Complete Coach's Guidebook

Guidebook Contents

nea NATIONAL EDUCATION ASSOCIATION

CAMPAIGN LAB
WE ORGANIZE. WE WIN.

Quick Start Guide for New Campaign Coaches

Congratulations on becoming a new campaign coach for the NEA Campaign Lab! This guide is meant to guide you through the first two months of your new role.

Steps to Get Started

1. Attend an onboarding meeting with your mentor coach and Campaign Lab staff.
2. Work with a mentor coach to complete a 3-session coaching practicum.
3. After the practicum, you will schedule coaching calls with your lead two times per month going forward.
4. Your mentor coach will remain on call if you need assistance

The Role of Campaign Coach

Different organizations think about the role of a campaign coach differently. For the purposes of the NEA Campaign Lab, you are a thought partner for a campaign lead. You don't have to be an expert at all things campaigning, but you do need to have good active listening skills and be willing to learn what you don't know.

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 does a typical campaign coaching meeting look like?

Use the sample agenda to plan your coaching sessions. Meetings should be about 1 hour.

<u>Sample Coaching Meeting Agenda with Script</u>

1. Check in. *"How are you?"*

2. Review agenda and decide on outcomes for the meeting. *"Here's what I have in my notes to discuss today. Is there anything you want to add or change? What do you want to have figured out by the end of this meeting* so *I can make sure we focus our time there?"*

3. Important campaign updates. *"The last time we spoke, you told me the campaign was at the (__) stage. Has anything big changed since then?"*
4. Discuss key questions that will land the agreed upon outcomes. *

5. Secondary topics/challenges. *"What else feels urgent?"*

6. Next steps. "Ok, what's landed for you in this conversation? What next steps will you take to address the challenges we discussed today? And just confirming that our next meeting is ___."

7. Closing reflection. *"How is this going? What was most helpful about today?"*

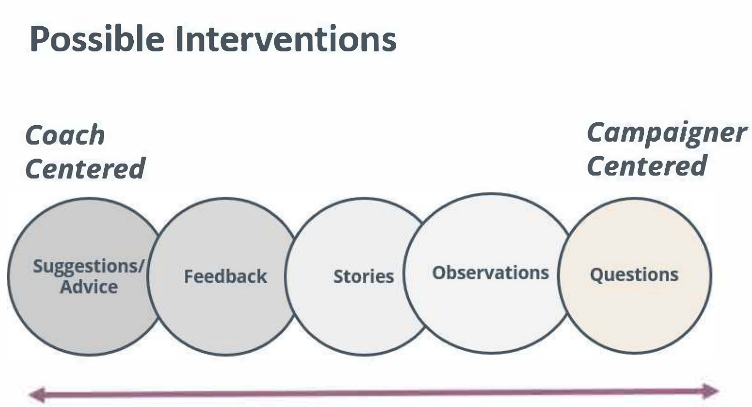
*Majority of your time should be spent on this item. See sample coaching questions on page 5 for ideas on possible questions to ask during this segment.

What Campaign Coaches Do- Diagnosis and Intervention

Campaign coaches listen to campaign leads and try to diagnose problems. Then, they intervene by offering support.

Most of the problems you will hear fall into three categories: motivational, strategic, or skills-based. The campaign lead is usually struggling with taking action (motivation), figuring out a path forward (strategic), or knowing how to do something (skills based). Identifying the category helps you to understand **what** the lead needs to hear as a response. For example, If they are struggling with doing one-on-one conversations, it's important to find out enough information to know if they don't know how to do one, or if they are avoiding getting them done because they are feeling anxious about talking to people they don't know or aren't friends with.

Once you figure out what the lead is struggling with, think about **how** you will help. Your interventions should be as "campaigner centered" as possible, meaning **your intervention should help the campaign lead come to their own answers.** To do that, questions are the most effective method, and advice is the least effective.



Other Important Campaign Lab Information

The Commitment (what you give)

- Remotely coach 1-2 participating Campaign Lab teams; coaching 1 team is a ~5-hour per month commitment; coaching 2 teams is a ~9-hour per month commitment.
- Engage in the following activities: coach local teams and team leads; plan, reflect on, and document coaching calls; participate in virtual trainings and workshops; participate in peer-to-peer problem-solving calls with other coaches; engage in follow-up check-ins with local teams between coaching sessions.
- An initial 12-month commitment, with the possibility of extending the commitment upon successful completion of an initial coaching cycle.

The Opportunity (what you receive)

- A stipend of $1,100 for coaching 1 local team or $1,800 for coaching 2 local teams for one year, with the option to extend. You must complete a coaching contract to receive your stipend. If you haven't received a contract, email Kyle Serrette at kserrette@nea.org.
- Foundational training in methods and tools for coaching campaigns.
- The opportunity to participate in a historic national campaign committed to promoting, protecting, and strengthening public education.

Link for Coaching Notes.

- Please document your coaching calls at this link- Campaign Coach Notes – Fill out form

<u>All Call Meetings</u>

You are expected to attend Campaign Lab All Call Meetings. All meetings are on zoom. If you haven't received a calendar invite with the zoom link, please email Amanda Kail at akail@nea.org. Remaining dates for 2026 are:

- June 23rd
- July 21st
- August 18th
- September 22nd
- October 27th
- November 17th
- December 8th

<u>The Seed Grant</u>

Campaign leads can apply for a $2500 Seed Grant once every twelve months. Applications are rolling, but funds are awarded three times per year: February, June, and November. It is important that the lead has a plan for how to use the funds for their campaign before they apply. Please encourage them to share their plans with you for feedback before submitting a request. The grant can be used for most common campaign expenses, such as printing costs, stickers, T-shirts, buttons, and food or other supplies for events or actions.

To apply for a seed grant, the lead submits a grant request at this link. Campaign Lab staff review the request and meet with leads to suggest changes as needed. Once the request has been approved, the campaign lead will receive a link to put their grant directly into Blackbaud, the NEA grant system.

2026 Campaign Lab Trainings

Campaign Lab offers four in-person trainings for Campaign Lab Participants. Registration is limited, so you are encouraged to enroll early.

As a campaign coach, we HIGHLY recommend that you enroll in the Coaching Academy. This training covers coaching and campaigning fundamentals, as well as how to coach a lead through a campaign. Go to https://www.nea.org/UD-Org-Support/campaign-academies for information on the trainings and how to enroll.

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 Practicum

Campaign Coaches will work with a mentor coach for three coaching sessions in a gradual release model. The mentor coach will lead the first meeting, and the campaign coach will observe. The mentor coach and campaign coach will co-lead the second meeting, and the campaign coach will lead the third meeting, with the mentor coach observing.

The mentor coach and campaign coach will debrief after every meeting.

At the conclusion of the third meeting, the mentor coach will either recommend that the campaign coach is ready to continue coaching independently or that the campaign coach needs more support. The mentor coach and Campaign Lab staff will discuss and create further support as needed.

Meeting 1- "Getting to Know You"

The mentor coach will facilitate and take the lead in this meeting. The campaign coach will complete the observation notes during the meeting.

Goals:

- Get to know each other
- By the end of the second meeting, have enough clarity between coach and campaign lead to be able to identify a goal and what the lead wants as a focus of coaching.

AGENDA (with notes)

1. **Introductions**- what brought you to this work (being a campaign lead, being a campaign coach).
2. **Describe the campaign. What is the goal? Who is going to do the work to win the goal? How will you win?** Note- Often, the campaign lead will describe several problems such as having a hostile school board, low morale, high turnover, budget cuts, worker safety etc., but they won't have a concrete goal. The mentor coach will model asking questions to help the campaign lead clarify their answers.
3. **Where do you want to focus our coaching for now?** Note- if they aren't sure, offer this menu of options:
    a. Building a team
    b. Increasing participation in the campaign
    c. Making a plan to win
    d. Following up and tracking progress
    e. Identifying and recruiting new leaders
    f. How to pivot- your campaign is stalled or finished. Now what?
4. **Next Steps**- Set date/time for next meeting. The Campaign Lead's goal for the next meeting is to be able to answer both questions 2 and 3 if they haven't yet. If they have answered it, ask the Campaign Lead what they want to have accomplished by your next meeting so you can check in and begin the coaching process.

Debrief- At the conclusion of the meeting, the mentor coach and campaign coach should debrief and plan for the next meeting.

1. Review and discuss the observation notes from the coach.
2. Review and discuss the session based on the coaching rubric.
3. Create an agenda and divide up who will lead which part. You can use the sample agenda provided in this guide.

Meeting 2 – “Clarifying the Goal/Starting the Coaching Process”

The mentor coach and campaign coach will facilitate this meeting together based on the agenda they co-created after the last meeting. The following general coaching meeting agenda can be used going forward:

Sample Coaching Meeting Agenda

1. Check in
2. Review agenda and decide on outcomes for the meeting.
3. Important campaign updates.
4. **Discuss key questions that will land the agreed upon outcomes**.*
5. “What else feels urgent?”- Secondary topics/challenges
6. Next steps
7. Closing reflection- How is this going? What was most helpful about today?

*Majority of your time should be spent on this item.

Debrief- Mentor coach and campaign coach use the coaching rubric to guide their debrief and will plan the agenda for the next meeting. Mentor coach will give feedback to campaign coach using the Coaching Rubric.

Meeting 3- “Coaching Launch”

The campaign coach will lead this whole meeting. The mentor coach will assess the campaign coach using the Coaching Rubric.

Debrief- Mentor coach and campaign coach use the Coaching Rubric to guide their conversation and plan the agenda for the next meeting. Mentor coach will give feedback to campaign coach using the Coaching Rubric.

Coaching Rubric- What Makes a Good Campaign Coach?

	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 and 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	Only staying on the 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"

Coaching Observations and Notes Template (For Use by Coach in Setting Up Meeting WIth Lead)

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?"

Additional Resources

Alliance to Reclaim Our Schools (AROS)- Free the Future

https://beautifultrouble.org/

https://practicalradicals.org/podcast-episodes/

Campaign Strategy Workbook

Mentor Coach Observation Guide

Holistic Observation Tools
Evidence Summary Pages
Domains of Coaching
Evidence to Look For
Indicators

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Mentor Coach Holistic Observation Tool

Coach Observed: ________________________ **Mentor Coach:** ________________________

Date: ________________________ **Length of Observation:** __________________

Rating Scale

Rating	Description
1	Strongly Ineffective Practice (Far Left or Far Ride Side of Continuum)
2	Some Emerging Skills but Often Leans to Ineffective Practice on Left Side
3	Some Emerging Skills but Often Leans to Ineffective Practice on Right Side
4	Effective Practice, Leans Mostly to the Sweet Spot
5	Strong Effective Practice, Consistently Balanced ("Sweet Spot")

Mentor Coach Holistic Observation Rubric

1 – 2 – 3 – 4 – 5 – 4 – 3 – 2 - 1					
Coaching Domain	**Ineffective (Left Side) 1-2-3-4**	**Effective ("Sweet Spot") 5**	**Ineffective (Right Side) 4-3-2-1**	**Observed Evidence**	**Rating (1-5)**
Elicitive	Primarily gives advice, answers, and solutions.	Uses questions to help the coachee think through challenges while selectively offering suggestions or expertise when helpful.	Only asks questions and avoids providing guidance when it would be useful.	*Questions asked, examples of advice given, moments where ownership remained with coachee, etc.*	☐1 ☐2 ☐3 ☐4 ☐5
Directive	Coach determines agenda and focus without collaboration.	Collaborates with coachee to identify priorities and remains flexible as needs emerge.	Provides little structure and simply follows whatever arises.	*How agenda was established, shifts in focus, evidence of collaboration, etc.*	☐1 ☐2 ☐3 ☐4 ☐5

