



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.

Lead Contact:

Amanda Kail
NEA Center for Organizing and Affiliate Support
Akail@nea.org

Manager:

Kyle Serrette
NEA Center for Organizing and Affiliate Support
kserrette@nea.org

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?”

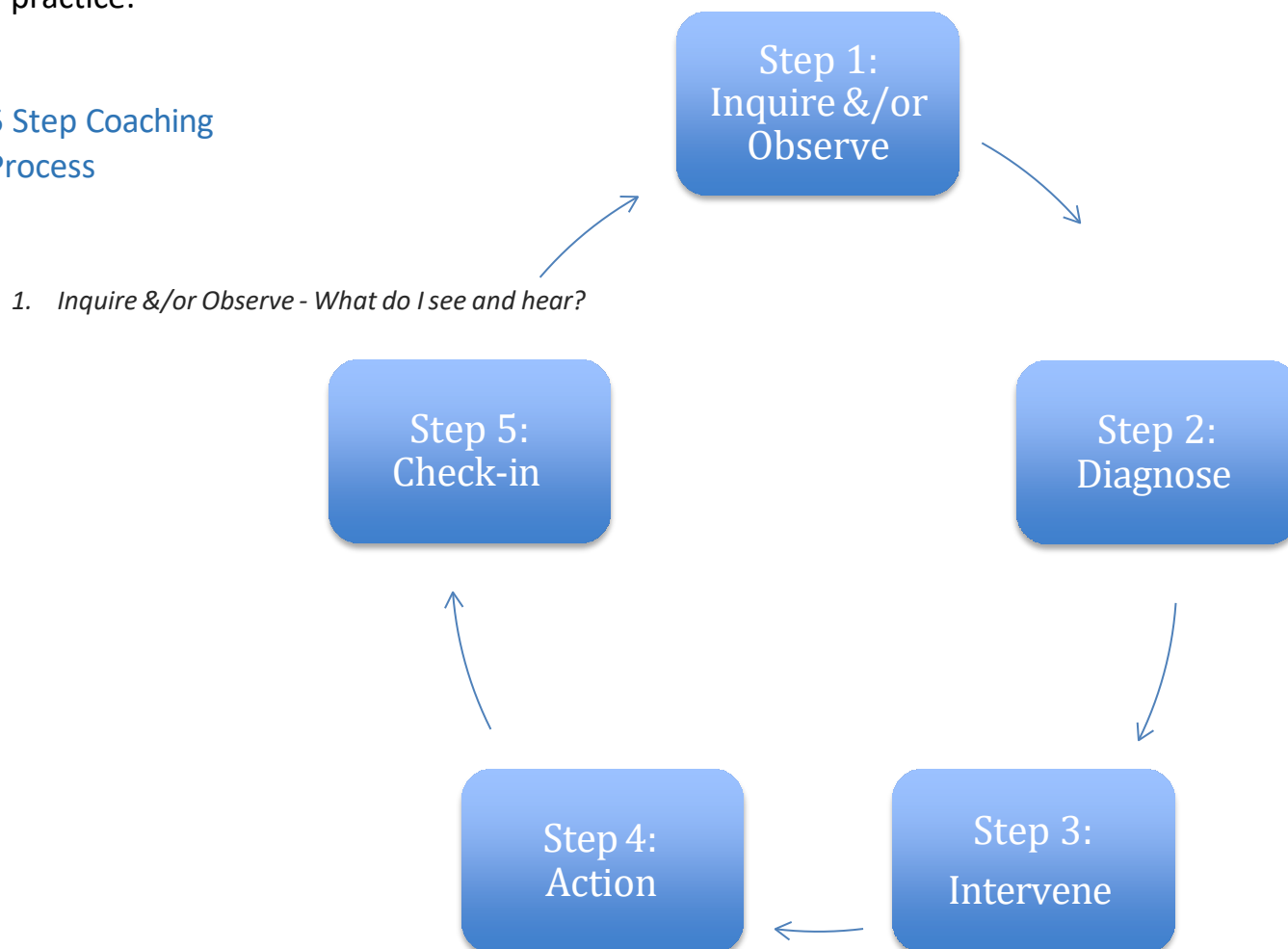
A Question I Could Ask

“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



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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 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?

