather than perceptions when selecting scores:

- What examples support this score?
- What evidence contradicts this score?
- Would worksite leaders and members score us the same way?
- Are there significant differences across worksites?

Step 2: Calculate the Overall Score

Add all category scores and divide by the total number of categories.

Overall Score Interpretation

Average Score	Classification
1.0 – 1.9	Low Participation Local
2.0 – 2.9	Emerging Participation Local
3.0 – 3.5	Growing Participation Local
3.6 – 4.0	High Participation Local



Campaign Lab

High Participation Local Scenarios



Campaign Coaches will use these scenarios to enhance their coaching skills and better support campaign leads.

Scenario: The Higher Education Workers Alliance

The Higher Education Workers Alliance (HEWA) represents approximately 1,100 classified staff employees across three public colleges in a state university system. Members include administrative assistants, facilities staff, maintenance employees, IT professionals, clerical workers, library staff, food service employees, and custodians.

For many years, the union's primary focus was bargaining and grievance representation. Most union activities were directed by the president, vice president, a staff organizer, and a small executive board. Members generally supported the union, but participation was inconsistent. Membership density hovered around 70 percent, and many members only interacted with the union when they experienced a workplace problem or contract dispute.

Five years ago, the state university system began discussing a workforce modernization plan that many members feared would increase outsourcing, reduce job security, and worsen compensation disparities between campuses. During a series of meetings, activists discovered that employees doing similar jobs were paid significantly different wages depending on which campus employed them. Members also learned that advancement opportunities, training access, and classification systems varied greatly across the system.

A small group of activists proposed a statewide campaign focused on compensation equity, professional advancement, and employee retention. Rather than limiting the effort to one campus, they invited neighboring locals and other labor organizations to join the discussion.

The coalition eventually included unions affiliated with several labor organizations. Each participating local agreed to send representatives to a coalition council that met monthly. After two years of relationship-building, the coalition adopted a shared vision focused on compensation reform, fair classification systems, and improved professional development opportunities.

Today, the coalition is widely recognized as one of the strongest labor alliances in the state's higher education system. Coalition leaders regularly share research, bargaining information, and campaign updates. When one local faces a contract fight, members from other locals frequently attend rallies and informational pickets to demonstrate solidarity. Community groups focused on economic justice, workforce development, and public education have also begun supporting the coalition's efforts.

Internally, HEWA has changed significantly.

The local created member-led committees responsible for research, communications, political engagement, data analysis, membership outreach, and coalition coordination. Many of these committees are chaired by rank-and-file members rather than officers. Some committee leaders had never held a union role before volunteering for campaign work.

One long-time maintenance employee who had never attended a union meeting now leads the compensation research committee. An IT specialist manages campaign databases and participation tracking systems. A newer employee leads a membership outreach team that regularly contacts coworkers, gathers feedback, and recruits volunteers.

As part of the campaign, HEWA invested in new organizing practices. Committee leaders track participation rates, meeting attendance, leadership development activities, petition signatures, volunteer engagement, and organizing conversations. Reports are reviewed monthly by officers, staff, and committee leaders. Data is often used when deciding where to invest resources or which departments may need additional leadership development.

However, participation remains uneven across campuses.

The flagship campus regularly turns out large numbers of members for meetings and actions. Participation on one rural campus is far lower. Leaders believe this is partly because many members work second or third jobs and have limited availability. Another campus struggles to engage night-shift custodians and facilities employees who work outside traditional meeting schedules.

To address these challenges, the local has experimented with virtual meetings, multilingual communications, rotating meeting times, and department-based outreach teams. Participation has improved somewhat but leaders continue to debate whether these efforts are sufficient.

Membership density has increased dramatically over the past three years and now exceeds 90 percent. Participation in actions has increased as well. During a recent system-wide petition campaign, approximately 75 percent of members signed petitions supporting compensation reform. More than 300 members attended a statewide virtual town hall, the largest member meeting in local history.

Still, leaders recognize that signing a petition and attending a town hall are not the same as sustained leadership involvement. A relatively small group of activists continue to perform much of the campaign's day-to-day work. Although new leaders have emerged, some committees struggle with burnout and uneven workloads.

The role of staff has also changed.

Historically, staff handled most grievances, communications, member training, and organizing activities. Today, staff spend much of their time coaching committee leaders, facilitating trainings, supporting campaign strategy, and helping members navigate workplace issues. Staff still manage complex grievances and legal matters, but they increasingly encourage members to solve problems collectively rather than relying on staff intervention.

Some members welcome this approach and appreciate developing new skills. Others express frustration, arguing that they pay dues because they expect union staff to handle workplace problems for them.

The local's executive board has also been evolving. Officers no longer run every campaign meeting. Instead, committees are expected to develop plans, make recommendations, and carry out approved work. The executive board focuses more heavily on strategic planning, coalition relationships, political advocacy, and long-term campaign goals.

Yet board members disagree about how quickly leadership should be distributed. Some believe committees should have greater decision-making authority. Others worry that newer leaders may lack the experience necessary to make strategic choices about bargaining and political action.

Finances have become another point of discussion.

Over the past four years, the local has redirected money away from conferences and governance activities and into leadership training, organizing technology, campaign materials, member communications, interpretation services, and coalition-building efforts. Supporters argue the investments are creating long-term organizing capacity. Critics contend the local has cut too deeply into traditional programs and member benefits.

The union has intentionally attempted to diversify leadership. Recent committee recruitment efforts focused on younger workers, employees of color, women in maintenance trades, multilingual members, and employees from smaller campuses.