1 – 2 – 3 – 4 – 5 – 4 – 3 – 2 - 1					
Coaching Domain	**Ineffective (Left Side) 1-2-3-4**	**Effective ("Sweet Spot") 5**	**Ineffective (Right Side) 4-3-2-1**	**Observed Evidence**	**Rating (1-5)**
Transparency	Frequently leads with opinions, judgments, and interpretations.	Shares observations and assessments while inviting reflection and dialogue.	Avoids offering observations or perspectives.	*Specific observations shared, how assumptions were tested, coachee responses, etc.*	☐1 ☐2 ☐3 ☐4 ☐5
Experience	Operates from an "expert" stance and frequently centers own experience.	Uses personal experience strategically to support learning and insight.	Rarely contributes useful experience or examples.	*Stories shared, lessons offered, how focus returned to coachee, etc.*	☐1 ☐2 ☐3 ☐4 ☐5
Vulnerability / Depth	Remains at surface-level problem solving.	Balances practical challenges with curiosity about deeper patterns, beliefs, and assumptions.	Consistently pushes for deeper exploration regardless of readiness or need.	*Examples of reflective questions, pattern spotting, exploration of underlying issues, etc.*	☐1 ☐2 ☐3 ☐4 ☐5
Taskiness	Focuses almost entirely on business, plans, and tasks.	Balances authentic relationship building with accomplishing meaningful work.	Focuses primarily on connection and conversation without moving work forward.	*Rapport-building moments, accountability conversations, movement toward goals, etc.*	☐1 ☐2 ☐3 ☐4 ☐5

Effective Coaching Practices Observation Table

Coaching Practice	Observed Evidence	Rating
Demonstrates presence and attentiveness to the coachee's experience		N / D / C
Listens with both empathy and analysis		N / D / C
Helps coachee make meaning from successes and challenges		N / D / C
Centers coachee agency and ownership		N / D / C
Helps coachee identify their own solutions		N / D / C
Uses questions that support and challenge thinking		N / D / C
Balances support and accountability		N / D / C
Demonstrates curiosity rather than judgment		N / D / C
Creates psychological safety		N / D / C
Encourages reflection and learning		N / D / C

N = Not Yet Demonstrated | D = Developing | C = Consistently Demonstrated

Common Coaching Traps

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

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		

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	☐	☐	☐

Reflective Debrief Questions for Mentor Coaches

Strengths

1. Where did the coach operate most effectively in the coaching "sweet spot"?
2. What behaviors created the most learning, reflection, or ownership?
3. What coaching strengths should be continued and strengthened?

Growth Areas

1. Which continuum does the coach tend to lean toward?
2. When did the coach become overly directive or insufficiently directive?
3. What opportunities existed to deepen reflection or increase coachee ownership?
4. What coaching moves might improve balance?

Next-Step Commitments

1. One coaching practice to continue:
2. One coaching practice to strengthen:
3. One coaching experiment before the next observation:

Observation Summary

Coach's Strengths (with Evidence)

Strengths	Evidence

Growth Opportunities (with Evidence)

Growth Opportunities	Evidence

Recommended Next Coaching Experiment

Practice to Grow	Specific Experiment	Success Indicators

Domains of Coaching, Evidence to Look For, and Indicators

Domain 1: Elicitive Coaching

Effective Practice

The coach primarily helps coachees think through challenges themselves by asking questions, while strategically offering suggestions or perspectives when useful.

Evidence to Look For

- Uses open-ended questions
- Explores thinking before providing answers
- Invites reflection on successes and challenges
- Offers suggestions sparingly and strategically
- Encourages coachee agency

Indicators

Rating	Evidence
1	Primarily gives advice and solutions
2	Often instructs rather than explores
3	Strong balance of questions and selective guidance
4	Skillfully helps coachees discover solutions while appropriately contributing expertise
5	Questions only; avoids providing useful guidance even when needed

Domain 2: Direction and Structure

Effective Practice

The coach provides enough structure to create focus while collaborating with the coachee on priorities and remaining flexible throughout the conversation.

Evidence to Look For

- Establishes purpose
- Co-creates agenda
- Checks priorities during conversation
- Adapts to emerging needs

- Maintains productive focus

Indicators

Rating	Evidence
1	Coach controls agenda entirely
2	Limited collaboration on priorities
3	Shared ownership of goals and agenda
4	Strong structure with flexibility and responsiveness
5	No structure or intentional focus

Domain 3: Transparency

Effective Practice

The coach openly shares observations and assessments while ensuring the coachee remains the primary meaning-maker.

Evidence to Look For

- Shares observations clearly
- Explains reasoning and patterns noticed
- Tests assumptions
- Invites reaction and disagreement
- Balances advocacy and inquiry

Indicators

Rating	Evidence
1	Dominates with opinions and interpretations
2	Frequently tells rather than explores
3	Shares observations while maintaining dialogue
4	Uses transparency to deepen reflection
5	Avoids sharing observations or assessments

Domain 4: Use of Experience

Effective Practice

The coach appropriately shares personal experiences, lessons learned, examples, and stories in service of the coachee's development rather than to demonstrate expertise.

Evidence to Look For

- Shares experiences selectively
- Connects stories to coachee needs
- Uses examples to illuminate options
- Avoids positioning self as expert
- Returns focus to coachee

Rating	Evidence
1	Frequently positions self as expert
2	Stories dominate learning process
3	Appropriate use of relevant experience
4	Experience deepens learning and reflection
5	Refuses to contribute experience or insight

Domain 5: Depth and Vulnerability

Effective Practice

The coach helps the coachee address immediate challenges while remaining curious about deeper patterns, assumptions, and leadership habits.

Evidence to Look For

- Explores underlying causes
- Notices recurring patterns
- Invites reflection
- Connects actions to values
- Balances depth with readiness

Rating	Evidence
1	Stays only at the surface level
2	Occasional reflection but largely task-focused
3	Appropriate balance of practical and reflective coaching
4	Helps reveal meaningful patterns and growth opportunities
5	Pushes for deeper reflection regardless of readiness

Domain 6: Connection and Task Focus

Effective Practice

The coach creates authentic human connection while maintaining accountability and accomplishing meaningful work.

Evidence to Look For

- Builds trust and rapport
- Demonstrates genuine interest
- Manages time effectively
- Maintains momentum
- Advances coaching goals

Indicators

Rating	Evidence
1	Entirely task-focused with little relationship building
2	Minimal personal connection
3	Healthy balance of relationship and results
4	Strong trust-building while maintaining accountability
5	Conversation becomes mostly social and loses focus

Online Course Listings

How to Enroll

To enroll in these courses and the others that will be coming, it is a two-step process. You must first go to https://neapartnera.learnupon.com/store and click the “Sign In” button. If you already have an account in the NEA Professional Excellence Portal, you will use the same email and password that you have used in the past. If you have never had an account, then you will be creating one. Once you are logged in, you can simply click on the course name above or search for the course name in the online catalogue.

Troubleshooting the Online Leaning System:

If you are having trouble setting up an account and logging in, try resetting your password. Also, try older emails you may have used in the past. If you absolutely can not get into the system or the course email NEAHQHelp@nea.org and cc eholmes@nea.org . In the subject line of the email type “Issues Accessing PEP Portal” and then in the body describe your issue and include a screenshot of the error or issue that you are seeing.

Opportunities for Coaches and Mentor Coaches in Campaign Lab (Visit HERE for more Offerings)

Campaign Lab: Coaching as a Leadership Practice

This is the entry point for all coaches who are new to the Campaign Lab. The focus of this course is an introduction to the campaign coaching framework we are using in the Campaign Lab. It is an overview of the 5-Step coaching cycle, the elements of coaching, and the craft of coaching. Participants will explore these and be able to apply new knowledge in four short scenarios. A certificate of 5 Contact Hours is provided upon completion.

Coaching the Campaign Planning Cycle

Are you ready to coach organizers and build winning campaigns in public schools? This course 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. It is designed to complement the Campaign Lab Guide: Coaching the Campaign Planning Cycle. You'll learn how to ask the strong 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.

Opportunities for Leads and Teams in Campaign Lab

Campaign Lab: The First Four Steps

This course equips Team Leads, Coaches, and Mentor Coaches in the Campaign Lab with the knowledge and skills to successfully navigate getting to the grant application process. Participants will learn how to establish and launch an organizing team, complete a comprehensive assessment of their local, and develop a strategic campaign plan with a concise one-page summary. Additionally, the course will guide learners in identifying a fiscal agent and obtaining a written agreement to meet grant requirements.

Building Effective Campaign Lab Leadership Teams

Are you ready to transform your union campaign team into a powerhouse of collaboration and impact? This course guides NEA Campaign Lab leads, coaches, and members, through the essential practices for building and sustaining effective leadership teams. Discover how to create a shared team purpose, establish clear roles, and develop community agreements that foster trust, accountability, and results. By the end of this course, you'll have the tools to clarify your team's goals, coordinate efforts, and harness the collective power needed for successful campaigns. This course includes a guide, slides, and video examples for you to use with your team.

Empowering Your Union: Using the Local Self-Assessment Tool

Self-Assessment is a powerful tool to help you determine how to strengthen your union from the inside out. This course will guide you through the essential practice of local union self-assessment, empowering you to identify your union's strengths, challenges, and opportunities for growth. Through supportive, practical lessons, you'll learn the value of self-assessment, explore the tool's core areas, and discover how to collaborate with your team for honest reflection. By the end, you'll be equipped to interpret your results and turn insights into actionable goals, ensuring your union continues to thrive and serve its members effectively.

Campaign Lab: Centering Equity in Your Campaign

This is the first tool in the Campaign Cycle, and it is revisited throughout the cycle. This course 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. A certificate of 3 Contact Hours is provided upon completion.

Empowering Campaigns: Applying SWOT Analysis for Strategic Action

In this 2-module course, you'll discover how to harness the power of the 8 Box SWOT analysis tool to assess your campaign's situation, clarify your strengths, and chart a path forward. This tool is an expansion of the traditional 4 Box SWOT Matrix in that it includes internal and external considerations. Through practical lessons, you'll learn to distinguish internal and external factors, conduct a focused SWOT analysis, and transform your findings into actionable scenarios for real-world organizing. By the end, you'll be equipped to lead your team with clarity, confidence, and strategic vision. This course is built using tools from Beautiful Trouble. A certificate of 3 Contact Hours is provided upon completion.

Strategic Mapping for Campaign Teams: Applying the Spectrum of Allies

The Spectrum of Allies is an analysis tool that helps you grow your campaign's power by moving just one group at a time. In this 2-Module course, you'll discover how to use the Spectrum of

Allies—a proven strategic mapping tool—to broaden support and mobilize allies for social change. Through collaborative exercises and real-world examples, you'll learn to map stakeholders, develop tailored engagement strategies, and design tactics that shift groups closer to your campaign goals. By focusing on incremental progress and strategic evaluation, you'll be empowered to lead more effective, inclusive, and resilient campaigns. A certificate of 3 Contact Hours is provided upon completion.

SMARTIE Framework for Equitable and Inclusive Campaign Goal Setting

Are your campaign goals driving real, equitable change—or just checking boxes? This course helps campaign leads, coaches, and organizers move beyond traditional goal setting by embracing the SMARTIE framework, which centers inclusion and equity alongside results. Through practical lessons, real-world examples, and hands-on activities, you'll learn to define, write, and evaluate campaign goals that are both ambitious and intentionally inclusive. By the end, you'll be ready to lead organizing campaigns that deliver meaningful outcomes for all members of your community. This module has downloadable resources for you to use with your team when setting campaign goals that are also inclusive and equity-focused.

