



DSEA Board Planning: From Purpose to Plan



Participant Handouts

An effective board of directors is crucial for a labor union to successfully represent its members and achieve its objectives. This requires an alignment of values and purpose that result in power building outcomes. Board members must operate within a set of shared agreements and commitments that allow them to lead boldly, struggle productively, and hold each other accountable for actions.

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Community Agreements for Our Time

Awareness and Self-Knowledge

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

Listening for Understanding

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

Being Gracious

Being kind is a vital way of bringing meaning to our own lives, as well as the lives of others. Kindness is about caring genuinely for others around you, wanting the best for them and recognizing in them the same wants, needs, aspirations and even fears that you may have. Being kind and generous allows us to communicate better with others, to be more self-compassionate and to be a positive force in other people's lives. We are gracious when we accept and genuinely work to use the pronouns that others ask us to use. Being direct and precise about your needs and thoughts is also kindness.

Staying Engaged

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

Being Open and Suspending Judgment

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

Saying "I" - tell your truth

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

Seeking Discomfort

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

Reaching Empathy

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

Expecting Non-Resolution and Non-Closure

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

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

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

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

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

The Intersection of Our Core Values and Union Values

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

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

<i>Your Personal Core Values</i>

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

<i>DSEA Believes: (Core Values)</i>
• That public education is the best way to provide opportunities for all in a democratic society; • That our members in public education and public health are our most valuable resources. It is through their empowerment and involvement that we will achieve our mission and goals; • That advocacy on behalf of our members and public education is the primary focus of our organization; and • That we build relationships based on fairness, dignity and respect.

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

DISC Personality Assessment

teamazing.com

Instructions

This assessment will help you understand your DISC personality type. For each group of four adjectives, rank them from 1 to 4 based on how much they describe you:

1 = That's me!

2 = Pretty much me

3 = A bit like me

4 = Least Like Me

Check the box next to each adjective to rank each group. Values 1-4 can only be used once per group. Don't overthink! At the end, you'll add up the scores for each DISC type to find out your DISC personality.

DISC Assessment

Group #	Adjective	1 (That's me!)	2 (Pretty much me)	3 (A bit like me)	4 (Least Like Me)
1	Charismatic	☐	☐	☐	☐
1	Assertive	☐	☐	☐	☐
1	Patient	☐	☐	☐	☐
1	Analytical	☐	☐	☐	☐
2	Enthusiastic	☐	☐	☐	☐
2	Decisive	☐	☐	☐	☐
2	Methodical	☐	☐	☐	☐
2	Supportive	☐	☐	☐	☐
3	Competitive	☐	☐	☐	☐
3	Reliable	☐	☐	☐	☐

3	Outgoing	☐	☐	☐	☐
3	Detail-oriented	☐	☐	☐	☐
4	Independent	☐	☐	☐	☐
4	Precise	☐	☐	☐	☐
4	Calm	☐	☐	☐	☐
4	Persuasive	☐	☐	☐	☐
5	Loyal	☐	☐	☐	☐
5	Sociable	☐	☐	☐	☐
5	Organized	☐	☐	☐	☐
5	Driven	☐	☐	☐	☐
6	Bold	☐	☐	☐	☐
6	Inspiring	☐	☐	☐	☐
6	Understanding	☐	☐	☐	☐
6	Systematic	☐	☐	☐	☐
7	Optimistic	☐	☐	☐	☐
7	Forceful	☐	☐	☐	☐
7	Steady	☐	☐	☐	☐
7	Exact	☐	☐	☐	☐
8	Thorough	☐	☐	☐	☐

8	Gentle	☐	☐	☐	☐
8	Talkative	☐	☐	☐	☐
8	Self-assured	☐	☐	☐	☐
9	Resolute	☐	☐	☐	☐
9	Energetic	☐	☐	☐	☐
9	Meticulous	☐	☐	☐	☐
9	Dependable	☐	☐	☐	☐
10	Reassuring	☐	☐	☐	☐
10	Friendly	☐	☐	☐	☐
10	Commanding	☐	☐	☐	☐
10	Rigorous	☐	☐	☐	☐
11	Engaging	☐	☐	☐	☐
11	Determined	☐	☐	☐	☐
11	Consistent	☐	☐	☐	☐
11	Careful	☐	☐	☐	☐
12	Trustworthy	☐	☐	☐	☐
12	Lively	☐	☐	☐	☐
12	Accurate	☐	☐	☐	☐
12	Strategic	☐	☐	☐	☐

13	Authoritative	☐	☐	☐	☐
13	Supportive	☐	☐	☐	☐
13	Outgoing	☐	☐	☐	☐
13	Structured	☐	☐	☐	☐
14	Persuasive	☐	☐	☐	☐
14	Exacting	☐	☐	☐	☐
14	Goal-oriented	☐	☐	☐	☐
14	Adaptable	☐	☐	☐	☐
15	Calm	☐	☐	☐	☐
15	Enthusiastic	☐	☐	☐	☐
15	Direct	☐	☐	☐	☐
15	Planned	☐	☐	☐	☐
16	Sociable	☐	☐	☐	☐
16	Reliable	☐	☐	☐	☐
16	Impactful	☐	☐	☐	☐
16	Systematic	☐	☐	☐	☐
17	Vibrant	☐	☐	☐	☐
17	Self-confident	☐	☐	☐	☐
17	Thorough	☐	☐	☐	☐