Progress has been made. Several committees are more representative than they were five years ago, and leadership opportunities are more accessible. However, coalition leaders recently reviewed participation data and discovered that employees from the smallest campus rarely hold leadership positions. Members whose first language is not English participate at lower rates than other groups despite translated communications.

The coalition's flagship campaign is entering a critical phase. Legislative allies have expressed interest in pursuing statewide compensation reform, and university leaders have

agreed to participate in discussions about classification systems and advancement structures.

The union must now decide whether its current structures are strong enough to support a multi-year statewide campaign requiring large-scale member engagement, worksite leadership, coalition coordination, organizing conversations, data analysis, and political mobilization.

Some members believe HEWA has already become a high-participation local. Others argue it is still transitioning from a service model and has significant work to do before leadership, participation, and power are truly distributed across the organization.

Discussion Questions

1. Using the High Participation Local Assessment Tool, score HEWA on all 13 dimensions.
2. Which categories are clearly strengths and which categories are debatable?
3. Where do you see evidence of distributed leadership? Where is leadership still concentrated?
4. How effectively is HEWA using organizing data to build power?
5. What evidence suggests the staff role is changing?
6. How strong are the coalition and community relationships?
7. What participation barriers remain unresolved?
8. Does membership density translate into meaningful member engagement?
9. How would you score the local on centering equity? Why?

Scenario: Building a Union Beyond Bargaining

The Capital Community College Educators Association (CCCEA) represents approximately 900 faculty, professional staff, and adjunct instructors across a large community college system. For many years, the union was viewed primarily as an organization that bargained contracts, handled grievances, and provided representation when members encountered workplace problems.

Most members believed in the union and appreciated contract protections, but participation was limited. General membership meetings often drew fewer than 20 people. Members frequently contacted union leaders when they needed assistance but rarely volunteered for union activities. Over time, much of the union's knowledge, relationships, and decision-making became concentrated in a handful of officers and long-serving activists. Leaders began worrying about what would happen when these individuals retired or stepped down.

Three years ago, several emerging leaders began discussing the long-term sustainability of the local. They believed the organization needed to become more than a bargaining and grievance machine. The union wanted members to see themselves as owners of the organization, not simply consumers of services.

The leadership team began by asking members what they wanted from their union. They conducted surveys, virtual listening sessions, in-person meetings, and informal conversations across departments. Members consistently reported wanting stronger communication, more transparency, better opportunities to connect with colleagues, and greater involvement in shaping the future of the union.

Based on that feedback, the union launched several new committees focused on communications, organizing, member engagement, and professional issues. Union leaders assumed members would eagerly participate.

They were wrong.

While members expressed interest, few actually joined the committees. Meetings were initially well attended, but participation steadily declined. Several committees eventually stopped meeting altogether. Leaders became frustrated because members regularly requested improved communication and engagement opportunities but rarely volunteered to help create them.

Rather than abandoning the effort, union leaders reflected on what they were learning. They concluded that simply creating committees was not enough. Members did not

become involved because a volunteer opportunity existed. People became involved because someone they trusted personally invited them to participate.

The local shifted toward a relationship-based organizing model.

Officers and activists began conducting one-on-one conversations with members. They identified respected coworkers, listened to workplace concerns, and made personal leadership asks rather than broad requests for volunteers. Leaders spent time asking members about their goals, challenges, and interests. Instead of saying, "We need volunteers," they began asking specific individuals to take on specific responsibilities.

This approach led to one of the union's most significant accomplishments: rebuilding its steward program.

For years, stewards had virtually disappeared from the organization. Members had no clear workplace contacts beyond officers and staff. Leaders worried that every grievance, question, and organizing challenge eventually landed on the same few people.

After months of direct outreach, the local recruited eight new stewards from different areas of the college. The union developed a steward training program covering contract knowledge, organizing conversations, grievance support, leadership development, and member outreach. Several participants had never held union positions before. The union hopes stewards will eventually provide office hours, support coworkers, identify workplace leaders, and help build organizing capacity throughout the institution.

At the same time, the local invested significant energy in communications.

A monthly newsletter evolved from a short two-page publication into a much larger communication tool featuring union updates, labor history, contract education, coalition news, and member stories. Members gradually began contributing articles and content. The local also started developing a yearly communications calendar and planning events further in advance than ever before.

The union also experimented with community-building events that had little to do with bargaining. Labor history programs, social gatherings, networking opportunities, and family-friendly activities became part of the union's strategy. Leaders believed stronger relationships between members would lead to stronger organizing over time. Attendance at these events varied significantly. Some were successful while others attracted only small groups of participants.

Despite progress, challenges remain.

The local's membership is highly fragmented. Nearly 85% of members are adjunct or part-time employees. Many work at multiple institutions, juggle family responsibilities, or hold second jobs. Even leaders who support the union acknowledge that many members have limited time and energy to participate in additional activities. This reality continues to limit participation in committees, campaigns, and events.

The union has also struggled to identify all potential leaders. For years, membership records were incomplete, and leaders often lacked a clear understanding of who their members were and where opportunities for engagement existed. The local has made progress collecting information, but leaders acknowledge that they still do not have a complete picture of workplace networks and informal leadership structures.

Relationships with other unions on campus are improving. The local regularly collaborates with faculty, professional staff, and facilities unions on communications and events. Leaders increasingly believe that many workplace issues require coalition-based solutions rather than single-union approaches. However, collaboration still depends heavily on a small group of committed activists who maintain those relationships.

