



Coaches Academy



Pre Attendance Handouts

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

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Pre-Attendance Assignment Descriptions

Welcome to NEA's Campaign Lab Coaching Academy. This is an in-person event. It is required that you complete all modules in this pre-attendance session. Please download and complete the following Pre-Attendance Activities Before Arriving.

Why Pre-Academy Assignments? The resources compiled here are short, relevant, and intended to help you shift from the day-to-day cognitive load of work to the thinking you will use as a learner at the academy. It should take no longer than 6 hours to complete the entire pre-attendance package. There are 8 modules, two articles to read, one brief writing activity, and scenarios that need to be completed and reviewed before your arrival. They are listed below.

Module 1: Pre-Academy Assignments (Approximate time to Complete - 6 Hours Total)

There is a fillable form PDF of the entire Pre-Academy Assignment Package that you must download to your device before working on it, or your work will not be saved. If you prefer paper to device, you will need to print this document and complete the assignments on the document. Be sure to bring your copies with you as there will be no printed versions on site.

Module 2. Building Inclusive Union Communities: Community Agreements in Action (required) – Please complete this module and pages of the pre-attendance package that are our Community Agreements before attending. We will be doing an activity on day one in the first 30 minutes that requires your prior reading of these. There is a copy of these along with reflection questions for you to complete in the pre-attendance package.

Module 3. Coaching Foundations for Campaign Lab Coaches (required) – This module will equip you with the historical roots, essential frameworks, and practical tools of campaign coaching to help you grow strong, strategic organizers and leaders in your union. Discover how coaching can transform organizing efforts, deepen your capacity to support new organizers, and foster a culture of learning and empowerment. Through a blend of movement history, proven coaching models, and actionable techniques, you'll gain the confidence and skills to lead, inspire, and develop others through transformational conversations that drive real change in public schools. ***The article included in your handouts named “ Ella Baker’s Legacy: A Different Model of Leadership” should be read alongside this module.***

Module 4. Centering Equity in Campaigns (required) - This module is designed for Campaign Lab Team Leads and Coaches. It helps participants integrate race, class, and gender equity into every stage of their campaign planning. Participants will apply a specific Equity Tool to help them identify systemic barriers, set measurable equity-focused goals, and use practical tools to ensure their campaigns build power with those most impacted by

oppression. By the end, learners will have the skills to proactively advance equity and foster meaningful change within their organizations and communities. This module is designed to be used with the handout titled, "Centering Equity in your Campaigns."

Module 5. Building and Coaching High Participation Locals in Education Unions

(required)– This course module aligns with the High Participation Local Assessment Tool. This module empowers union staff, member-leaders, and coaches in education unions to build and sustain high participation locals. Through hands-on tools, real-world case studies, and equity-driven strategies, you'll gain the skills to assess your organization's strengths, develop distributed leadership, and design targeted interventions for lasting impact. Discover how to move beyond traditional service models and unleash the full power of your membership to win on the issues that matter most. ***The article included in your Pre-Attendance handouts, Problem Solving: From Good Service to Centering Worker Agency, should be read alongside this module.***

Module 6, Coaching Organizers through the Campaign Cycle (required)– This module will guide you through the essential practices for coaching campaign organizers, from foundational coaching mindsets to advanced strategies for equity, power-building, and adaptive leadership. You'll learn how to ask the right questions, facilitate structured campaign planning, and support organizers in moving from big ideas to concrete, winnable actions. Through reflective and pragmatic lessons, you'll gain the tools to foster leadership, accountability, and sustained impact in every stage of the campaign cycle.

Module 7. Campaign Coach Self-Assessment Introduction (required)– This module introduces you to the essential skills and reflective practices needed to become an impactful campaign coach in the NEA Campaign Lab. You'll explore foundational coaching competencies, learn to assess and develop your coaching abilities, and discover how to center equity in every conversation. Whether you're a union staff member, leader, or new coach, this course will help you build confidence and clarity as you begin your coaching journey. This self-assessment is found in your pre-attendance package. Make sure to complete this and that you have access to either a completed paper version or a completed electronic version on your device.

Module 8. Using the Wheel of Privilege for Equity-Centered Union Organizing (required)

– This module is designed for new Campaign Lab Coaches supporting public school employees. This course invites you to explore the powerful role of intersectionality in building trust, credibility, and effective relationships. Through practical reflection and guided activities, you'll discover how the Wheel of Privilege can deepen your self-awareness, enhance your equity lens, and strengthen your impact as an organizer and leader. You will complete the Wheel of Privilege handout that is included in the Pre-

Attendance Package. Make sure you have access to either a printed-out version or an electronic version on your device. This includes the Guided Reflection Questions page.

Writing Activity: Your Campaign Story - Please prepare a story of a campaign you were part of for one of our coaching sessions. In your pre-attendance handouts, there is a handout named “Writing Your Campaign Story” that will provide guidance. Use the following checklist as a guide to frame your campaign story. It does not need to include all the components, nor be a winning campaign. It simply needs to be an honest story from your perspective about the campaign with enough detail to allow you to be coached during one of our practice sessions.

Review of Scenarios: There are a number of scenarios that we will be using during our time together. Sometimes individuals struggle with reading while in a group. It is strongly suggested that you read the scenarios in advance so that the first time you are experiencing them is not in our training room.

Module 10. Participant Handouts (Required Action: Download to your device or print before arriving) - the file *Participant Handouts* is a fillable PDF file, and **YOU MUST DOWNLOAD** it to your device before you begin working on it, or your work will not be saved. If you prefer paper copies and handwriting your work, you will need to print these before arriving. There will be no paper copies provided on-site.

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.

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?

Diagnosis Scenarios

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.

High Participation Local Self- Assessment

Rating Scale

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

1. Distribution of Union Work

Who does the work of the union?

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

2. Worksite Representative Capacity

How capable are worksite leaders?

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

3. Organizing Data

How are data used?

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

4. Member Engagement

What percentage of members take action?

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

5. Organizing Conversations

How often are members engaged one-on-one?

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

6. Budget Alignment

What does the budget build?

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

7. Worksite Structures

How strong are organizing structures?

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

8. Internal Communication Systems

How do members learn and act?

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

9. Campaign Readiness

Can the local run a winning campaign?

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

10. Coalition & Community Power

How connected is the local to broader community movements?

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

11. Role of Union Staff

Who owns the work—the staff or the members?

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

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

12. Role of Union Leaders

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

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

13. Centering Equity

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

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

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

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

Scoring and Interpretation Process of the Self-Assessment

Step 1: Rate Each Category

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

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

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

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

Step 2: Calculate the Overall Score

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

Overall Score Interpretation

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

Campaign 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

Writing Your Campaign Story

Use the following checklist as a guide to frame your campaign story. It does not need to have all the components and it does not need to have been a winning campaign. It needs to be an honest story from your perspective about the campaign.

Component of a Campaign Cycle	Was this an evident part of your campaign ?
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)	