17	Steady	☐	☐	☐	☐
18	Consistent	☐	☐	☐	☐
18	Upbeat	☐	☐	☐	☐
18	Patient	☐	☐	☐	☐
18	Unyielding	☐	☐	☐	☐
19	Adventurous	☐	☐	☐	☐
19	Friendly	☐	☐	☐	☐
19	Disciplined	☐	☐	☐	☐
19	Motivating	☐	☐	☐	☐
20	Tenacious	☐	☐	☐	☐
20	Detailed	☐	☐	☐	☐
20	Understanding	☐	☐	☐	☐
20	Expressive	☐	☐	☐	☐
21	Loyal	☐	☐	☐	☐
21	Dynamic	☐	☐	☐	☐
21	Warm	☐	☐	☐	☐
21	Logical	☐	☐	☐	☐
22	Composed	☐	☐	☐	☐
22	Intuitive	☐	☐	☐	☐

22	Precise	☐	☐	☐	☐
22	Radiant	☐	☐	☐	☐
23	Inviting	☐	☐	☐	☐
23	Steadfast	☐	☐	☐	☐
23	Bold	☐	☐	☐	☐
23	Detailed	☐	☐	☐	☐
24	Stable	☐	☐	☐	☐
24	Lively	☐	☐	☐	☐
24	Thorough	☐	☐	☐	☐
24	Unconventional	☐	☐	☐	☐
25	Determined	☐	☐	☐	☐
25	Trusting	☐	☐	☐	☐
25	Accurate	☐	☐	☐	☐
25	Excitable	☐	☐	☐	☐
26	Driven	☐	☐	☐	☐
26	Animated	☐	☐	☐	☐
26	Reliable	☐	☐	☐	☐
26	Careful	☐	☐	☐	☐
27	Persuasive	☐	☐	☐	☐

27	Commanding	☐	☐	☐	☐
27	Adaptable	☐	☐	☐	☐
27	Methodical	☐	☐	☐	☐
28	Systematic	☐	☐	☐	☐
28	Patient	☐	☐	☐	☐
28	Enthusiastic	☐	☐	☐	☐
28	Forceful	☐	☐	☐	☐

Scoring Sheet

Add each column to determine your DISC type. The **lowest value** represents your primary DISC type. The more different the values in each column, the more distinct your DISC type. Similar values indicate a mixed type.

Scoring Example: If your answers in group #1 look like this:

Group #	Adjective	1 (That's me!)	2 (Pretty much me)	3 (A bit like me)	4 (Least Like Me)
1	Charismatic	☒	☐	☐	☐
1	Assertive	☐	☐	☒	☐
1	Patient	☐	☒	☐	☐
1	Analytical	☐	☐	☐	☒

Your Scoring would be:

Group #	Dominant	Pts.	Influential	Pts.	Steady	Pts.	Conscientious	
1	Assertive	3	Charismatic	1	Patient	2	Analytical	4

SCORING

Group #	Dominant	Pts.	Influential	Pts.	Steady	Pts.	Conscientious	
1	Assertive		Charismatic		Patient		Analytical	
2	Decisive		Enthusiastic		Supportive		Methodical	
3	Competitive		Outgoing		Reliable		Detail-oriented	

4	Independent		Persuasive		Calm		Precise	
5	Driven		Sociable		Loyal		Organized	
6	Bold		Inspiring		Understanding		Systematic	
7	Forceful		Optimistic		Steady		Exact	
8	Self-assured		Talkative		Gentle		Thorough	
9	Resolute		Energetic		Dependable		Meticulous	
10	Commanding		Friendly		Reassuring		Rigorous	
11	Determined		Engaging		Consistent		Careful	
12	Strategic		Lively		Trustworthy		Accurate	
13	Authoritative		Outgoing		Supportive		Structured	
14	Goal-oriented		Persuasive		Adaptable		Exacting	
15	Direct		Enthusiastic		Calm		Planned	
16	Impactful		Sociable		Reliable		Systematic	
17	Self-confident		Vibrant		Steady		Thorough	
18	Unyielding		Upbeat		Patient		Consistent	
19	Adventurous		Motivating		Friendly		Disciplined	
20	Tenacious		Expressive		Understanding		Detailed	
21	Dynamic		Warm		Loyal		Logical	
22	Intuitive		Radiant		Composed		Precise	
23	Bold		Inviting		Steadfast		Detailed	
24	Unconventional		Lively		Stable		Thorough	
25	Determined		Excitable		Trusting		Accurate	
26	Driven		Animated		Reliable		Careful	
27	Commanding		Persuasive		Adaptable		Methodical	
28	Forceful		Enthusiastic		Patient		Systematic	

Sum:								
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The 4 DISC Types

Remember that most people do not fit neatly into any one type. Mixed types are the norm.