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



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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” are 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.

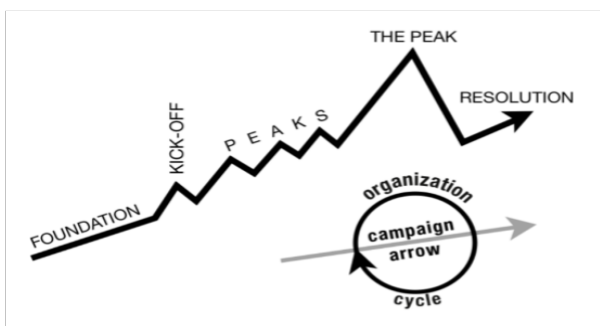
Criteria for good tactics include:

- 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.

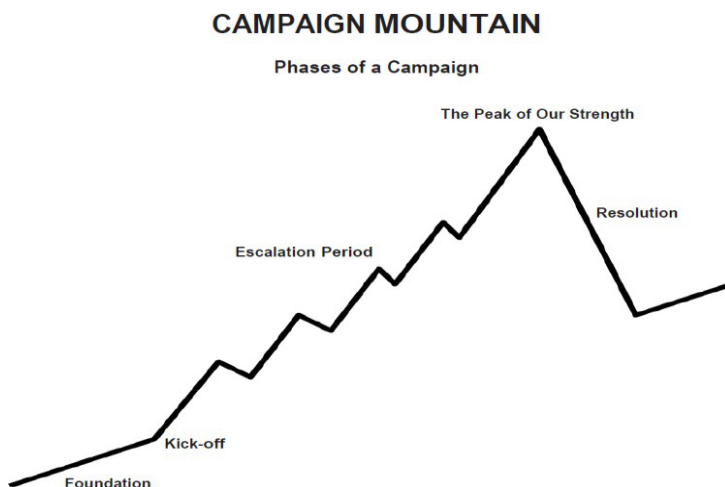
List the tactics above which meet the criteria below:

- 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 Scenario Guide

Campaign Coaches will use the scenarios in this guide to enhance their coaching skills and better support campaign leads.



Scenario 1: 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.

Three years ago, district leaders began proposing significant budget cuts. In response, RVEA's executive board launched a strategic effort guided by a 3-Year Strategic Plan to build a more organizing-focused union. The local divided the district into organizing regions and assigned officers and staff to conduct worksite assessments. Today, every worksite has at least one identified point person, and 70% have functioning Contract Action Teams (CATs). Several larger schools have developed building councils that include representatives from different job classifications.

The local recently expanded its bargaining team from 18 members to nearly 75 members, running an open bargaining campaign with representative members across all classifications, including paraeducators and custodians. Off-contract 'valley' periods are now intentionally leveraged for mobile, site-level contract enforcement training and needs assessments.

To evaluate engagement, RVEA uses Action Builder organizing software to maintain digital wall-charts. Last spring, the local conducted a district-wide petition campaign around staffing shortages as a quantitative structure test to measure supermajority readiness before escalating tactics. Participation reached nearly 80% overall.

The staff role has shifted significantly: staff spend less time handling individual servicing and more time functioning as strategic coaches, training members to resolve Level 1 grievances locally. The local has intentionally recruited leaders from underrepresented job classifications. When a right-wing group attempted to intimidate immigrant families in the district, RVEA rapidly deployed its site-level 1:10 CAT communication trees to partner with community groups for rapid-response defense. However, some members still resist direct conflict with management, clinging to 'respectability politics' and quiet closed-door meetings.