The role of leadership is also changing. Officers are working intentionally to develop new leaders, distribute responsibilities, and create pathways for involvement. New positions have been added to support communications and membership engagement. Several newer members have stepped into leadership roles, including stewards, event organizers, and communications contributors. Yet major decisions still tend to flow through a relatively small leadership team.

The role of staff is less clear. Staff continue to handle many traditional union responsibilities, but officers increasingly want members and stewards to take ownership of organizing, communications, workplace support, and relationship building. The transition is underway, but not yet complete.

In recent months, the union has begun discussing a mutual aid program to help members facing financial hardship. Leaders have also identified the college Board of Trustees as an important audience and hope to encourage members to share stories about their work and impact on students. These efforts are intended to strengthen both internal solidarity and external relationships.

As the new academic year begins, union leaders believe they have made significant progress toward creating a more participatory organization. They point to the steward program, improved communications, new leadership pathways, and stronger relationships among members.

Others argue that participation remains concentrated in a relatively small group, that organizing systems are still developing, and that the culture of member ownership is far from fully established.

The executive board has decided to use the High Participation Assessment Tool to evaluate where the local currently stands and identify priorities for the next phase of growth.

Discussion Questions

1. Score the local on each of the 13 dimensions of the High Participation Assessment Tool.
2. Which categories are strongest? What evidence supports those ratings?
3. Which categories are weakest? Why?
4. Is leadership truly distributed, or is the local still dependent on a core group of activists?
5. How effective are the steward structures in building participation and power?
6. What role do organizing conversations play in this scenario?
7. How should the local improve its use of data and worksite mapping?
8. How would you score coalition and community power?
9. What barriers to participation still exist for adjunct and part-time members?

Scenario: Building Visibility, Trust, and Collective Action in Challenging Times

The Lakeshore Education Association (LEA) represents approximately 1,800 educators and education support professionals across a suburban school district. Historically, the union has been strongest when organizing around contract negotiations, salary concerns, and workload issues. Participation in bargaining-related campaigns is typically high, but member engagement outside bargaining cycles has been inconsistent.

In recent years, district leaders, educators, and families have struggled with growing concerns about student mental health, belonging, safety, and school climate. While many educators believe schools should intentionally create supportive environments for all students, the community has become increasingly polarized around issues of identity, inclusion, and student support services.

Several educators have experienced criticism on social media for comments perceived as political. School board meetings that once focused primarily on budgets and curriculum now frequently include heated public debate. Many staff members report feeling uncertain about what topics are safe to discuss publicly and worry that their professional reputation could be damaged by a single social media post or community complaint.

Against this backdrop, a small group of union activists began discussing how the local might help educators support students while navigating an increasingly divided community.

The effort started after several educators attended trainings focused on student wellness, mental health, and creating supportive school environments. Participants returned energized and began talking with colleagues about ways the union could encourage educators to be more visible sources of support for students who might be struggling.

Initially, the effort was led by only a handful of members. Most conversations occurred informally between trusted coworkers. Several activists designed materials promoting messages of belonging and student support and distributed them to interested educators. They were uncertain how staff members would respond.

To their surprise, educators from multiple schools expressed interest. Several teachers requested posters and classroom signs that communicated support for students. A few support professionals asked whether they could participate as well. Even some administrators quietly expressed appreciation for the effort and indicated they would support conversations about student wellness.

However, support was far from universal.

Many educators privately agreed with the goals but were reluctant to participate publicly. Some feared criticism from parents. Others worried that community members might misinterpret their intentions. Several members stated they agreed with the values behind the effort but did not want their names attached to anything visible.

As a result, a small number of activists continued doing most of the organizing work.

The union's executive board encouraged members to share stories about student needs and school climate concerns. Listening sessions were held both virtually and in person. Attendance varied. In some schools, meaningful conversations emerged about student mental health, suicide prevention, social isolation, and trusted adult relationships. In others, participation was minimal.

Through these conversations, the union identified a growing number of educators interested in serving as workplace contacts around student support issues. The union created a network of volunteers willing to connect colleagues with resources, share information about available programs, and help identify concerns emerging in their schools.

Some of these volunteers became highly active. They organized conversations among coworkers, encouraged participation in trainings, and helped distribute information. Others were supportive but remained largely passive, preferring to assist only when asked directly.

The union leadership team began discussing whether this informal network should become a more structured organizing effort.

To support the work, LEA developed partnerships with several community organizations focused on student wellness, youth mental health, family support services, and educational equity. These organizations provided resources, training opportunities, and advice on how to communicate effectively in a polarized environment.

The coalition relationships strengthened the campaign, but most members were only vaguely aware that they existed.

Internally, the union's communication systems expanded significantly. The local created a monthly newsletter, increased social media communication, and began highlighting stories from educators across the district. Open rates improved steadily, and members reported feeling more informed about union activities than they had in previous years.

At the same time, leadership recognized a major weakness.

The local had very little organizing data. Leaders knew who attended meetings and trainings, but they lacked detailed information about which worksites had strong participation, where informal leaders existed, or which members had been contacted through organizing conversations. Decisions were still largely based on anecdotal information rather than systematic analysis.

The budget reflected mixed priorities. The union continued investing significant resources in conferences, governance activities, and traditional operations. However, new funding was also being directed toward communications, training opportunities, coalition work, and member engagement activities. Some board members argued for greater investment in organizing infrastructure, while others wanted to maintain long-standing spending patterns.

The role of staff was also evolving.

Historically, members relied heavily on staff to solve problems and guide campaigns. In this emerging effort, staff encouraged members to take ownership of conversations, relationship-building, and outreach. Staff frequently coached activists and helped connect them with resources, but members still looked to staff for direction on many decisions.