Additional Resources

Alliance to Reclaim Our Schools (AROS)- Free the Future
https:/ /beautifultrouble.org/

https://practicalradicals.org/podcast-episodes/
Campaign Strategy Workbook

Self-Assessment Tool for Campaign Coaches

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

Coaching Across Differences

An equity-centered coaching approach asks coaches to see the person, see the system, and see the interaction between the two. That balance creates the conditions for deeper growth, stronger relationships, and more effective leadership development. This guide is designed as a guided reflection for coaches about their intersectional selves and how that can shape their coaching practice.

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Coaching Across Differences for Campaign Lab Coaches

Coaching is a core leadership skill and a critical tactic in the Campaign Lab approach to building high participation locals. Effective coaching helps leaders develop confidence, strengthen organizing skills, broaden participation, and build the capacity of others to lead. When coaches and leaders differ by race, gender, job classification, age, geography, or other dimensions of identity, coaching does not occur outside of those differences. Power, experience, credibility, and communication are often shaped by social and organizational dynamics that can influence how feedback is given, received, and acted upon. Strong coaches remain aware of these dynamics without making assumptions about another person's experience. They coach with curiosity, humility, and a commitment to understanding both individual circumstances and broader organizational realities. An equity-centered coaching approach asks coaches to see the person, see the system, and see the interaction between the two. That balance creates the conditions for deeper growth, stronger relationships, and more effective leadership development.

Key Ideas to Hold
When a coach and a leader differ by race, gender, job classification, age, sexuality, class background, geography, or another identity, the goal is not to ignore the difference nor make it the center of every conversation. The goal is to understand that difference may influence trust, credibility, communication, risk, and how feedback is received.

1. Coaching Is Never Separate From Power
The relationship is not just Coach ↔ Leader.
It is also:

- Race ↔ Race
- Gender ↔ Gender
- Staff ↔ Member
- Manager ↔ Employee
- HQ ↔ Field
- Older ↔ Younger
- Credentialed ↔ Non-credentialed

People enter coaching conversations carrying their lived experiences with power.

A useful coaching question:
"How might the power differences between us be shaping what is easy or difficult to talk about today?"
Communication and trust are influenced by race, class, gender, role seniority, and power dynamics.

2. Assume Difference Matters, But Don't Assume You Know How
Common coaching mistakes is:

Minimizing Difference

"We're all the same."

Overgeneralizing Difference

"Because you're a woman/person of color/support professional, you must experience X."
Instead:

- Stay curious
- Ask rather than assume
- Let the leader define their experience

Examples:

- "How does your identity show up in this situation?"
- "Do you think race, gender, role, or another factor is affecting what is happening?"
- "What dynamics am I not seeing?"

3. Separate Behavior From Identity, While Still Paying Attention to Identity
Strong coaches avoid two traps:

Trap A

Explaining everything through identity.

Trap B

Ignoring identity completely.

Good coaching asks:

- What happened?
- What behavior occurred?
- What systemic dynamics may also be present?

For example:
A woman leader receiving feedback about being "too direct."
A coach should explore:

- What specific behavior occurred?
- What impact did it have?
- Would a man displaying the same behavior receive similar feedback?
- How might gender assumptions be influencing interpretation?

Your own equity-integrated materials highlight how identical behaviors are often interpreted differently based on identity.

4. Watch for Credibility and "Prove-It-Again" Dynamics

Leaders from historically marginalized groups often carry additional burdens:

- Needing to demonstrate competence repeatedly
- Being scrutinized more closely
- Having expertise questioned
- Being interrupted or overlooked

A coach should help the leader:

- See the pattern clearly
- Avoid internalizing systemic problems as personal failures
- Identify what is within their control
- Develop strategies while also naming inequitable dynamics

Your materials specifically call out patterns where expertise, directness, emotion, and leadership behaviors are interpreted differently across race and gender.

5. Be Alert to Common Misreads

Several predictable misinterpretations show up repeatedly:

- Directness becomes "aggressive."
- Emotion becomes "unstable."
- Reserved behavior becomes "disengaged."
- Informal communication becomes "unprofessional."
- Relational leadership becomes "soft."

The coach's role is to help the leader evaluate:
Is this a performance issue, a communication issue, a perception issue, a bias issue, or some combination?

6. Listen for Adaptations
Sometimes what looks like a weakness is actually an adaptation.
Examples:

- Over-preparation
- Being hyper-careful
- Avoiding conflict
- Excessive deference
- Controlling details

Before coaching someone to change the behavior, ask:
"What has this behavior helped you survive, navigate, or accomplish?"

7. Create Psychological and Identity Safety
A leader should not have to choose between:

- Being authentic
- Being successful

Coaches build safety by:

- Listening before advising
- Being willing to hear difficult truths
- Acknowledging mistakes
- Inviting correction
- Naming uncertainty

One of the most powerful coaching moves is:
"I may be missing something because of my own experience. Help me understand."

8. Practice Cultural Humility Rather Than Expertise
The coach is not expected to know everything about another person's experience.
The expectation is:

- Humility
- Curiosity
- Accountability
- Learning

Rather than:
"Let me explain your experience."
Try:
"Help me understand how you're experiencing this."

9. Focus on Impact, Not Intent
Differences often create misunderstandings.
When they occur:

- Explore impact first.
- Explore intent second.

Questions:

- "What impact did that have on you?"

- "What impact do you think it had on others?"
- "What would repair look like?"

This keeps coaching grounded in learning and growth rather than blame.

10. Help Leaders Navigate Systems, Not Just Individual Behaviors

Coaching should not only ask:
"How could you do better?"
It should also ask:
"What is the system rewarding, discouraging, or making difficult?"
Examples:

- Who gets speaking time?
- Who gets stretch assignments?
- Who gets second chances?
- Whose expertise is trusted?

Your equity-centered materials consistently emphasize that coaching and leadership development happen inside systems of power, not outside them.

Three Coaching Commitments

A coach working across differences should continually commit to:

1. **Curiosity Over Assumption**
    - Ask before concluding.
2. **Impact Over Intent**
    - Explore outcomes, not just motives.
3. **Awareness Over Neutrality**
    - Acknowledge race, gender, class, and power when they matter rather than pretending they do not exist.

A simple coaching mantra is:
"See the person, see the system, and see the interaction between the two."
That balance tends to produce the deepest growth and the strongest coaching relationships

Intersectionality Wheel of Privilege: A Reflective Process for Coaches

The purpose of this activity is not to measure who is more or less privileged. Instead, it helps coaches develop greater awareness of how their identities, experiences, and relationship to power shape the way they listen, ask questions, interpret situations, and build trust with leaders. Self-awareness is a prerequisite for coaching across differences. Coaches cannot effectively navigate power dynamics with others if they have not first explored their own relationship to power and identity. To complete this, you will need to complete the Intersectionality Wheel that follows the directions and guided reflections. You will also need to plan about 60 minutes to complete the wheel and to journal through the guided reflections.

Step 1: Complete Your Intersectionality Wheel
Using the Intersectionality Wheel, identify the identities that are most relevant to how you move through the world. Examples might include:

- Race and ethnicity
- Gender identity
- Sexual orientation
- Class background
- Education
- Job classification or professional role
- Age
- Ability/disability status
- Religion or faith tradition
- Geographic background
- Language and communication style

For each section of the wheel, consider where your identity may place you closer to societal privilege, marginalization, or a combination of both.

Step 2: Identify Where You Experience Power and Where You Experience Marginalization
Review your wheel and reflect:

- In which areas do I typically receive credibility, trust, or benefit of the doubt?
- In which areas do I have to work harder to be heard, respected, or understood?
- Where do I experience both privilege and marginalization depending on the situation?

Notice that you likely experience a combination of privilege and disadvantage rather than fitting into a simple category. It is highly likely that the people you coach will also have perceptions, behaviors, and experiences informed by a similarly complicated intersectionality.

Step 3: Reflect on How Your Identities Have Shaped Your Leadership Story

- What messages did I receive growing up about leadership, authority, success, and belonging?
- Which parts of my identity have opened doors for me?
- Which parts of my identity have created barriers?
- How have these experiences shaped the way I lead, communicate, and respond to conflict?

The goal is to connect identity to lived experience rather than treating identity as an abstract concept.

Step 4: Explore How Others May Experience You
Imagine entering a room as a facilitator, organizer, or coach. And reflect:

- Before I say a word, what assumptions might others make about me?
- Which aspects of my identity may increase my perceived credibility?
- Which aspects may lead others to question my expertise or authority?
- How might different people experience me differently?

Consider how your identities influence coaching relationships whether you acknowledge them or not.

Step 5: Examine Your Coaching Defaults
Invite coaches to identify patterns:

- What behaviors tend to frustrate me?
- What leadership styles do I naturally value?
- Which communication styles feel most comfortable to me?
- Which styles are harder for me to understand or appreciate?

How might your identities and experiences have shaped these preferences?
Doing this can help you distinguish between objective observations and personal assumptions.

Step 6: Identify Potential Blind Spots
Review the wheel again and reflect:

- Which identities do I rarely think about because they are normalized in my experience?
- Where might I unintentionally assume others have experiences similar to my own?
- Whose experiences might I have difficulty understanding because I have not lived them?

The goal here is to encourage humility and curiosity rather than guilt. Empathy is the path to coaching across differences effectively.

Step 7: Connect Reflection to Coaching Practice
Ask coaches to consider upcoming coaching conversations.
For each leader they coach, reflect:

- What similarities and differences exist between us?
- How might those similarities create connection?
- How might those differences affect trust, communication, or feedback?
- What assumptions do I need to test rather than accept as true?

Step 8: Develop Equity Commitments
Complete the following statements:

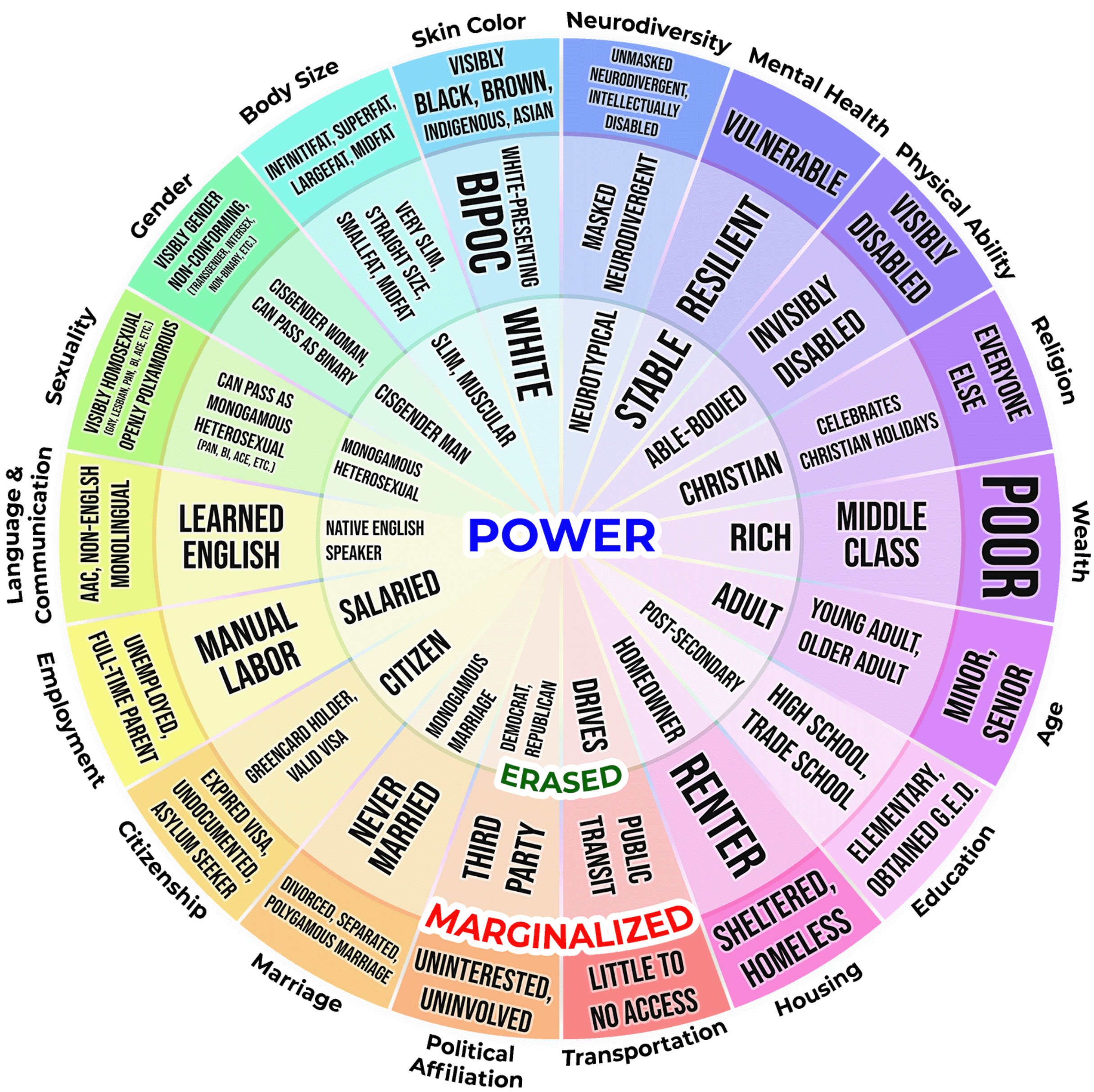
- To coach more effectively across differences, I will…
- One assumption I will actively challenge is…
- One area of my identity I want to learn more about is…
- One coaching behavior I will practice is…