Discussion Questions for Scenario 1

- 1. Dimension Scoring:** What score (1–4) would you assign RVEA across each of the 11 categories of the High Participation Assessment Tool?
- 2. Site Leaders & Staff Role (Dimensions 1 & 2):** What evidence demonstrates that staff are transitioning into strategic coaches and member leaders are taking ownership of Level 1 issues?
- 3. Structure Tests & Data (Dimensions 6 & 11):** How effectively did RVEA use the petition drive as a quantitative structure test, and how are digital wall-charts being used across worksites?
- 4. Valley Work & Strategic Planning (Dimensions 3 & 10):** How is RVEA maintaining momentum during non-bargaining lulls and guarding its strategic plan?
- 5. Conflict & Defense (Dimensions 8 & 9):** Where does RVEA show strengths or growth areas in overcoming respectability politics and building rapid-response community defense infrastructure?

6. Action Planning: What specific coaching recommendations would you offer to help RVEA reach Level 4 ('High Participation Local') across all 11 dimensions?

Scenario 2: The Higher Education Workers Alliance

The Higher Education Workers Alliance (HEWA) represents approximately 1,100 classified staff employees across three public colleges. Historically, HEWA operated on a traditional service model. Membership density hovered around 70 percent, and many members only interacted with the union when facing a contract dispute.

Five years ago, a proposed workforce modernization plan prompted activists to build a statewide campaign focused on compensation equity and job security. Today, membership density exceeds 90 percent. The local created member-led standing committees for research, communications, political engagement, and data analysis. Committee leaders track participation data, charting worksite engagement to evaluate campaign readiness. Staff act as capacity builders and strategic coaches rather than primary problem-solvers.

During non-bargaining 'valley' periods, HEWA maintains active momentum by conducting non-transactional community-labor alliances around economic and social justice. Bargaining is treated as an active, transparent campaign involving open bargaining committees. The local routinely uses escalating structure tests—moving from signed platform pledges to wear-red days and sticker actions—to evaluate member readiness before taking major steps.

Despite these successes, engagement remains uneven. Night-shift custodians and employees at the smallest rural campus participate at lower rates. While the local has begun rejecting respectability politics by organizing collective site actions, some leaders still hesitate to embrace visible conflict with college administrations. Furthermore, while the president has delegated operational tasks, the board struggles to strictly align all activities with a long-term strategic plan.

Discussion Questions for Scenario 2

- 1. Dimension Scoring:** Score HEWA on all 11 dimensions of the assessment tool.
- 2. Bargaining & Structure Tests (Dimensions 4 & 11):** How effectively does HEWA use open bargaining structures and methodical, quantitative structure tests to gauge leverage?
- 3. Valley Work & Community Power (Dimensions 3 & 9):** How does HEWA's non-bargaining work build permanent community-labor alliances and rapid defense capacity?
- 4. Data Systems & Charting (Dimension 6):** In what ways are digital or physical wall-charts and data tracking driving organizing decisions?
- 5. President's Role & Strategic Coherence (Dimensions 5 & 10):** Is HEWA's leadership actively guarding a democratized strategic plan, or are they still caught in operational firefighting?
- 6. Equity & Barriers:** What steps must HEWA take to eliminate participation gaps among night-shift workers and rural campus staff to achieve true majoritarian power?

Scenario 3: Building a Union Beyond Bargaining

The Capital Community College Educators Association (CCCEA) represents approximately 900 faculty, professional staff, and adjunct instructors. Nearly 85% of members are adjunct or part-time employees. For years, knowledge and decision-making were concentrated in a tiny core of officers, and general membership meetings drew fewer than 20 people.

Recognizing that the local was stuck in reactive firefighting, the leadership co-created a clear Strategic Roadmap. They shifted away from passive committees and embraced a 1:1 relationship-based organizing model. This strategy successfully rebuilt the steward network, recruiting and training 8 new site leaders capable of building 1:10 communication networks and managing Level 1 issues locally.