Questions of equity surfaced throughout the campaign.

Leaders observed that participation was strongest among veteran educators and weakest among newer educators, education support professionals, and staff from several buildings serving lower-income communities. While the union frequently discussed inclusion and access, it had not yet systematically examined who participated, who held leadership positions, and what barriers might prevent broader engagement.

As the school year progressed, more educators became visible supporters of the effort. Several schools displayed supportive signage. More members attended trainings than ever before. New relationships were forming across buildings.

Yet many activists felt the campaign remained fragile.

Participation was growing, but a relatively small group continued to drive most activities. Coalition partners were engaged, but member understanding of those partnerships remained limited. Communication had improved dramatically, but organizing structures were uneven. Leaders were uncertain whether they had built a sustainable movement or simply a successful project driven by a few passionate individuals.

At the next leadership retreat, members are asked to use the High Participation Assessment Tool to assess the local's current capacity and determine what would be required to build a truly high-participation organization. The discussion is

expected to focus not only on what the local has accomplished, but also on the gaps that remain in leadership development, organizing structures, member engagement, worksite capacity, data use, equity, coalition power, and distributed ownership of the work.

Discussion Questions

1. How would you score the local on each of the 13 dimensions in the assessment tool?
2. Which categories are strongest? What evidence supports those ratings?
3. Which categories appear to be transitioning from a 2 to a 3?
4. Where is union work still concentrated among a small group of activists?
5. How effective are the local's communication systems compared to its organizing systems?
6. What additional worksite structures would need to be developed?
7. How well is the local using coalition partnerships and community power?
8. What organizing data is missing?
9. How effectively is the local centering equity and participation across different groups of members?

Scenario: Vision to Action? Assessing the River City Educators Association

The River City Educators Association (RCEA) represents approximately 5,500 educators in one of the largest school districts in the state. The local has a long history of successful bargaining, political advocacy, and member mobilization during contract fights. Membership density is high, and many educators identify strongly with the union.

However, following several years of rapid change in public education, the executive board began questioning whether the union's priorities still reflected the current needs of educators, students, and communities.

Many leaders noted that the local often reacted to crises instead of leading with a proactive vision. Meetings regularly focused on responding to district decisions, legislative attacks, staffing shortages, budget issues, or school board controversies. While members generally agreed about what they opposed, there was less clarity about what they were collectively trying to build.

Two years ago, the union launched a district-wide initiative called *"The Schools Our Students Deserve."* The goal was not to win a specific contract demand or legislative fight. Instead, the campaign aimed to create a shared vision that could guide organizing, bargaining, political action, coalition work, communications, and member engagement for years to come.

The leadership team created a steering committee composed of officers, building representatives, rank-and-file members, and several emerging leaders who had never previously held formal union positions. The committee organized listening sessions across the district and invited participation from educators, education support professionals, parents, community organizations, and leaders from other school employee unions.

Some members immediately embraced the process.

Others were skeptical.

During building visits, leaders heard questions such as:

"Why are we spending time on this when we have bargaining coming up?"

"Why are we inviting people outside the union into our conversations?"

"Shouldn't we be focusing on member issues instead of community issues?"

Several veteran activists worried that community voices might dilute member priorities. Newer members, however, often welcomed the opportunity to connect union concerns with broader issues affecting students and families.

Over eight months, the committee gathered hundreds of comments from forums, surveys, listening sessions, and stakeholder meetings. Participants were asked two central questions:

- What should excellent teaching and learning look like in our district?
- What should excellent working conditions look like for educators and school employees?

The steering committee reviewed the responses, identified common themes, and developed a new ten-point vision that described the schools, workplaces, and community partnerships members hoped to build. The vision was ultimately adopted by the executive board and celebrated as one of the most significant organizing projects the union had undertaken in years.

Since then, the vision has become part of many union activities.

Building representatives receive training on how to communicate the vision to members. Officers reference it during school board meetings. Bargaining teams use it when explaining proposals. Legislative activists incorporate it into discussions with elected officials. Communication materials often connect current union priorities to the larger vision.

Yet implementation has been uneven.

In some schools, building representatives regularly discuss the vision with members and connect workplace issues to long-term organizing goals. Members in these schools report feeling more informed about the union's purpose and priorities.

In other schools, members have only a vague understanding of the initiative. Some educators know the slogan but cannot explain the ten goals. Several building representatives admit they rarely use the framework because they feel overwhelmed by day-to-day member concerns.

The local's communications committee has invested heavily in promoting the vision. Newsletters, social media posts, board reports, workshops, candidate screenings, and advocacy campaigns increasingly use common language connected to the ten goals. Communication staff believe the union has never had a clearer message.

At the same time, some activists question whether improved messaging has translated into deeper organizing.

Participation in rallies and bargaining actions remains similar to previous years. The local can mobilize members when major issues arise, but involvement in ongoing organizing structures remains concentrated among a relatively small core of activists.

The executive board recently reviewed participation data and found substantial differences across worksites. Some schools consistently have strong representative systems, high meeting attendance, and active organizing teams. Other schools rely almost entirely on one building representative who acts as the sole communication channel between the union and members.

The role of coalition partners has expanded considerably. Community organizations, parent groups, civil rights organizations, and other labor unions contributed ideas during the visioning process and continue to collaborate with the union around public education issues. Many coalition partners feel a stronger sense of ownership and alignment with the union than ever before.

Still, member opinions are mixed.

Some members believe coalition work has strengthened the union's public credibility and community support.

Others argue that leaders spend too much time building external relationships and not enough time recruiting workplace leaders and strengthening internal organizing structures.