Final Reflection Question

How does understanding your own intersectional identities help you better "see the person, see the system, and see the interaction between the two" when coaching others?

INTERSECTIONALITY WHEEL OF PRIVILEGE

As Observed in the USA



TessaWatkins.com/wheel-of-privilege

Adapted from Sylvia Duckworth, Canadian Council for Refugees, and Olena Hankivsky, PhD

LCN LEADING CHANGE NETWORK

TRAINING FOR CHANGE

Coaching as a Leadership Practice

Campaign Lab

"How do I enable others to find purpose in the face of challenge?"

NEA NATIONAL EDUCATION ASSOCIATION

Leading Change Network Acknowledgements and Credits

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

This guide has been developed over the course of many trainings by Liz Pallatto, Joy Cushman, Jake Waxman, Devon Anderson, Rachel Anderson, Adam Yalowitz, Kate Hilton, Lenore Palladino, New Organizing Institute staff, Leading Change Network, MoveOn Organizers, Center for Community Change staff, Jose Luis Morantes, Carlos Saavedra, Sean Thomas-Breitfeld, Shuya Ohno, Petra Falcon, Michele Rudy, Hope Wood, Josh Daneshforooz, Melanie Vant, Uyen Doan, Abel R. Cano, Voop de Vulpillieres, Ana Babovic and many others.

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Developed in partnership with *National Education Association* in support of *The Campaign Lab* coaching program. If sharing outside this partnership, please be in touch with Training for Change.

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Combined and Modified by Ellen Holmes, 2026

Coaching as Resistance

For over a century, there has been a quiet war over how we learn. In the late 1890s, industrial elites realized that if workers learned to think for themselves, the factory system would crumble. They championed the 'Banking Method' of education: teachers 'deposit' facts into students, who are expected to remain passive 'receiving objects.' This method wasn't just for children; it became the default for how we run meetings and 'train' new union members today.

But a different tradition grew in the South. At the Highlander Folk School, Myles Horton taught that the coach's job is to 'bring forth' the wisdom already in the room. Septima Clark proved this by teaching sharecroppers to read using the laws being used to oppress them. Ella Baker, the 'Fundi' (craftsperson), coached the young students of the civil rights movement not by giving speeches, but by asking the right questions. When we coach today, we are reclaiming that power

Why is coaching an important leadership practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching enables others. Organizing campaigns are rich with challenges and learning opportunities, but sometimes we are fish in our own water and we cannot see the challenges we are swimming in. Coaching in organizing helps to alleviate this problem. Coaching helps individuals to overcome motivational, strategic, and informational challenges that might otherwise hinder the progress of the individual, and/or the team, and thus the campaign or training.

What is coaching in organizing?

Coaching is a direct intervention in an individual or team's work process to help them improve their effectiveness.

Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns and trainings. Some examples of when coaching skills are necessary:

- Helping an organizer overcome motivational challenges with their volunteers
- Assisting a leadership team in creating strategy for their organizing campaign

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.

Elements of coaching

Coaching requires learning to identify a person's or team's strengths and weaknesses to help them draw upon their strengths to overcome their weaknesses. People often know what they "should" do. But fresh eyes can help diagnose specific challenges they face while identifying ways to deal with them.

- **Motivational coaching (heart)** is intended to enhance effort.
- **Educational coaching (hands)** is intended to help acquire information or skills
- **Strategic coaching (head)** is intended to help evaluate how to use resources to achieve outcomes.

Coaching Approaches

Corrective

Some coaching is aimed at helping improve poor performance (i.e., the coachee is overall not doing the leadership practice well and needs help getting up to a basic level).

Developmental

Some coaching is aimed at helping the individual achieve mastery (i.e., the coachee does the leadership practice well and is ready to become an expert). Basic elements of coaching are the same (i.e., motivational, strategic, and informational), but coaching strategies may differ (e.g., consult by asking reflective questions to develop mastery vs. consult by providing expert feedback to illustrate errors in how they are thinking about the task).

Be aware this is not coaching…

Giving advice

Since good coaching should take a coachee beyond the limitations of the, coach, leader or mentor's knowledge it makes sense that your advice shouldn't be the golden tip. The golden tip is the one that the coachee will realize on their on that is even better than any solution that you could come up with. It is essential to avoid giving advice as a coach.

Leading questions

Leading questions is basically hiding your advice in a question format. If good coaching is all about asking the right question, that doesn't mean that ending with a question mark can make you get a way with an embedded advice in the question.

Examples:

- Have you tried to do xxxxxx?
- Will xxxx work in your situation?

Essential Qualities of an Effective Campaign Coach

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"?

Coaching Styles

Campaign coaching is similar to athletic team coaching in several ways – most obviously, the "players" (your coachees) are learning campaigning skills "during the regular season" (while planning and running a live campaign). But even more than a team head coach, we campaign coaches have to switch coaching styles to match what our teams need – some days, we might be more "cheerleader" than co-strategists, or might spend more time commiserating about how difficult it can be to be a full-time educator also trying to change local policy. Coaches often have more success when we're thoughtful about the coaching styles available to us.

- **Curious Co-Conspirator** – Campaign coaches spend most of our time discovering "the right answers for right now" alongside the organizers we're coaching
- **Expert Campaigner** – And campaigning is a complex skill to learn, and we draw on our experiences to craft questions, make observations and help them see more options for handling a challenge
- **Cheerleader** – We're in charge of "noticing what's going right here" and helping them access the motivation needed to keep going to the next mile marker past challenges that emerge
- **Head Coach** – We keep them moving from "scrimmages" (planning) to "the regular season" (launching a campaign) and towards "the playoffs" (campaign escalation)
- **Supportive Peer** – We've experienced how hard it can be, and can help organizers feel less alone during tough times (and help them feel proud of every small success)

Effective Campaign Coaching Is	**Effective Campaign Coaching Is Not**
-Showing up and being present to another person's experience and listening, with both your head and heart	- Being so prepared that you figure out all the answers for the leads and teams before you even hear or observe their challenges
- Helping the leads and teams explore and make sense of their challenges and successes and what they learned from it all	- False praising of the leads and teams or only focusing on their strengths because you do not want not to hurt their feelings
- Helping the leads and teams to find solutions to challenges - centering their needs and agency in the solutions	- Solely criticizing the leads and teams for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the leads and teams what to do

Coaching Pitfalls to Avoid

Some of the most common challenges of coaching aren't unique to campaign coaching, we've adapted some of these from *The Coaching Habit*.

- **Being Too "Hands-Off" with Campaign Planning –** Campaign coaches, especially when coaching via Zoom, have a tricky challenge: We want to earn the trust of our coachees, and follow them into the organizing terrain that seems most urgent and relevant, but in many cases we have more knowledge about the essential ingredients needed to launch and sustain a strong campaign. We encourage coaches not to "hold back" if our assessment is that the "cake isn't ready to bake yet"

- **Answering the Wrong Question –** Sometimes the campaign teams we coach want to focus on a surface-level challenge that may not be the most important to explore. Asking "And what else?" or "Which of these is the most important for our campaign right now?" can help identify additional layers or help a group prioritize

- **The Small Talk Tango –** We might spend too much time catching up or "circling the problem". You can always draw attention to this dynamic: *"I feel like all of us here have more energy for 'small talk' today than usual, and I'm worried about impolitely rushing us into 'getting down to work'... What do you think might be going on today?"*

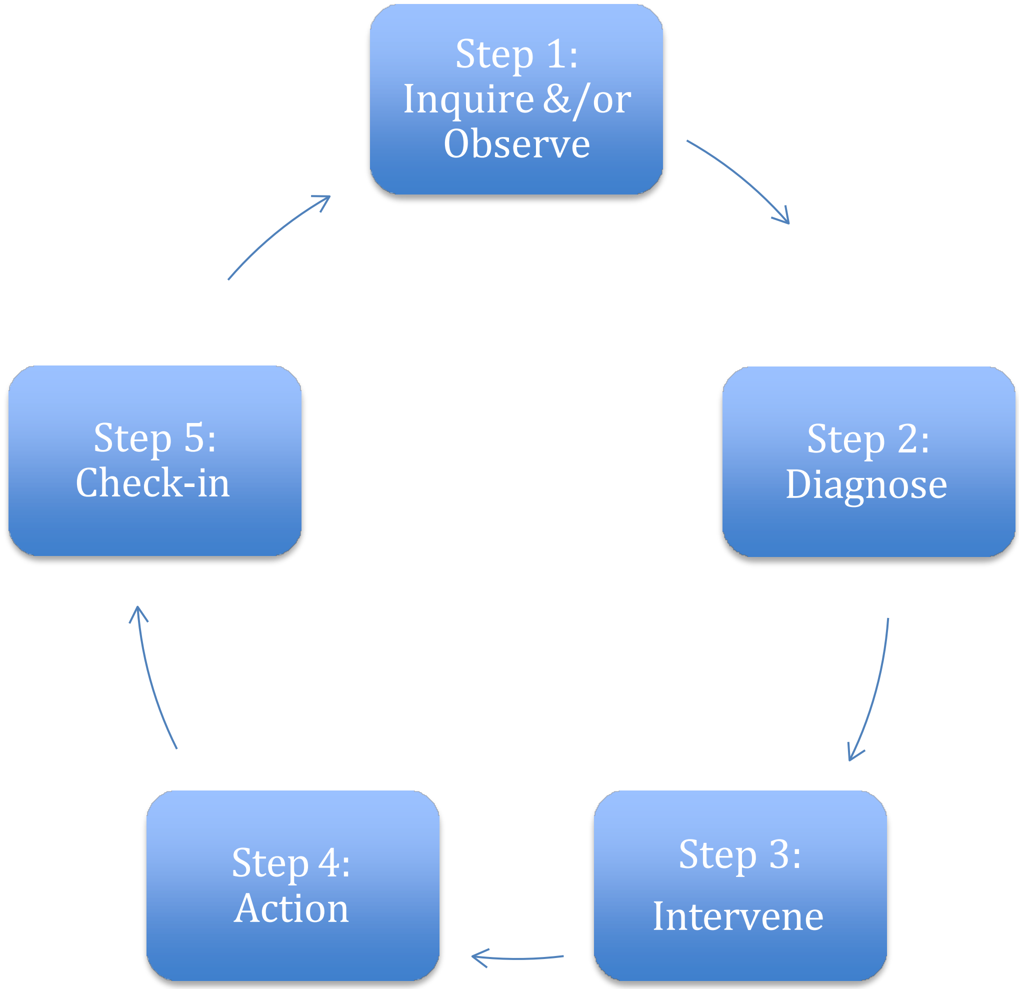
- **The Default Diagnosis –** We might have a bias as coaches or coachees towards one way of approaching a challenge, like looking for the people who might be at fault, or being too focused on the problem itself as opposed to a behavioral pattern getting in our way.