The local operates multi-tiered training programs ('Skills to Win') during non-bargaining 'valley' periods, focusing on 1:1 conversations, mapping, and contract enforcement. Staff have begun stepping back to allow member stewards to take ownership of site organizing.

However, major gaps remain. CCCEA has struggled to implement quantitative structure tests (such as petition threshold gates or sticker days) to systematically test member readiness. Its data management is largely administrative, lacking active digital wall-charts or site mapping. While the local has engaged in mutual aid and coalition building, its rapid-response mechanisms for broader community/anti-authoritarian defense are in their infancy. Leaders also struggle with 'respectability politics,' often preferring quiet administrative dialogue over direct, collective workplace actions.

Discussion Questions for Scenario 3

- 1. Dimension Scoring:** Assign a score (1–4) for CCCEA across each of the 11 dimensions.
- 2. Site Leadership & Training (Dimensions 1 & 7):** How successful has CCCEA been in building a 1:10 CAT/steward structure and establishing multi-tiered training pipelines?
- 3. Overcoming Respectability Politics (Dimension 8):** What holds CCCEA back from moving beyond polite labor-management meetings into direct collective action?
- 4. Data & Structure Tests (Dimensions 6 & 11):** Why is the lack of digital wall-charting and quantitative structure tests limiting CCCEA's bargaining power?
- 5. Strategic Plan & Valley Work (Dimensions 3 & 10):** How effectively is the local utilizing non-bargaining periods to execute its Strategic Roadmap?
- 6. Structural Barriers:** How can CCCEA adapt its organizing and meeting structures to better engage its 85% adjunct workforce?

Scenario 4: Building Visibility, Trust, and Collective Action in Challenging Times

The Lakeshore Education Association (LEA) represents 1,800 educators and support professionals. While historically strong during contract fights, engagement outside bargaining cycles has been inconsistent.

Faced with severe community polarization, hostile social media attacks against staff, and anti-inclusive political pressure, a group of activists began organizing around student wellness, inclusion, and safety. The local used this crisis to build an anti-authoritarian, rapid-response network, partnering with youth, civil rights, and social justice organizations to protect vulnerable students and staff.

LEA upgraded its communication infrastructure and began offering mobile, on-site trainings to build member confidence. To overcome the fear of conflict and 'respectability politics,' site leaders organized collective visibility actions (such as wearing red and displaying classroom solidarity signs) to demonstrate protected unity in the face of public hostility.

Despite these advances, LEA's organizing foundation remains incomplete. The local does not use digital wall-charts or systematic data tracking; leaders rely on anecdotal guesswork rather than mapped worksites. Escalating structure tests with strict mathematical thresholds (e.g., 70–80%+ sign-ons) are not utilized before taking public stances. The local president continues to absorb administrative and crisis-management tasks rather than fully delegating turf organizing. Furthermore, bargaining remains relatively traditional rather than open and mass-representative.

Discussion Questions for Scenario 4

- 1. Dimension Scoring:** Evaluate LEA and assign a score (1–4) for each of the 11 categories.
- 2. Defensive Organizing & Respectability Politics (Dimensions 8 & 9):** How has LEA overcome fear and respectability traps to build rapid-response protection against external political threats?
- 3. Data Systems & Structure Tests (Dimensions 6 & 11):** How does the absence of active wall-charting and quantitative structure tests put LEA's campaigns at risk?
- 4. President's Role & Staff Role (Dimensions 2 & 5):** Is the local president operating under a 'choir model' of shared leadership, and are staff functioning as strategic coaches?
- 5. Valley Work & Bargaining (Dimensions 3 & 4):** How can LEA connect its non-bargaining community-defense work directly to its upcoming contract campaign?
- 6. Equity Practices:** What specific structural changes are needed to engage newer educators and low-income building staff who remain underrepresented in leadership?