The local's finances reflect these competing priorities. Over the past two years, the union has increased spending on communications, community engagement, coalition work, leadership development, and advocacy campaigns. Traditional governance activities continue to receive substantial funding as well. Some leaders argue the budget should shift even more aggressively toward organizing infrastructure and worksite leader development.

The role of leaders is evolving.

Several executive board members have intentionally delegated responsibilities and recruited new activists into meaningful roles. New members have joined committees, facilitated listening sessions, participated in political advocacy, and taken leadership in communications projects.

One widely respected member who rarely seeks elected office emerged as a key architect of the visioning process. His skill in synthesizing ideas, building consensus, and drafting

language earned widespread admiration throughout the campaign and demonstrated that leadership can take many forms.

However, major strategic decisions still tend to flow through a relatively small group of officers and executive board members.

The staff role is similarly mixed. Staff support communications, bargaining, coalition relationships, leadership development, and campaign coordination. While staff increasingly encourage member leadership, many members still look to staff and officers to provide direction before taking action.

The union recently created a new Organizing and Advocacy Committee with the goal of expanding member engagement, supporting future campaigns, and strengthening connections between the vision and the everyday work of the union. Committee members are enthusiastic, but the group has not yet fully defined its responsibilities or long-term goals.

As the local enters a new round of school board elections, legislative advocacy, and salary negotiations, leaders are asking a difficult question:

Has the union truly become a high-participation organization, or has it simply developed a stronger message and vision while still depending on a relatively small group of people to carry most of the work?

The executive board has asked participants to use the High Participation Assessment Tool to assess the current state of the organization and identify what additional changes are needed to build a high-participation local.

Discussion Questions

1. How would you score the local on each of the 13 dimensions of the High Participation Assessment Tool?
2. Is the union's work broadly distributed, or does a small group still carry most responsibilities?
3. How effectively are building representatives using the shared vision to organize members?
4. Does the existence of a strong communications strategy indicate strong organizing?
5. How should participants score coalition and community power? Why?
6. What evidence exists that leadership is becoming more distributed?

7. What evidence suggests major decisions remain concentrated?
8. Is the Organizing and Advocacy Committee likely to strengthen participation? What additional structures would it need?
9. How effectively is the local using organizing data to guide its strategy?

Scenario: River Valley Education Association at a Crossroads

The River Valley Education Association (RVEA) represents approximately 4,200 education employees across a large suburban and rural school district. The membership includes teachers, paraeducators, transportation staff, food service workers, clerical employees, custodians, and substitutes. For years, RVEA relied heavily on a small group of officers and staff representatives to handle grievances, negotiations, communications, and member issues. Members generally viewed the union as a service organization. If someone had a problem, they called the union office. If there was a contract violation, a staff representative handled it. If there was an election or bargaining survey, members participated, but few viewed themselves as responsible for building the union.

Three years ago, district leaders began proposing significant budget cuts, citing declining enrollment and financial challenges. Members were frustrated by increased workloads, staffing shortages, and growing inequities between schools. Some worksites had strong union leaders and high member participation, while other worksites rarely held union meetings and struggled to communicate with members.

In response, RVEA's executive board launched a strategic effort to build a more organizing-focused union. The local divided the district into organizing regions and assigned officers and staff to conduct worksite assessments. They identified worksites with active representatives, worksites with informal leaders who were not serving in official roles, and worksites with little union structure at all.

Today, every worksite has at least one identified representative or point person. About 70% of worksites have functioning organizing teams with multiple member leaders. Several larger schools have developed building committees that include representatives from different departments and job classifications. However, the remaining worksites still rely heavily on one individual to communicate information and mobilize members.

The local recently expanded its bargaining team from 18 members to nearly 75 members. Bargaining team members are expected to bring information back to their worksites, hold update meetings, and report workplace concerns. The bargaining team includes representatives from different job classifications, including paraeducators and custodians who previously had little involvement in bargaining conversations.

To support organizing efforts, RVEA purchased organizing software that allows leaders to track member conversations, survey participation, structure tests, and worksite engagement levels. Some building leaders use the system regularly to identify participation gaps, map their worksites, and recruit new activists. Others rarely log in and continue to rely on personal relationships and informal communication.

The union has begun conducting regular organizing conversations. At some worksites, leaders systematically check in with coworkers, discuss workplace issues, identify concerns, recruit volunteers, and ask members to take action. At other worksites, communication still happens primarily during bargaining updates or when problems arise.

Last spring, the local conducted a district-wide petition campaign around staffing shortages. Participation reached nearly 80% overall, but there were major differences between worksites. Some schools achieved near-universal participation while others struggled to reach half of their members. Leaders used these results to identify where additional support and leadership development were needed.

The executive board has also shifted some budget priorities. Over the past two years, funding for conferences and travel has decreased while spending on organizing technology, member communications, leadership development, release time for site leaders, and campaign materials has increased. Some longtime activists support the changes, while others believe the local is neglecting professional development and state-level networking opportunities.

The role of staff has changed significantly. Staff representatives still handle advanced grievances and legal matters, but they increasingly coach worksite leaders to address Level 1 concerns themselves. Staff spend a growing amount of time training members, supporting organizing campaigns, analyzing participation data, and helping leaders develop strategic plans.

Not everyone is comfortable with this shift. Some members continue to expect staff to immediately solve workplace problems. Some worksite leaders feel anxious about handling difficult conversations with principals or coworkers. A few executive board members worry that leadership responsibilities are being pushed onto members too quickly.