- **The Ossified Agenda –** We sometimes get stuck using the same structure for coaching sessions over and over in a way that discourages learning. We recommend "mixing up" your approach to time with coachees if it seems like they aren't developing as many insights or taking as many risks

- **Using "Advice with a Question Mark Attached" -** Questions like "Have you thought about…?", "What about…?", "Did you consider…?" aren't effective for inviting reflection and learning – they are suggestions followed by a question mark.

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

5 Step Coaching Process



1. Inquire &/or Observe - What do I see and hear?

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 <u>*stories*</u> & ask <u>*questions*</u> 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 <u>*observations*</u> 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

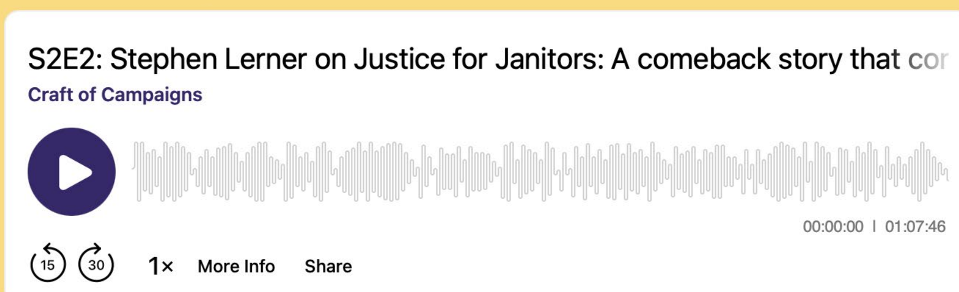
We encourage campaign coaches to periodically review stories we can bring to coaching sessions that might inspire new insights or sharpen our coachees' strategic thinking. **Here are some "cues" for searching through the stories you know:**

- 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.)

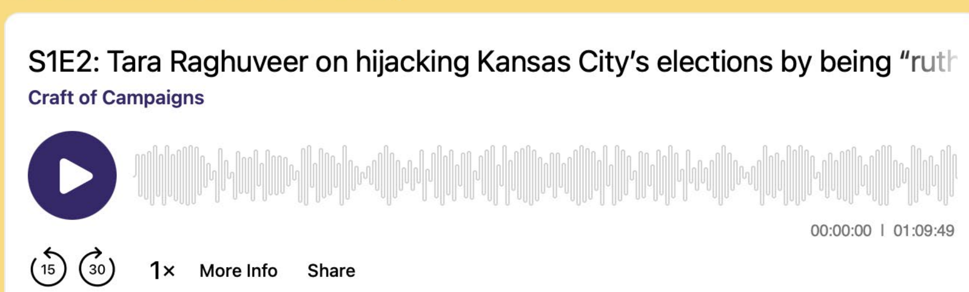
Craft of Campaigns Podcast

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



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



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.

The Craft of Coaching

The Craft of Coaching Includes the following:

- Questions vs statements
- Guideposting
- Emotional presence
- Holding authority
- Soccer vs ping pong.
- Strategy is also a fundamental element of the craft -- that is, choosing which content area you will dive in on.

Questions vs. Statements

- *Why are questions important?* – They allow the person to consider their own situation. They are engaging in reflection and the cognitive challenge of seeking solutions.
- *What do questions do for the coachee that statements can't?* – Statements are from the "other person's" perspective. They are directive and from a position of expertise. Questions allow the person to use their agency to commit to act in the process of problem solving.
- *How might you as a coach strategically use questions to your advantage?* – Coaches use questions to discover the other person's context, to help them see their role in the change they want to take, to help the person discover the resources they need. Questions keep the focus of developing power on the person and prevents the coach from becoming an actor in the change.

Guideposting

- Let's the coachee know where they are going before they get there
- Be explicit about what you are intervening on

    An example of this is saying directly, "I don't see any assessment of how you are planning to center equity within your leadership team." Then begin asking about their process and thinking around this "guidepost."

Emotional Presence

- This is the practice of the Coach modeling vulnerability in their own campaign work
- The coach holds tensions in a productive way so that learning can happen

    This might look like the coach leaning in, and pausing after an emotional response. It can sound like a coach saying simply, "I feel that with you."

Holding Authority

- Tight leadership and focus - Keep the coachee on topic and answering the question you asked them to answer.
- Your role is to challenge AND support – Be direct. You are not coaching with love if you can not be precise, succinct, and direct in your questions and assessment.
- Keep time and Interrupt Productively – Time is a matter of equity. Hold coachee and yourself to the time set for the meeting. Don't be afraid to interrupt when the coachee is wandering away from your questions or the tasks of the meeting.
- Hold coachee accountable – Leaders are accountable for their commitments.

Soccer Vs. Ping Pong

- Soccer = Group Facilitation: Engage the whole group to reflect, resonate, and coach one another.
- Ping Pong = One-on-One Deep Dive: Use focused back-and-forth to explore vulnerability or key insights with the coachee.
- Be Intentional: Use clear, purposeful questions to guide group (soccer) time effectively.

› **Balance Both**: Strategically alternate between soccer and ping pong to maximize group learning and individual growth.

Coaching Techniques

Coaching technique: Active listening

What is it?

- Pro-actively look and listen for what someone else is trying to communicate, while trying not to project our own thoughts and expectations onto them.
- Normally our understanding of a conversation is coloured by our own interpretations, experience and point of view. Our subjective view of what we've just heard might differ significantly from what the speaker wanted us to hear.
- We can come to understand how the speaker feels about a subject or situation.
- We hear through their words and tune into their underlying emotions, concerns and tensions.
- We can help the speaker formulate their thoughts and reassure them they are being listened to.
- Shows the speaker that we respect and value them and what they have to say.
- Allows us to focus on the core issues of a person's message and to understand them better as a result.

How to actively listen?

- Create a safe atmosphere for the speaker
  - Find a suitable space and deal with any distractions (turn off mobile phones, televisions, computers etc).
- Make any limits to your listening clear from the start
  - if you've only got a certain amount of time, say so.
- Show that you're listening
  - Signs of listening are
    - leaning toward the speaker
    - an interested facial expression
    - maintaining good eye contact
    - Facial gestures and small movements such as nodding our heads can show interest and support.

        - Avoid signs of impatience such as looking at your watch.
- Make the mental space
    - Don't think about what you want to say but focus on your speaker.
- Use verbal cues
    - (questioning techniques) to draw out your speaker's thoughts
- Summarise and restate what's been said.
- needs constant practice

Coaching technique: Mirroring- reflecting back

Mirroring is the technique of reflecting back the EXACT WORDS that the coachee has just said and then leaving a room for silence. Hearing someone's words in another person's voice is a good way to hear yourself and build your thoughts further. It's a very powerful coaching technique that can let the other person reach a clearer place without having to do much effort as a coach.

Coaching technique: debriefing -Summarizing & Restating

- After listening to someone we can offer them a short summary of what we've heard.
- This is a way to show that we've listened
- This is a good way to check whether we've understood them.

    How to:
    - Wait until the speaker has finished
    - Offer the summary tentatively
        - If we restate in bold terms such as: so you feel that... and we're wrong, not only do we show we haven't been listening, but we risk offending the speaker by misrepresenting them.
        - Better examples are:
    - You seem to feel that…
    - What I hear you saying is... is that right?
    - Would it be fair to say that you feel...
- Summarise succinctly
    - Boil things down into one or two short sentences.
    - This is essential if your summary is intended to clarify the situation and move a discussion on

Coaching for Performance or Learning Zones

Michael Bungay Stanier describes this tension as “coaching for performance vs. coaching for development”:

> *Coaching for performance is about addressing and fixing a specific problem or challenge. It's putting out the fire or building up the fire or banking the fire. It's everyday stuff, and it's important and necessary. Coaching for development is about turning the focus from the issue to the person dealing with the issue, the person who's managing the fire. This conversation is more rare and significantly more powerful. If I ask you to think back to a time when someone coached you in a way that stuck and made a difference, I'll bet that it was a coaching-for-development conversation. The focus was on calling you forward to learn, improve and grow, rather than on just getting something sorted out.*

When you’re coaching a “live” campaign, there may be times when it makes more sense to help a team or coachee quickly choose the best option, particularly in a high-stress moment. We think Bungay Stanier’s invitations and questions can help us navigate coaching in the “learning zone” or the “performance zone”.

Questions for Choosing “Performance Zone” or “Learning Zone”

- Is this a moment for immediate action or reflection?
- What are the consequences of failure in this situation?
- Is there time and space for experimentation?

Coaching in the Learning Zone

- Suggestion: Use more open-ended questions to promote exploration and growth.
- Example: "What possibilities do you see that we haven't considered yet?"

Coaching in the Performance Zone

- Suggestion: Provide more direct guidance and feedback when necessary.
- Example: "Based on our current constraints, I think the second approach would be most effective."

Transitioning Between Zones

- Suggestion: Develop cues or rituals to signal zone shifts.
- Example: Use specific language like "Let's enter learning mode for a moment" to indicate a zone change.

The Art of Crafting Questions

Crafting great coaching questions can take practice. We suggest preparing in advance, especially when you want to have more options for yourself to support the group through more emotionally difficult challenges. No matter how much experience we have, it can be tough to avoid giving advice based on our "gut reaction", and instead translate that into a question that might elicit learning.

Great questions…

- Are open-ended (not a 'yes-no' answer)
- Are answerable (not too complex or theoretical)
- Generate options, ideas, or insights
- Avoid being 'advice with a question mark attached' ("You should do this tactic next, don't you think?)

Example:

Coaching Challenge	**My "Gut Response"**	**A Curiosity Underneath**	**A Question I Could Ask**
Team discouraged by a negative response to their ask from a secondary target they thought would be "an easy 'yes'"	*"Why is this such a big deal? Let's move on!"*	*"Is there something I'm missing about what it means to them?"*	*"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?"*

Sample Questions for Campaign Coaching

Asking the right question can move mountains on a coaching call. Crafting great coaching questions takes practice, but it's a skill any coach can learn. It's often helpful to prepare questions in advance of a coaching session, especially when you anticipate emotional challenges or hard decisions coming up.

Effective questions are open-ended (not a 'yes-no' answer), answerable (not too complex or theoretical), and generate options, ideas, or insights of the organizer. And they avoid being 'advice with a question mark attached,' i.e. "You should do this tactic next, don't you think?"

Here are some example questions to use for your next coaching call. It's best to remix them for your particular context, and not to ask them all at once.

Open questions

- Longer reasoning or answers.
- TED:
  - Tell, Explain, Describe.
- Good for:
  - Open conversation
  - Detail.
  - Opinions, issues or experience

Closed questions

- Reduces options so as to receive a single word or very short, factual answer.
- Best avoided when a conversation is in full flow.
- Good for:
  - Check understanding.
  - Concluding i.e. a discussion.
  - Setting a frame i.e. introducing an issue.