Scenario 5: Vision to Action? Assessing the River City Educators Association

The River City Educators Association (RCEA) represents 5,500 educators in a large urban district. The local has a long history of traditional mobilization during contract fights. Two years ago, RCEA launched a major initiative, 'The Schools Our Students Deserve,' to transition from reactive firefighting to a proactive, community-centered vision.

The executive board co-created a democratized Strategic Plan centered on ten core goals, guiding budget allocations and aligning public campaigns. RCEA forged deep, permanent alliances with parent groups, civil rights organizations, and labor partners, bringing 'common good' demands directly into its collective bargaining strategy. Off-contract 'valley' periods are used to run continuous workshops and community forums.

RCEA's president actively delegates turf organizing and guards the strategic roadmap. The local has rejected respectability politics, using collective site actions and public demonstrations to advance its bold demands. Staff operate primarily as strategic coaches and capacity builders.

However, internal execution across worksites is highly uneven. While some schools maintain active 1:10 CATs and digital wall-charts (Action Builder), many rely on a single building rep who acts as an isolated information relay. The local rarely executes methodical, quantitative structure tests (e.g., strict 80% platform pledge gates) before launching actions, leading to inconsistent turnout. Training programs remain centralized rather than utilizing a decentralized 'gradual release' model across all sites.

Discussion Questions for Scenario 5

- 1. Dimension Scoring:** Assign a score (1–4) across all 11 dimensions for RCEA.
- 2. Strategic Plan & President's Role (Dimensions 5 & 10):** How effectively does RCEA's leadership guard the strategic roadmap and prevent reactive firefighting?
- 3. Collective Bargaining & Valley Work (Dimensions 3 & 4):** In what ways does RCEA model high-participation bargaining and permanent non-transactional community alliances?
- 4. Site Leadership & Structure Tests (Dimensions 1 & 11):** Why is the lack of site-level CATs and mathematical structure tests causing uneven participation across schools?
- 5. Training & Data (Dimensions 6 & 7):** How can RCEA upgrade its training pipeline and wall-charting systems to build true rank-and-file capacity?
- 6. Organizational Capacity:** What concrete steps should the newly formed Organizing and Advocacy Committee take to turn RCEA's high-level vision into uniform site-level power?

Level 4 Benchmarks from the High Participation Assessment Tool

Dim #	Category Name	Level 4 Benchmark (High Participation Local)
1	Site Leaders & CATs	Active 1:10 CATs/Organizing Squads; Level 1 issues handled locally; equity embedded in rank-and-file recruitment.
2	Union Staff Role	Staff function primarily as strategic coaches and capacity builders; clear separation of servicing from organizing.
3	Valley Work (Lulls)	Off-contract lulls intentionally leveraged for site enforcement, mobile training, and permanent community-labor alliances.
4	Collective Bargaining	Open, massive, representative bargaining teams; radical transparency; community-centered 'common good' demands.
5	Local President's Role	Focuses on strategic coordination, delegation, and budget reallocation; guards plan; uses 'choir model' pacing.
6	Data Systems & Power	Decentralized, active digital wall-charts (Action Builder/OrgDB) used to evaluate supermajority campaign readiness.
7	Member Training	Active, multi-tiered pipelines ('Skills to Win') using a gradual release model with mobile/on-site workshops.
8	Overcoming Respectability	Rejects respectability traps/quiet meetings; 1:10 CAT networks turn isolated fear into protected collective leverage.
9	Defensive Organizing	Repurposes strike/CAT infrastructure for rapid-response community defense (ICE defense, LGBTQ+ youth, civil rights).