At the same time, many emerging leaders report feeling more ownership over the union than ever before. Several paraeducators, early-career educators, and members from historically underrepresented groups have joined worksite teams and taken on leadership roles. The local has intentionally recruited leaders from job classifications and communities that were previously absent from decision-making spaces.

Despite these efforts, participation is not yet evenly distributed. Worksites serving large numbers of immigrant families have reported that language barriers sometimes limit engagement. Night-shift custodians rarely attend union meetings held after school. Some rural worksites have difficulty sending representatives to district-wide trainings because of

travel time. Although the union recognizes these barriers, members disagree about whether the local has done enough to address them.

The local is preparing for a major contract campaign next year. Leaders hope to build a supermajority structure capable of running coordinated actions at every worksite. They believe they have made substantial progress over the past three years, but they also acknowledge that participation, leadership development, communication systems, and equity practices remain uneven across the organization.

At the next leadership retreat, participants are asked to use the High Participation Local Assessment Tool to evaluate the current state of RVEA. Some leaders believe the local has become a high-participation organization. Others argue that significant elements of the old service model remain.

Discussion Questions for Participants

1. What score (1-4) would you assign in each of the 13 categories?
2. Which categories appear strongest? Why?
3. Which categories appear weakest? Why?
4. What evidence from the scenario supports your ratings?
5. Where do you see characteristics of both a service-model local and a high-participation local?
6. What would need to happen over the next year for RVEA to score a "4" in every category?
7. How effectively is the local centering equity in its organizing, leadership development, and participation structures?
8. What coaching recommendations would you give to RVEA's officers, staff, and worksite leaders?

High Participation Local Self- Assessment

Rating Scale

1	2	3	4
Low Participation	Emerging Participation	Growing Participation	High Participation Local

1. Distribution of Union Work

Who does the work of the union?

1	2	3	4
Officers, staff, and a handful of activists perform nearly all union work.	Some members assist with union work but remain dependent on officers and staff.	Worksite leaders and committees perform significant portions of union work with support and coaching.	Work is broadly distributed across trained worksite leaders and member teams. Officers focus on strategy, coalition work, political leadership, and organizational growth.

2. Worksite Representative Capacity

How capable are worksite leaders?

1	2	3	4
Representatives primarily relay information.	Representatives occasionally assist members with workplace concerns.	Representatives regularly organize members and handle basic worksite issues.	Representatives confidently address Level 1 concerns, organize coworkers, identify leaders, recruit members, and mobilize collective action.

3. Organizing Data

How are data used?

1	2	3	4
Data is mainly administrative.	Data is occasionally reviewed after campaigns.	Data informs some organizing decisions.	Data is routinely analyzed to identify engagement levels, leadership gaps, organizing opportunities, worksite capacity, and strategic resource allocation.

4. Member Engagement

What percentage of members take action?

1	2	3	4
Less than 20% regularly participate.	Participation centers around a small activist core.	Many (50-60%) members participate in campaigns and events when asked.	A supermajority of members (>75%) routinely participate in conversations, surveys, campaigns, meetings, actions, and leadership opportunities.

5. Organizing Conversations

How often are members engaged one-on-one?

1	2	3	4
Member contact occurs primarily during crises or dues collection.	Some organizing conversations occur during campaigns.	Worksite leaders conduct regular outreach.	Organizing conversations are a normal part of union culture, with leaders consistently identifying issues, building relationships, and developing activists.

6. Budget Alignment

What does the budget build?

1	2	3	4
Most spending supports governance,	Some funds support member	Significant resources support organizing and	Budget decisions intentionally increase organizing capacity through leader development,

1	2	3	4
conferences, and routine operations.	engagement activities.	leadership development.	worksite teams, member resources, communication systems, organizing technology, and campaign infrastructure.

7. Worksite Structures

How strong are organizing structures?

1	2	3	4
Few organized worksites.	Some active worksites.	Most worksites have functioning representative structures.	Every worksite has an effective organizing team capable of communications, issue identification, membership growth, advocacy, and campaign mobilization.

8. Internal Communication Systems

How do members learn and act?

1	2	3	4
Communication is one-way and inconsistent.	Information flows through a few activists.	Multiple communication methods exist.	Member-to-member communication networks exist in every worksite, allowing rapid dissemination of information and mobilization around union priorities.

9. Campaign Readiness

Can the local run a winning campaign?

1	2	3	4
Local relies on staff or outside support.	Local occasionally runs issue campaigns.	Local can conduct internal organizing campaigns.	Local consistently builds campaigns around clear goals including supermajority membership, supermajority participation, leadership growth, and collective action.

10. Coalition & Community Power

How connected is the local to broader community movements?

1	2	3	4
No meaningful coalition relationships.	Occasional participation in coalition events.	Active relationships with community partners.	Union regularly organizes alongside community allies, builds public support, increases coalition strength, and advances common-good campaigns.

11. Role of Union Staff

Who owns the work—the staff or the members?

1	2	3	4
Staff are the primary problem-solvers. They handle grievances, communications, organizing, and member issues. Members rely on staff to get things done.	Staff begin involving member leaders and worksite representatives in union work. Training and mentoring occur occasionally.	Staff regularly coach worksite leaders, assist with strategy, and support organizing efforts. Members increasingly handle workplace issues and organizing responsibilities.	Staff function primarily as organizers, trainers, strategists, and capacity-builders. Staff train members to address workplace issues, develop leaders, analyze organizing data, support campaigns, and strengthen worksite structures. Staff focus on building systems rather than solving individual problems.

12. Role of Union Leaders

Are leaders doing the work themselves, or developing others to lead?