Probing

Two step process:

1. Limiting scope
2. Asking an open question within that scope.

Funnelling

Refers to a sequence of specific questions that narrows down to a specific answer:

What, where, with whom, why, when (often with use if some closed questions). Refers to more of a sequence of questions

Appreciative inquiry

Ask questions based on people's own experience like:

- What have you experienced before that worked?
- What successes have you experienced ?
- Have you experienced a similar situation before? How was it?
- If you are to give yourself an advice, what would it be?
- From where do you get the courage and patience to continue?

Reality check

Coaching questions that helps better evaluate the situation accurately and helps see the positive side. Since often times few bad incidents can make us feel bad, and its good to have REAL sense of the problem. Also based on other historical experiences people can feel too effected or less affected about certain things.

Questions that can put numbers on challenges and measure quantitatively and not just qualitatively.

So we are talking about the challenge of X, how many incidents/ people are we talking about from how many total

Questions that can shed light on the half full of the cup to see the positive side not just the challenge to enable possibilities of solutions there:

- You are sharing the challenges when it come to X what do you consider a the success or strengths of X?

What if questions

What if questions open a light of possibility in the coachee's mind, for them to be able to see beyond the challenge. Examples:

- What if everything was possible what would you do
- What if you could make any decision, what would be your choice
- What if that xxx challenge was not there, how would things be different.

Support Questions

Questions for Sharpening Assessments

- How do you know that? What kinds 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, to pull it off?

Questions for Getting "Under the Surface"

- You mentioned a challenge your group is dealing with. Let's slow down a bit. What *else* might be going on here? What aspect might be harder to talk about, but is also there?
- 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 this 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?
- Which of these do we need to figure out before we can move on to the next step for our campaign?
- Which item do you feel most stressed about? Excited to dig in around?

Coaching the Campaigning "Windows"

Organizing teams have success timing around the "windows" when their base and potential recruits will have the most energy for campaigning. For example, campaign plans are often set in the summer and early winter, to get ready to invite active support for public actions in the early fall, late winter or the spring, and often to take advantage of openings to set local policies (e.g., when municipal budgets are set, or in advance of local primary elections). These are rules of thumb, not hard-and-fast rules – plenty of successful campaigns have operated on a different rhythm. Campaign coaches play an important role in "cheerleading" campaign teams towards launch, and in helping them plan ambitious action sequences that activate the number of supporters needed to win. For that reason we encourage coaches to set an expectation that they'll help their teams stay on schedule.

Campaign coaching can be simplified to three unique windows, with a central challenge unique to each.

- **Planning Phase** – Organizing teams struggle the most with launching on-time, to avoid missing their ideal campaign window
- **Launch Phase** – Teams have the most difficulty planning a sequence of at least three public actions, rather than one-at-at-ime
- ***(If Needed) Pivot Phase*** *– Balancing the need to keep momentum while flexibly responding to new conditions*
- **Debrief Phase** – Timing the debrief to follow a period of rest but while the campaign is still "fresh"

Key Ingredients of Issue Campaigns

Like baking a cake, we believe there are a few key ingredients to make a campaign "rise" – ready to launch, and to absorb new active supporters into public actions.

- **An engaged leadership team –** Three to ten volunteer leaders who have drafted the campaign strategy and can convincingly recruit others to participate

- **A campaign theory of change –** Also sometimes called a plan to win, this is a few sentences that describe how the group's actions will change the actions of a group of targets over a short period of time

- **One to three specific demands for one to three targets –** Nothing suppresses our campaigns as effective as too many demands for too many targets

- **A tactic sequence of at least three public actions –** Planning three actions is the surest way to ensure we build pressure, "bake-in" opportunities to recruit new supporters and develop new leaders, change the public story about our demands and create structure tests to ensure we're building the people power needed to win

Common Challenges for New Campaign Teams

We've noticed four challenges that most teams new to campaigning have difficulty navigating, and that we encourage coaches to prioritize during coaching sessions.

- **Conducting a rigorous power analysis –** Looking at our target's Pillars of Support and our own Spectrum of Support to come up with an accurate guess about what demands we have leverage to win (i.e., if we activate [these people] to [take this action] we'll get [our target] to agree to [this demand])
- **Selecting demands that hit the "sweet spot" –** They feel urgent to our base and the people we want to recruit, and they can be achieved in the next 6-12 months.
- **Designing a tactic sequence –** The strongest campaign plans sequence multiple actions over a specific time period, rather than planning one-at-a-time.
- **Picking a *posture* that matches our level of support –** Are we "cheering on" our targets to agree to our demands, because it doesn't make sense to challenge them via public pressure? Are we encouraging potential champions to come out in favor of our demands, and then challenge our targets' reelection candidacies?

Campaign Strategy Questions

Assessing Targets

- What does your target care about? What are their motivations? What do they rely on to sustain the status quo?
- What public statements have they made on our issue? What past behavior or actions have been consistent or inconsistent with these statements?
- How are similar campaigns approaching this issue elsewhere? Who are they targeting; what are they demanding, and how successful are they?
- What do their financial records tell you? E.g., donor rolls, tax information, annual reports, etc.
- What private statements or insider knowledge do you know or could you find out?
- How has your target 'felt the heat' from your organizing so far? How do you know? (If helpful, ask about what data they have, i.e.number of people at actions, number of emails/calls the target received about their demand, etc.)

Pillars of Support (Power Analysis)

- Which decision-makers could actually grant your demand(s)?
- Which people or institutions does your target count on to maintain the status quo? Who's support, participation, or endorsement is required? What key action (or inaction) is required by them?
- Who can directly influence them, and what evidence do you have of that?
- What else do they rely on or need, that you could put in jeopardy if you mobilize enough people power?

Spectrum of Support

- Which specific institutions, organizations with a constituency, or influential individuals do you need in order to win? Why are they important?
- Who is already sympathetic to your goals? How do you know? What actions could they take as a next step?
- Who is opposed to your goals? How do you know? What opposition could you 'expose,' to draw a contrast between your people/goals and theirs?Tactic Escalation
- What are examples of public actions that have "broken through" with your targets or received the kind of attention you're looking for?
- What else do we know about public actions that seem effective where you are?
- What actions have you seen in other places that might be 'remixable' for your context, to help pressure your target?
- What tactics have we seen that inspire you, that you would be excited to invite supporters to participate in?
- What are three tactics you can imagine sequencing together over 1-3 months, with the goal of demonstrating greater active support at each one over time to our targets, and greater willingness of supporters to take risks to participate?

Theory of Change

- What do you think it will take to win?
- Which specific constituencies, organizations, officials, individual "influencers" with followers do you think will have to publicly endorse your demands in order to win?
- How many people do you think you'll need to recruit "off the fence" to participate in visible, active support roles for your targets to agree to your demands?
- When might your targets be most vulnerable to our public pressure?
- What might your active supporters have to be willing to do, in order to create enough pressure to move your target?

Critical Path Analysis

- If you think about your campaign as a series of dominoes lined up to fall in your direction, which dominoes would have to fall, in what order, before your targets agrees to your demand?
    - *These might be endorsements by key secondary targets, favorable coverage in the media, public polling data, a certain number of people recruited into active support roles, a certain number of people participating in an in-person mobilization, etc.*

Sample Coaching Session Agenda

We usually don't get much time with our groups. Here's a sample 60'-90' agenda.

5-10 min	Warming Up & Checking-In
5 min	Reviewing Our Agenda & Outcomes for Today
5-10 min	Reviewing Our "Dashboard" – Where we are in this phase of the campaign, and providing any needed updates
30-60 min	Key Questions or Challenges – Key questions to "land" by the end of the meeting
1-30 min	Secondary Topics or Challenges
5-10 min	Next Steps
2-5 min	Closing – We recommend closing with a ritual, evaluation or check-in about "how this is going / what was most helpful about today"

Sample Outcomes (we recommend having fewer than five)

- Get clarity on our theory of change
- Decide which secondary target to focus on
- Pick a second tactic in our three-act tactic sequence

Prepping for Coaching Sessions

To maximize your time together we suggest spending at least twenty minutes preparing for each session. Here are some guiding questions to guide your prep:

Session Prep

Overall Assessment
- One strength the group is demonstrating, that I'd like to make sure they also notice is…
- One thing I think they need is…
- One other wish I have for them is…
- Looking back at what they told me would make this relationship a success, I also want to remember, remind them of, or check-in about…

Campaign Timeline
- A way they are "on time" on the rough campaign timeline as I see it is…
- An opportunity I hope they'll seize, that they would need to make a plan for now is…

Learning Campaigning
- An insight or skill of campaigning I think they're demonstrating is…
- A key element of campaigning or campaign strategy we're heading into, that I'd like them to get more practice unpacking, is…
- An insight I'd like them to come to is…

Session Plan

Coaching Tools – Questions, Observations, Stories, Feedback, Suggestions

Our Session Goals & Agenda
- I think we should focus most of our time on landing these one to three outcomes…
- If there's time, we should also…

Questions, Observations & Stories
- A few questions I could ask to help them reach our goals are…
- A campaign story this moment or this group reminds me of is…
- Another observation that might be helpful to this group is …

Campaign Planning Coaching Guide

Indicators
Processes
Interventions
Questions

NATIONAL EDUCATION ASSOCIATION

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)	

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	Self-Interest
• 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?	• 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 – you 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.

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 overcomes 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.

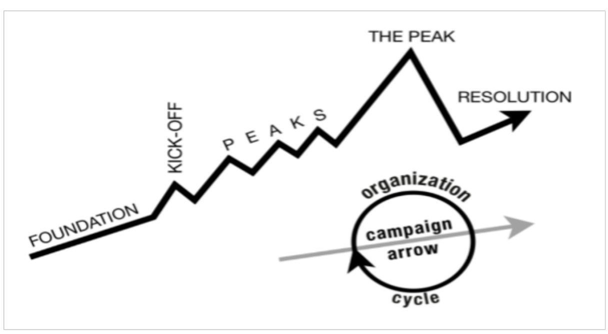
Criteria for good tactics include:

- 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

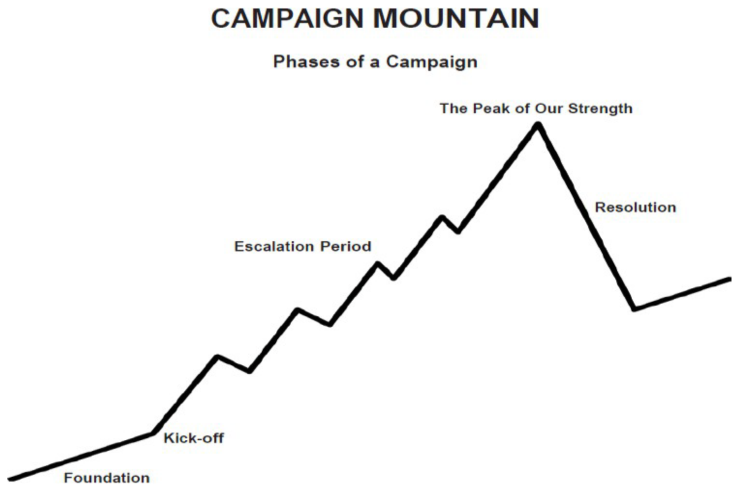
Brainstorm tactics that will put pressure on the target(s).
Name how each tactic would disrupt the target(s)'s self-interest, relationships, or power.

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 one10 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 Guide

Introduction
Assessment Tool
Scoring Process
Coaching Guide

High Participation Locals Overview

Definition and Core Foundation

High Participation Locals are unions where leadership, responsibility, organizing skills, and decision-making are broadly distributed throughout the membership rather than concentrated in a small group of officers, staff, or activists. Moving a local from a passive "servicing model" to a member-led "organizing model" is a technical craft that restructures governance, staff roles, data systems, and campaign execution.

Members are active participants in building, exercising, and sustaining collective power. Grounded in 11 core structural dimensions, a high-participation local intentionally centers equity as an everyday organizing practice—identifying and removing barriers to participation, developing diverse leadership, and ensuring all members shape the union's strategic roadmap.