10	Strategic Plan & Coherence	Co-created roadmap drives all operations; strict alignment between annual launches, budget, and worksite visits.
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11	Methodical Structure Tests	Deploying escalating quantitative tests (70–80%+ gates) to mathematically confirm supermajority readiness before escalating.
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High Participation Local Self-Assessment Tool

Rating Scale

- 1: Servicing Participation
- 2: Emerging Participation
- 3: Growing Participation
- 4: High Participation Local

1. School Site Leaders & Contract Action Teams			
How empowered and organized are school site member leaders and teams?			
1 (Servicing): Site leaders primarily relay information; equity and member access are not considered.	2 (Emerging): Site leaders occasionally assist with workplace concerns and begin recognizing participation gaps across underrepresented groups.	3 (Growing): Site leaders/CATs organize members, handle Level 1 grievances locally, build 10:1 communication networks, and intentionally recruit leaders from diverse job titles, classifications, and backgrounds.	4 (High): Site leaders confidently handle Level 1 concerns locally, manage active 1:10 CATs/Organizing Squads, and run building councils. Equity is embedded in leadership identification, ensuring rank-and-file teams reflect the full diversity of campus staff.

2. The Union Staff Role - Who owns the work—the staff or the members?			
1 (Servicing): Staff act as primary problem-solvers, handling individual grievances, organizing, and communications. Servicing and equity considerations are absent.	2 (Emerging): Staff begin involving member leaders in union work; training occurs occasionally with growing awareness of representational equity gaps.	3 (Growing): Staff regularly coach worksite leaders and support member-led campaigns, structurally separating individual representational servicing from field organizing.	4 (High): Staff function primarily as strategic coaches, capacity builders, and organizers. Staff train members to resolve Level 1 issues, analyze data through an equity lens, and build sustainable, member-driven systems across all job classifications.

3. Valley Work (Non-Bargaining Lulls)

How does the local stay active and build power during non-bargaining periods?

1 (Servicing): Union activity completely pauses between contracts; no ongoing workplace organizing or community connection exists.	2 (Emerging): Local occasionally offers workshops or events during lulls, with initial attempts to engage broader member groups.	3 (Growing): Local organizes around local site fights, contract enforcement, and continuous skill-building workshops during lulls while building relationships with community partners.	4 (High): Off-contract lulls are intentionally leveraged for site-level enforcement, needs assessments, continuous mobile training, and permanent, non-transactional community-labor alliances (e.g., racial, social, and economic justice partnerships).

4. Collective Bargaining in High-Participation Locals

How is collective bargaining structured and executed?

1 (Servicing): Bargaining is closed-door, secret, and handled by third parties or small isolated committees with strict ground rules.	2 (Emerging): Local shares occasional bargaining updates and surveys members on contract priorities.	3 (Growing): Local expands bargaining teams, uses plain-language proposals, and conducts site-level briefings to build member awareness.	4 (High): Bargaining is treated as an active organizing campaign with open, massive, representative bargaining teams (reflecting all job classifications/backgrounds), radical transparency, and community-centered "common good" demands.

5. Being a President of a High-Participation Local

How does the local president lead and distribute organizational power?

1 (Servicing): President acts as an administrative crisis manager, top-down decision-maker, and primary grievance handler.	2 (Emerging): President encourages participation but retains primary operational and political responsibilities.	3 (Growing): President guards the strategic plan, coordinates leadership teams, and reallocates resources toward organizing and member capacity.	4 (High): President focuses on strategic coordination, political diplomacy, geographic turf organizing, and budget reallocation. They actively delegate power, guard the strategic plan ("if it's not on the plan, it's not happening"), and foster a "choir model" of shared leadership pacing to prevent burnout.

6. How High-Participation Locals Use Data to Build Power

How are data systems utilized across the local?

1 (Servicing): Data management is purely administrative and passive (dues tracking, static lists).	2 (Emerging): Data is occasionally reviewed after campaigns to evaluate turnout.	3 (Growing): Data informs organizing decisions; site leaders begin tracking meeting attendance and petition signers.	4 (High): Data management is decentralized and active. Leaders analyze digital wall-charts (Action Builder/OrgDB) and run quantitative structure tests (e.g., physical paper petitions) as "gates" to evaluate supermajority campaign readiness and address engagement gaps across diverse subgroups.

7. How High-Participation Locals Train Their Members

How does the local build rank-and-file organizing capacity?