1	2	3	4
Officers and executive board members perform most union	Leaders recruit volunteers and encourage participation, but	Leaders intentionally develop new leaders, delegate responsibilities, and	Leaders focus on strategic planning, political leadership, coalition building, restorative conflict resolution, campaign

1	2	3	4
functions, make most decisions, and solve most member problems. Leadership is concentrated in a small group.	still carry most responsibility for union operations.	build worksite teams. Leadership is becoming distributed.	development, and leadership recruitment. Their primary responsibility is developing other leaders and building collective power. Leadership exists throughout the organization rather than being concentrated in elected positions.

13. Centering Equity

The degree to which the local intentionally identifies, removes, and addresses barriers to participation, leadership, representation, and power based on race, class, gender, language, disability, job classification, work location, and other experiences that affect members' ability to fully engage in the union. A high-participation local treats equity not as a separate initiative, but as a core organizing strategy.

Who has access to leadership, participation, decision-making, and power in our union, and what barriers are preventing others from fully engaging?

1	2	3	4
Equity is rarely discussed or considered in decision-making. Leadership and participation tend to come from the same social groups. The local assumes everyone has equal access to participation opportunities.	The local expresses support for diversity, equity, and inclusion and occasionally offers trainings or recognizes equity concerns. There is growing awareness of participation gaps, but limited action to address them.	The local intentionally recruits leaders from underrepresented groups, begins examining participation and leadership data, and adjusts programs, communications, and structures to increase access and inclusion. Equity is incorporated into organizing, bargaining, and leadership development.	Equity is embedded in every aspect of union work. Leadership reflects the diversity of the membership. Participation barriers are regularly assessed and addressed. Organizing campaigns, bargaining priorities, communications, leadership recruitment, budget decisions, coalition work, and strategic planning are evaluated through an equity lens. Members most impacted by inequities are actively

1	2	3	4
			involved in shaping union priorities and strategies.

Scoring and Interpretation Process of the Self-Assessment

Step 1: Rate Each Category

For each category, assign a score from 1-4 based on the descriptions provided.

Score	Description
1	Low Participation
2	Emerging Participation
3	Growing Participation
4	High Participation

Campaign Coach Competencies

We believe the most effective coaches don't just switch between styles, we also strike a balance between several qualities that support our coachees to get the most out of this as a learning relationship.

	Ineffective	Effective ("The Sweet Spot")	Ineffective
Elicitive	Only offering advice	Leaning largely on asking questions, and sometimes providing suggestions	Only asking questions
Directive	"I set the agenda"	Staying flexible in providing guidance on how to focus your time together, collaborating to set and change agendas	"I only respond to what comes up naturally"
Transparency	Always leading with my observations & opinions	Providing enough detail about your assessments so coachees have a sense of "what I'm thinking"	Never sharing my observations & opinions
Experience	"I'm the expert"	Offering stories about your experiences when appropriate, and what you've learned from them	"I know nothing"
Vulnerability	Always staying surface level	Balancing handling challenges identified by coachees with curiosity about "what else might be going on"	Always inviting coachees to reflect on deeper patterns
Taskiness	Meetings are "all business"	Balancing authentically connecting with coachees with the need to "get to work"	Meetings are "all small talk"

We encourage coaches to use this list to do an inventory, asking questions like:

- How much am I using open-ended questions and modeling curiosity in our coach time?
- How much "scaffolding" am I providing to coachees for our sessions in the form of an agenda or other structure, based on my assessment of their campaign's current status?
- How transparent am I being about "my take" on their work – do they think they have to 'read my mind'?
- How am I balancing providing insight into my experiences of campaigning while discovering the answers to their current challenges alongside them?
- How often do I invite coachees to "drop below the surface", and also reveal some of "what I'm wrestling with" as a person or a campaigner?
- How am I balancing building trust and inviting "small talk" or personal connection with "staying on task"?

Campaign Coach Self-Assessment

Purpose

This self-assessment is designed to help Campaign Coaches reflect on their coaching practice, identify strengths, and create professional development goals aligned with the NEA Campaign Lab coaching model.



Rating Scale

- 1 = Needs Significant Improvement
- 2 = Developing
- 3 = Effective
- 4 = Highly Effective
- 5 = Exemplary

Part 1: Understanding of the Campaign Coach Role

Competency	1	2	3	4	5
I understand that my role is to be a thought partner, not the primary decision-maker.	☐	☐	☐	☐	☐
I focus on helping campaign leads discover their own solutions.	☐	☐	☐	☐	☐
I maintain appropriate coaching boundaries and avoid taking ownership of campaign work.	☐	☐	☐	☐	☐
I balance accountability with support and encouragement.	☐	☐	☐	☐	☐
I remain campaign-lead-centered rather than coach-centered.	☐	☐	☐	☐	☐

Comments/Examples:

Part 2: Coaching Skills

Active Listening

Statement	1	2	3	4	5
I listen carefully before offering suggestions.	☐	☐	☐	☐	☐
I identify underlying issues rather than only surface-level problems.	☐	☐	☐	☐	☐
I demonstrate curiosity when challenges arise.	☐	☐	☐	☐	☐
I reflect back what I hear to check understanding.	☐	☐	☐	☐	☐

Questioning Skills

Statement	1	2	3	4	5
I use open-ended questions effectively.	☐	☐	☐	☐	☐
My questions help leads deepen their analysis.	☐	☐	☐	☐	☐
I help leads prioritize challenges and opportunities.	☐	☐	☐	☐	☐
I rely more on questions than advice.	☐	☐	☐	☐	☐