The 11 Dimensions of a High-Participation Local

1. School Site Leaders & Contract Action Teams: Empowered campus representatives operate with local authority ("building swagger") in every worksite. They resolve Level 1 grievances directly with principals, map campuses, manage 10-to-1 Contract Action Teams (CATs) or Site Organizing Squads, and lead building-level governing councils.

2. The Union Staff Role: Union field staff transition from direct grievance handlers and transactional problem-solvers into strategic coaches, capacity builders, and organizers of synchronized campaigns.

3. Valley Work (Non-Bargaining Lulls): Locals utilize off-contract "valleys" as critical windows to enforce contract terms, run continuous skill-building workshops, cultivate social camaraderie, and build durable community alliances before crises strike.

4. Bargaining in High-Participation Locals: Collective bargaining is transformed into an active organizing campaign. Locals deploy massive, representative, and silent bargaining teams, reject media blackouts for radical transparency, and center demands on "common good" community issues.

5. Being a President of a High-Participation Local: Local presidents shift their focus from administrative crisis management to strategic coordination, geographic turf-walking, budget reallocation toward organizing capacity, and expanding multi-officer release teams.

6. How High-Participation Locals Use Data to Build Power: Data management shifts from passive record-keeping to active campaign tracking. Locals decentralize data entry to site leaders, utilize mobile database systems (e.g., Action Builder, OrgDB) for digital wall-charting, and measure real-time engagement.

7. How High-Participation Locals Train Their Members: Training relies on active organizing pedagogy, utilizing a "gradual release" model (moving from high-touch staff modeling to autonomous campaigns), the core "Skills to Win" curriculum, mobile site-based workshops, and intensive summer institutes.

8. Overcoming "Respectability Politics" and the Fear of Conflict: Leaders help members overcome the socialized aversion to conflict by rejecting quiet backroom handshakes and symbolic "moral victories" in favor of visible, majoritarian site actions that command real leverage.

9. Defensive Organizing & Anti-Authoritarian Protection: Permanent site-level communication trees and strike machinery are repurposed for rapid-response community defense, including ICE defense, protecting LGBTQ+ youth, and election protection.

10. The Strategic Plan—Guarding the Roadmap and Building Coherence: Unions eliminate reactive firefighting by co-creating a unified strategic plan. The president acts as gatekeeper to align all committees, budgets, and worksite visits around shared organizing goals.

11. Methodical Structure Tests: Unions deploy escalating, quantifiable workplace actions (e.g., hand petitions, button days, practice pickets, strike pledges) as mathematical "gates" to evaluate true member leverage and readiness before major campaign escalations.

Why High Participation Locals Matter Across the 11 Dimensions

- **Sustainable Union Power:** Distributing workload through a "choir model" of shared pacing prevents burnout, smooths leadership transitions, and ensures power never depends on a single officer or staff person.
- **Increased Member Ownership:** Members solve Level 1 workplace problems, chart campuses, and shape policy directly from assembly floors, transforming the union from an external service provider into an organization members run together.
- **Stronger Worksite Power:** Functional 1:10 site structures (CATs, UBCs) allow issues to be identified early and resolved directly with administrators using collective site actions.
- **Methodical Organizing Outcomes:** Combining active data tracking with structured 1:1 organizing conversations (80/20 listening rule) enables supermajority density, organic leader identification, mobile trainings, and self-directed, synchronized actions across sites.
- **Democratized Bargaining and Advocacy:** Open, representative bargaining teams and direct member updates backed by disciplined structure tests ensure locals command real leverage at the negotiating table.
- **Expanded Influence Beyond the Workplace:** Permanent community-labor alliances built around "common good" demands create mutual trust, allowing worksite networks to rapidly mobilize for community defense.

Core Beliefs of a High Participation Local

- **Success Metric:** Measured by how many members are organized, developed, connected, mapped, and prepared to exercise collective power together—not by staff problem-solving volume.
- **Equity & Access:** An everyday organizing methodology that systematically dismantles structural barriers to expand who participates, who leads, whose experiences are centered, and whose voices drive the strategic roadmap.
- **Action & Leverage:** Respectability politics and polite closed-door committee meetings are structural traps; real compliance occurs only when backed by majoritarian power and protected solidarity.

The Four Essential Outcomes of a High Participation Local

1. Supermajority Membership: Membership density reaches high thresholds (80%–90%+) reflecting every worksite, shift, department, and job classification across the bargaining unit.

2. Supermajority Participation: Members actively engage in 1:1 conversations, campaign actions, trainings, and escalating structure tests verified through active data tracking.

3. Leadership at Every Worksite: Campus representatives operate with authority ("building swagger") and confidence, managing 1:10 CAT trees and local governance bodies across all sites.

4. Equitable Access to Power & Participation: Structural barriers (meeting times, language, shift schedules) are systematically audited so all members have meaningful opportunities to contribute, lead, and shape the union's strategic roadmap.

Key Takeaway: *A high-participation local builds power through supe-majority participation, leadership through gradual-release development, and solidarity through equity. It succeeds because the local union has systematically aligned its governance, staff roles, data systems, strategic planning, and training infrastructure across all 11 core dimensions to empower everyday members to lead and exercise collective power together.*

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		

High Participation Local Self-Assessment Scoring Process

The 4-Step Self-Assessment Scoring Process

Step 1: Individual Scoring & Evidence Gathering

- **Independent Evaluation:** Each leadership team participant independently scores the local from 1 to 4 on all 11 core dimensions .
- **Evidence Mandate:** For every rating assigned, participants must cite specific concrete evidence (ex. 'We reached 80% on the staffing petition,' 'Staff still handle Level 1 grievances at 60% of schools .

Step 2: Peer Dialogue & Consensus Alignment

- **Group Comparison:** Compare individual scores across roles (ex. comparing how staff rate Dimension 2 vs. how rank-and-file building reps rate it.
- **Evidence Debrief:** Focus discussion on areas with a 2-point gap (e.g., one person scores a 2, another scores a 4). Resolve differences by examining data, wall-charts, and worksite realities.
- **Consensus Rating:** Agree upon a single baseline score (1–4) for each of the 11 dimensions for the local.

Step 3: 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.

Step 4: Strategic Roadmap Integration

- **Identify Critical Anchors:** Pinpoint the 2–3 lowest-scoring dimensions that are bottlenecking the local's power (ex. strong bargaining team but zero data charting).

- **Targeted Action Plan:** Set 90-day and 1-year benchmarks to raise those specific categories by at least one level.
- **Roadmap Alignment:** Embed these growth goals directly into the local's Strategic Roadmap ('If it's not on the plan, it's not happening').

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Step 3: Identify Organizational Strengths

Circle all categories scoring 3 (Growing) or 4 (High Participation). Discuss:

- **What are we doing well?** Which specific practices or structures created this success?
- **Systemic Roots:** What underlying systems (e.g., active wall-charts, 1:10 CAT networks, open bargaining) drove these scores?
- **Asset Leverage:** How can these high-performing assets accelerate growth in lower-scoring categories?
- **Replication:** Which specific organizing practices can be adapted across underperforming worksites or job classifications?

Step 4: Identify Priority Growth Areas

Highlight all categories scoring 1 (Servicing) or 2 (Emerging). Rather than attempting to fix everything at once, select no more than three strategic priorities:

- **Priority 1 (The Bottleneck):** The category currently placing the greatest structural limit on the local's growth (e.g., lacking site-level CATs).
- **Priority 2 (The Multiplier):** The category that will create the greatest immediate surge in member power if upgraded (e.g., shifting staff into strategic coaches).
- **Priority 3 (Campaign Catalyst):** The category most directly tied to upcoming contract negotiations or community defense campaigns.

Step 5: Analyze Foundational Capacity Drivers

Certain dimensions act as structural engines for the entire local union. When these core capacity drivers score low, progress across other dimensions becomes nearly impossible.

Weak Foundational Capacity Area	Direct Organizational Impact
Dimension 1: Site Leaders & CATs	Weak campaign execution, isolated members, and slow communication.
Dimension 2: Union Staff Role	Staff bottlenecking growth by acting as third-party problem-solvers.
Dimension 5: President's Leadership	Firefighting default; failure to guard the Strategic Roadmap.
Dimension 6: Data & Wall-Charting	Poor resource allocation, guesswork, and blind spots in member coverage.
Dimension 7: Member Training	Lack of rank-and-file confidence, leading to fear of conflict and authority.
Dimension 10: Strategic Roadmap	Constant reactive firefighting; loss of campaign coherence.

Step 6: Examine Equity Across All Dimensions

Equity is not a standalone item; it is a core organizing methodology embedded across every single assessment category. Review your scores using an intentional equity lens:

- **Who participates and who is missing?** Are night-shift custodians, ESPs, adjuncts, or rural staff participating at equal rates?
- **Who leads?** Does leadership reflect the full demographic, geographic, and occupational diversity of the membership?
- **Who benefits?** Do bargaining proposals and budget allocations address historically underrepresented groups?
- **What structural barriers exist?** Are meeting times, language access, childcare, or travel distances limiting involvement?

Step 7: Define Next-Level Incremental Actions

Organizing growth is built on deliberate step-by-step progress, not overnight perfection. Focus on moving up one level at a time:

Growth Arc: *Level 1 (Servicing) —► Level 2 (Emerging) —► Level 3 (Growing) —► Level 4 (High Participation)*

- **Moving from Level 1 to Level 2:** Ask, 'What single, low-barrier action will move us away from passive servicing toward basic member involvement?'
- **Moving from Level 2 to Level 3:** Ask, 'What formal systems (e.g., 1:10 CAT structures, regular wall-charting) must we establish to build member-driven capacity?'
- **Moving from Level 3 to Level 4:** Ask, 'How do we make this structure self-directed, sustainable, and fully embedded across every worksite?'

Part II: Interpretation Framework

Tier	Total Score	Operating Mindset & Style	Strategic Focus & Goal
Level 1: Servicing Local	**11 – 18 Pts**	'The union is a service provider.' Staff/officers solve problems; members are passive consumers.	Key Question: 'How can we help members?' Goal: Basic problem-solving.
Level 2: Emerging Local	**19 – 27 Pts**	'We need more volunteers.' Leadership wants involvement, but work stays in already activate core of people.	Key Question: 'How do we get people involved?' Goal: Event turnout.
Level 3: Growing Local	**28 – 36 Pts**	'Growth happens through organizing.' 1:10 CATs handle site issues; staff coach.	Key Question: 'How do we build power?' Goal: Developing leaders.
Level 4: High Participation	**37 – 44 Pts**	'Members ARE the union.' Supermajority participation; choir-model leadership.	Key Question: 'How do we win and transform?' Goal: Supermajority power.

Part III: The 11-Dimension Coaching Matrix

Use these targeted coaching prompts to guide leadership debriefs across each assessment dimension:

1. School Site Leaders & CATs (Dimension 1)

- **Level 1 → 2:** Do all worksites have an identified point person?
- **Level 2 → 3:** How are site leaders trained to handle Level 1 issues locally rather than calling staff?
- **Level 3 → 4:** Does every campus operate an active 1:10 CAT or Site Organizing Squad that reflects the building's full diversity?

2. Union Staff Role (Dimension 2)

- **Level 1 → 2:** What routine casework are staff performing that member leaders could learn to handle?
- **Level 2 → 3:** How are staff structurally separating individual representational servicing from field organizing?
- **Level 3 → 4:** Are staff spending 80%+ of their time coaching, training, and building long-term campaign strategy?

3. Valley Work / Non-Bargaining Lulls (Dimension 3)

- **Level 1 → 2:** Does union activity completely stop when the contract is signed?
- **Level 2 → 3:** What site enforcement, contract literacy workshops, or needs assessments occur during off-contract lulls?
- **Level 3 → 4:** How are non-bargaining periods intentionally leveraged for permanent, non-transactional community-labor alliances?