1 (Servicing): Training is non-existent, top-down, or limited to reading static policy documents.	2 (Emerging): Occasional ad-hoc trainings are offered for newly elected building reps.	3 (Growing): Local offers structured skill workshops (e.g., 1:1 conversations, charting) and reduces barriers through accessible meeting times.	4 (High): Local operates active, multi-tiered training pipelines (e.g., Summer Institutes, Member Organizer cohorts, "Skills to Win") using a "gradual release" model (from staff modeling to autonomous member execution) with mobile, on-site, and rotational workshops.

8. Overcoming "Respectability Politics" and the Fear of Conflict

How does the local navigate workplace conflict and authority?

1 (Servicing): Local relies on "respectability politics," assuming polite, closed-door labor-management meetings resolve disputes.	2 (Emerging): Growing awareness that quiet meetings yield limited results, but leaders hesitate to organize visible collective pressure.	3 (Growing): Worksite leaders occasionally organize collective site actions (e.g., petition deliveries, wear-red days) to enforce contract rights.	4 (High): Local actively rejects respectability traps and "moral victories," focusing on concrete demands backed by collective leverage. 1:10 CAT networks transform isolated fear into collective confidence and protected solidarity.

9. Defensive Organizing & Anti-Authoritarian Protection

How does the local respond to political, civil rights, and community threats?

1 (Servicing): Union does not respond to community or political crises outside standard contractual scope.	2 (Emerging): Local issues statements or attends community rallies during major political or civil rights crises.	3 (Growing): Local coordinate with community organizations on specific defense efforts (e.g., voter education, student safety).	4 (High): Local repurposes its site-level communication trees and strike infrastructure for rapid-response community defense (e.g., protecting immigrant families/ICE defense, supporting LGBTQ+ youth, and election protection).

10. The Strategic Plan—Guarding the Roadmap and Building Coherence

How does the local align its vision and prevent reactive firefighting?

1 (Servicing): Planning is non-existent; local operates in continuous reactive firefighting mode.	2 (Emerging): Annual goals exist but are regularly set aside when daily operational crises occur.	3 (Growing): A strategic plan guides major campaign cycles and budget allocations.	4 (High): A co-created, democratized strategic plan (distilled into a clear roadmap) drives all operations. The local distinguishes structure-building from issue campaigns, aligns annual launches around the roadmap, and systematically executes program-driven worksite visits.

11. Methodical Structure Tests—Measuring Member Readiness

How does the local evaluate member leverage before escalating campaigns?

1 (Servicing): Local relies on guesswork or assumptions, jumping into escalations without testing member readiness.	2 (Emerging): Local tracks basic participation metrics (e.g., online survey response counts).	3 (Growing): Local uses simple structure tests (e.g., button days, wear-red days) to gauge member engagement before major events.	4 (High): Local deploys an escalating sequence of quantifiable structure tests (e.g., 1:1 signed platform pledges, sticker days, strike vote pledges) with strict majoritarian thresholds (70–80%+ active participation) acting as mathematical "gates" to confirm supermajority readiness.
Total of All Dimensions			

Calculating Total Score & Organizational Readiness Level

Sum the agreed consensus scores across all 11 categories (Maximum Total Score: 44 Points). Match the total score to the corresponding Organizational Tier:

Score Range	Organizational Tier	Dominant Model	Strategic Priority
11 – 18	Tier 1: Servicing Local	Reactive / Third-Party Servicing	Rebuild steward/Member networks; basic 1:1 training.
19 – 27	Tier 2: Emerging Local	Transitioning / Hybrid Model	Implement wall-charts; launch basic structure tests.
28 – 36	Tier 3: Growing Local	Organizing / Member-Driven	Decentralize training; build rapid community defense.
37 – 44	Tier 4: High Participation Local	Supermajority Power Engine	Sustain choir pacing; guard strategic roadmap.

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

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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	☐	☐	☐

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Support Provided		
Reflection Prompt		
Coaching Opportunity Missed		