Comments/Examples:

Part 3: Diagnosis and Intervention

Statement	1	2	3	4	5
I can distinguish between motivational, strategic, and skills-based challenges.	☐	☐	☐	☐	☐
I ask enough questions to accurately diagnose challenges.	☐	☐	☐	☐	☐
I tailor my coaching approach to the lead's needs.	☐	☐	☐	☐	☐
My interventions help leads generate their own solutions.	☐	☐	☐	☐	☐
I help leads identify clear next steps.	☐	☐	☐	☐	☐

Comments/Examples:

Part 4: Meeting Facilitation

Statement	1	2	3	4	5
I establish a clear agenda and desired outcomes for meetings.	☐	☐	☐	☐	☐
I keep meetings focused on agreed priorities.	☐	☐	☐	☐	☐
I balance relationship-building with progressing the work.	☐	☐	☐	☐	☐
I conclude meetings with clear action items and accountability.	☐	☐	☐	☐	☐
I regularly seek feedback from campaign leads.	☐	☐	☐	☐	☐

Comments/Examples:

Part 5: Coaching Rubric Reflection

Rate yourself based on the Campaign Coach "Sweet Spot."

Elicitive

Reflection	Rating
I balance asking questions with offering suggestions when appropriate.	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Directive

Reflection	Rating
I guide meeting structure while remaining flexible and collaborative.	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Transparency

Reflection	Rating
I thoughtfully share observations and assessments without dominating the conversation.	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Experience

Reflection	Rating
I appropriately use personal experiences to support learning.	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Vulnerability

Reflection	Rating
I help leads explore deeper challenges while staying focused on solutions.	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Taskiness

Reflection	Rating
I balance personal connection with accomplishing meeting goals.	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Part 6: Equity-Centered Coaching

Statement	1	2	3	4	5
I intentionally center my campaign lead on those who are most impacted by campaign issues.	☐	☐	☐	☐	☐
I encourage leaders to engage underrepresented stakeholders.	☐	☐	☐	☐	☐
I help campaign leads consider root causes of inequities.	☐	☐	☐	☐	☐
I encourage campaign strategies that advance equity and justice.	☐	☐	☐	☐	☐

Comments/Examples:**Part 7: Strengths and Growth Areas****My Greatest Coaching Strengths**

1. _____
2. _____
3. _____

Areas for Further Development

1. _____
2. _____
3. _____

Professional Learning Goals

1. _____
2. _____
3. _____

Overall Self-Reflection

What coaching accomplishment am I most proud of during this period?

What coaching challenge has taught me the most?

How have I helped campaign leads move forward toward their goals?

What is one commitment I will make to strengthen my coaching practice in the coming months?

Overall Self-Rating: ☐ Developing ☐ Effective ☐ Highly Effective ☐ Exemplary

Observer Coaching Form for Triad Work – Practice 1

Observe whether the coach avoids these ineffective practices.

Potential Trap	Observed?
Providing answers before fully understanding the challenge	☐ Yes ☐ No
Over-preparing solutions	☐ Yes ☐ No
False praise	☐ Yes ☐ No
Only focusing on strengths	☐ Yes ☐ No
Only focusing on weaknesses	☐ Yes ☐ No
Telling people what to do	☐ Yes ☐ No
Excessive criticism	☐ Yes ☐ No

Effective Campaign Coaching Behaviors

Observe whether the coach demonstrates the following throughout the session.

Behavior	Not Yet	Developing	Consistent
Fully present and attentive to another person's experience	☐	☐	☐
Listens with both empathy and analytical thinking	☐	☐	☐
Helps coachee make meaning from successes and challenges	☐	☐	☐
Centers coachee agency and ownership	☐	☐	☐
Supports problem-solving rather than solving problems for others	☐	☐	☐
Asks questions that both support and challenge	☐	☐	☐
Encourages reflection and learning	☐	☐	☐

Evidence Capture Section

This section helps mentor coaches gather specific examples that can be used in feedback conversations.

Coaching Move Observed	Direct Quote or Evidence	Impact on Coachee
Powerful Question		
Observation Shared		
Challenge Offered		
Support Provided		
Reflection Prompt		
Coaching Opportunity Missed		

Observer Coaching Form for Triad Work – Practice 2

Observe whether the coach avoids these ineffective

Potential Trap	Observed?
Providing answers before fully understanding the challenge	☐ Yes ☐ No
Over-preparing solutions	☐ Yes ☐ No
False praise	☐ Yes ☐ No
Only focusing on strengths	☐ Yes ☐ No
Only focusing on weaknesses	☐ Yes ☐ No
Telling people what to do	☐ Yes ☐ No
Excessive criticism	☐ Yes ☐ No

Effective Campaign Coaching Behaviors

Observe whether the coach demonstrates the following throughout the session.

Behavior	Not Yet	Developing	Consistent
Fully present and attentive to another person's experience	☐	☐	☐
Listens with both empathy and analytical thinking	☐	☐	☐
Helps coachee make meaning from successes and challenges	☐	☐	☐
Centers coachee agency and ownership	☐	☐	☐
Supports problem-solving rather than solving problems for others	☐	☐	☐
Asks questions that both support and challenge	☐	☐	☐
Encourages reflection and learning	☐	☐	☐

Evidence Capture Section

This section helps mentor coaches gather specific examples that can be used in feedback conversations.

Coaching Move Observed	Direct Quote or Evidence	Impact on Coachee
Powerful Question		
Observation Shared		
Challenge Offered		
Support Provided		
Reflection Prompt		
Coaching Opportunity Missed		