4. Collective Bargaining (Dimension 4)

- **Level 1 → 2:** Is bargaining closed-door and secret, or are members provided basic updates?
- **Level 2 → 3:** Has the local expanded its bargaining team and translated dense proposals into plain language?
- **Level 3 → 4:** Is bargaining run as an open, mass-representative campaign featuring silent observers and 'common good' demands?

5. President's Leadership & Delegation (Dimension 5)

- **Level 1 → 2:** Is the president acting as a daily crisis manager and primary grievance handler?
- **Level 2 → 3:** How is the president actively guarding the Strategic Roadmap ('If it's not on the plan, it's not happening')?
- **Level 3 → 4:** How effectively is the president delegating geographic turfs and fostering a 'choir model' of shared pacing?

6. Data Systems & Wall-Charting (Dimension 6)

- **Level 1 → 2:** Is data management purely administrative (dues tracking)?
- **Level 2 → 3:** Are site leaders logging meeting attendance, petition signatures, and member assessments?
- **Level 3 → 4:** Are leaders analyzing decentralized digital wall-charts (Action Builder/OrgDB) to evaluate campaign readiness?

7. Member Training Pipelines (Dimension 7)

- **Level 1 → 2:** Is training non-existent or limited to reading static policy documents?
- **Level 2 → 3:** Does the local offer structured skill workshops (1:1 conversations, charting) at accessible times?
- **Level 3 → 4:** Does the local operate multi-tiered pipelines ('Skills to Win', Member Organizers) using a 'gradual release' model?

8. Overcoming Respectability Politics (Dimension 8)

- **Level 1 → 2:** Does the local rely on quiet, closed-door labor-management meetings to resolve disputes?
- **Level 2 → 3:** Are worksite leaders organizing visible site actions (wear-red days, petition deliveries) to enforce rights?
- **Level 3 → 4:** Has the local actively rejected respectability traps, using 1:10 CAT networks to turn isolated fear into protected collective leverage?

9. Defensive Organizing & Anti-Authoritarian Protection (Dimension 9)

- **Level 1 → 2:** Does the local ignore community or political crises outside standard contract terms?
- **Level 2 → 3:** Does the local coordinate defense efforts with community organizations around major crises?
- **Level 3 → 4:** Has the local repurposed its site communication trees and strike machinery for rapid-response community defense (ICE defense, LGBTQ+ youth, election protection)?

10. Strategic Planning & Coherence (Dimension 10)

- **Level 1 → 2:** Is the local operating in continuous reactive firefighting mode?
- **Level 2 → 3:** Does a strategic plan guide major campaign cycles and budget reallocations?
- **Level 3 → 4:** Does a democratized Strategic Roadmap drive all operations, distinguishing structure-building from issue campaigns?

11. Methodical Structure Tests (Dimension 11)

- **Level 1 → 2:** Does the local rely on guesswork before escalating campaigns?
- **Level 2 → 3:** Are simple structure tests (button days, wear-red days) used to gauge member readiness?
- **Level 3 → 4:** Does the local deploy an escalating sequence of quantifiable tests (signed pledges, practice pickets) with strict majoritarian threshold gates (70–80%+)?

Part IV: Reflection & Organizational Action Plan

1. The Grand Coaching Question

> **Core Reflection:** *What would need to be true for twice as many members to take meaningful responsibility for the success of this union?*

2. Key Outcome Measures (Tracking Matrix)

Internal Power Measures

- **Supermajority Density:** 80%+ member density across all worksites and job classifications.
- **Supermajority Engagement:** 70%+ participation in structure tests and campaign actions.
- **CAT Coverage:** Active 1:10 member-to-leader communication trees in every building.
- **Representative Leadership:** Leaders matching member diversity across race, gender, classification, and shift.

External Power Measures

- **Durable Coalitions:** Permanent, non-transactional community-labor partnerships.
- **Common Good Bargaining:** Campaigns centered on community, racial, and economic justice demands.
- **Rapid Response:** Repurposed strike machinery capable of mobilizing rapid community defense within 48 hours.

3. Growth Snapshot (12-Month Action Plan)

Complete these four strategic statements at the conclusion of the self-assessment retreat:

1. Our greatest organizational strengths are:

2. Our most significant capacity bottlenecks are:

3. The emerging rank-and-file leaders we must intentionally develop are:

4. The three highest-impact priority actions we will execute in the next 12 months are:

- **Priority Action 1:**

- **Priority Action 2:**

- **Priority Action 3:**

Step 3: 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/CAT network; basic 1:1 training [cite: 1, 4].
19 – 27	**Tier 2: Emerging Local**	Transitioning / Hybrid Model	Implement wall-charts; launch basic structure tests [cite: 1, 4].
28 – 36	**Tier 3: Growing Local**	Organizing / Member-Driven	Decentralize training; build rapid community defense [cite: 1, 4].
37 – 44	**Tier 4: High Participation Local**	Supermajority Power Engine	Sustain choir pacing; guard strategic roadmap [cite: 1, 4].

Step 4: Strategic Roadmap Integration

- **Identify Critical Anchors:** Pinpoint the 2–3 lowest-scoring dimensions that are bottlenecking the local's power (ex. strong bargaining team but zero data charting).
- **Targeted Action Plan:** Set 90-day and 1-year benchmarks to raise those specific categories by at least one level.
- **Roadmap Alignment:** Embed these growth goals directly into the local's Strategic Roadmap ('If it's not on the plan, it's not happening').

Coaching Questions for Building a High Participation Local

The purpose of these coaching questions is not simply to improve assessment scores. The goal is to help local leaders identify how to build broader participation, stronger worksite structures, deeper leadership development, and greater collective power. A high participation local develops members, distributes responsibility, removes barriers to engagement, and creates conditions where members increasingly own the work of the union.

1. School Site Leaders & Contract Action Teams

- How are building representatives currently handling Level 1 grievances, and what training or mindset shifts are needed to help them resolve workplace issues directly with their principals rather than referring them to union staff?
- Does every school building have a functional Contract Action Team (CAT) or Site Organizing Squad operating on a 1-to-10 ratio, and how do you monitor communication coverage across grade levels and departments?
- **Equity Focus:** How intentionally are you identifying organic leaders across all job classifications, shift schedules, races, and linguistic backgrounds to ensure your building leadership reflects the full diversity of campus staff?

2. The Union Staff Role

- How much of your field staff's time is spent solving individual member issues versus coaching rank-and-file members to lead their own site campaigns?
- Which staff habits or systems currently help develop independent member leadership, and which reinforce member dependency on staff?
- What structural boundaries can you put in place—such as dedicated servicing roles versus field organizers—to protect staff capacity for long-term building organizing?
- **Equity Focus:** How are staff trained to analyze grievance trends and data through an equity lens to identify systemic workplace inequities across job titles or underrepresented groups?

3. Valley Work (Non-Bargaining Lulls)

- When a contract campaign ends, how does the local maintain site structure and redirect CATs toward local contract enforcement and daily workplace issues?
- What continuous, mobile training opportunities (such as bringing workshops directly to school lunchrooms or libraries) are offered during lulls to build ongoing rank-and-file literacy?
- **Equity Focus:** How are you utilizing non-bargaining "valleys" to invest in non-transactional, permanent alliances with local civil rights, racial justice, and immigrant rights organizations before a crisis occurs?

4. Collective Bargaining in High-Participation Locals

- What steps are you taking to reject closed-door ground rules and build radical transparency (e.g., plain-language proposals, site observer programs, post-session video debriefs)?
- How are parent, student, and community priorities integrated directly into your contract platform to fight for "common good" demands alongside standard educator needs?

- **Equity Focus:** How does your bargaining structure ensure that historically marginalized job classifications (such as ESPs, classified staff, or temporary workers) have direct, proportional representation and decision-making power at the table?

5. Being a President of a High-Participation Local

- As president, what administrative or Level 1 representational tasks can you delegate so you can focus on strategic coordination, political diplomacy, and geographic turf visits?
- How strictly are you acting as the "gatekeeper" of the strategic plan to ensure that unaligned requests or passive expenditures do not derail core organizing priorities?
- Are officers and executive board members primarily measured by what they personally accomplish, or by the new leaders they develop?
- **Equity Focus:** How are you actively disrupting historical patterns of leadership succession to mentor, recruit, and share organizational power with members from underrepresented social and job groups?

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

- How decentralized is your data collection—can building reps and CAT leads update site mapping and turnout metrics directly in real time?
- How are quantitative structure-test results evaluated as mathematical "gates" to confirm supermajority readiness before escalating to a higher-stakes action?
- **Equity Focus:** When reviewing digital wall-charts (such as Action Builder or OrgDB), how do you disaggregate participation data to spot engagement gaps across specific job titles, worksites, or demographic groups?

7. How High-Participation Locals Train Their Members

- How does your training program move leaders through a deliberate "gradual release" model—from staff co-leading early actions to rank-and-file members running fully autonomous campaigns?
- What structured, core skill-building frameworks (such as Structured Organizing Conversations and 1:1 listening rules) are standard across all leadership cohorts?
- **Equity Focus:** How do specific logistics—such as meeting times, childcare responsibilities, language accessibility, shift schedules, or transportation—affect who can access training, and what assumptions are we making about who is available to lead?

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

- Where is the local defaulting to "respectability politics"—hoping closed-door administrative meetings will solve systemic issues—rather than building visible workplace leverage?
- How do site leaders frame collective actions to ensure the local isn't settling for symbolic "moral victories," but instead forcing concrete policy or resource changes?
- **Equity Focus:** How do your 1:10 CAT networks build collective protection for vulnerable workers (such as non-tenured staff or immigrant educators) who face disproportionate retaliation when challenging authority?

9. Defensive Organizing & Anti-Authoritarian Protection

- How ready is your site-level CAT communication network to mobilize rapidly in defense of community, student, or civil rights threats outside standard contract issues?
- How is the local utilizing scenario planning or tabletop exercises with community coalition partners to prepare for broader political or legal crises?
- **Equity Focus:** What concrete rapid-response protocols (such as ICE defense networks, safe-space protections for LGBTQ+ youth, or sanctuary school policies) exist to protect the most vulnerable members of your school community?

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

- Does the local have a clear, co-created strategic plan distilled into an accessible roadmap that every leader and site rep understands?
- How clearly does your leadership team distinguish between internal structure-building campaigns (building capacity) and external issue campaigns (expending leverage)?
- What sustainable organizing systems need to be built within this strategic plan, rather than relying on the heroic effort of individual leaders?
- **Equity Focus:** How were members most impacted by structural inequities involved in co-creating the strategic plan, and how is equity used as a lens to evaluate resource allocation in that roadmap?

11. Methodical Structure Tests—Measuring Member Readiness

- What escalating sequence of structure tests (e.g., platform pledges, dress/button days, face-to-face vote commitments) do you require before moving to high-stakes escalations?
- Why does the local prioritize physical paper petitions and 1:1 face-to-face organizing conversations over passive online forms or surveys?
- **Equity Focus:** When evaluating whether a structure test meets your majoritarian threshold (e.g., 70%–80%+ active participation), how do you ensure that threshold is met across *all* job classifications and buildings, rather than driven primarily by privileged or high-density sites?

Coaching Strategic Thinking (12-Month Action Plan)

Coaches are supporting teams in the completion of these four strategic statements at the conclusion of the self-assessment retreat:

1. Our greatest organizational strengths are:

2. Our most significant capacity bottlenecks are:

3. The emerging rank-and-file leaders we must intentionally develop are:

4. The three highest-impact priority actions we will execute in the next 12 months are:

- **Priority Action 1:**

- **Priority Action 2:**

- **Priority Action 3:**