Dominant

The Dominant personality type is characterized by decisiveness, assertiveness, and a focus on results. People with a dominant personality are often direct, confident, and take initiative. They are natural leaders and are not afraid to take control of a situation. In the workplace, individuals with a dominant personality type thrive in roles that require leadership, decision-making, and the ability to take charge. They are often strategic and goal-oriented, focusing on achieving results.

Influence

The Influence personality type is characterized by sociability, enthusiasm, and a focus on building relationships. People with an influential personality are often outgoing, optimistic, and enjoy interacting with others. They are natural networkers and are able to motivate and inspire those around them. In the workplace, individuals with an influential personality type excel in roles that require social skills, such as sales, marketing, and customer service. They are often creative and thrive in environments that allow them to express their ideas and build connections with others.

Steadiness

The Steadiness personality type is characterized by patience, empathy, and a focus on cooperation. People with a steady personality are often supportive, reliable, and value harmony in their relationships. They are good listeners and are able to build trust and create a sense of security in their interactions with others. In the workplace, individuals with a steady personality type excel in roles that require teamwork, empathy, and a steady hand, such as human resources, counseling, or administrative positions. They are often good at resolving conflicts and creating a positive work environment.

Conscientiousness

The Conscientiousness personality type is characterized by precision, organization, and a focus on quality. People with a conscientious personality are often detail-oriented, analytical, and value accuracy in their work. They are thorough and methodical in their approach, and they strive for excellence in everything they do. In the workplace, individuals with a conscientious personality type excel in roles that require attention to detail, such as accounting, research, or project management. They are often able to develop and adhere to processes and standards, ensuring that work is completed to the highest level of quality.

Your Style Under Stress Test

What kind of a self-monitor are you? One good way to increase your self-awareness is to explore your Style Under Stress. What do you do when talking turns tough? To find out, fill out the survey on the following pages. It'll help you see what tactics you typically revert to when caught in the midst of a crucial conversation.

Instructions: The following questions explore how you typically respond when you're in the middle of a crucial conversation. Before you begin answering, **pick a specific relationship at work**. Then answer the items as **True or False** while thinking about how you typically approach risky conversations in that relationship.

1. ____ At times I avoid situations that might bring me into contact with people I'm having problems with.
2. ____ I have put off returning phone calls or emails because I simply didn't want to deal with the person who sent them.
3. ____ Sometimes when people bring up a touch or awkward issue, I try to change the subject.
4. ____ When it comes to dealing with awkward or stressful subjects, sometimes I hold back rather than give m full and candid opinion.
5. ____ Rather than tell people exactly what I think, sometimes I rely on jokes, sarcasm, or snide remarks to let them know I'm frustrated.
6. ____ When I've got something tough to bring up, sometimes I offer weak or insincere compliments to soften the blow.
7. ____ In order to get m point across, I sometimes exaggerate my side of the argument.
8. ____ If I seem to be losing control of a conversation, I might cut people off or change the subject in order to bring it back to where I think it should be.
9. ____ When others make points that seem stupid to me, I sometimes let them know it without holding back at all.

10. ___ When I'm stunned by a comment, sometimes I say things that others might take as forceful or attacking—comments such as "Give me a break!" or "That's ridiculous!"
11. ___ Sometimes when things get heated, I move from arguing against others' points to saying things that might hurt them personally.
12. ___ If I get into a heated conversation, I've been known to be tough on the other person. In fact, the person might feel a bit insulted or hurt.
13. ___ When I'm discussing an important topic with others, sometimes I move from trying to make my points to trying to win the battle.
14. ___ In the middle of a tough conversation, I often get so caught up in arguments that I don't see how I'm coming across to others.
15. ___ When talking gets tough and I do something hurtful, I'm quick to apologize for mistakes.
16. ___ When I think about a conversation that took a bad turn, I tend to focus on what I did that was wrong rather than focus on others' mistakes.
17. ___ I'm pretty good at persuading others by helping them understand the reasoning behind my views.
18. ___ I can tell very quickly when others are holding back or feeling defensive in a conversation.
19. ___ Sometimes I decide that it's better not to give harsh feedback because I know that it's bound to cause real problems.
20. ___ When conversations aren't working, I step back from the fray, think about what's happening, and take steps to make it better.
21. ___ When others defensive because they misunderstand me. I quickly get us back on track by clarifying what I do and don't mean.
22. ___ There are some people I'm rough on because, to be honest, *in the moment* I feel like that need or deserve what I give them.

23. ___ I sometimes make absolute statements like "The fact is..." or "It's obvious that..." to be sure I get my point across.
24. ___ If others hesitate to share their views, I sincerely invite them to say what's on their mind, no matter what it is.
25. ___ I sometimes feel so frustrated or put down that I come across pretty aggressively toward the other person.
26. ___ Even when things get tense, I'm good at finding out why people are upset and getting to the root cause of the problem.
27. ___ When I find that I'm at a cross-purpose with someone, I often keep trying to win my way rather than looking for common ground.
28. ___ When things don't go well, in the heat of the moment I'm inclined to think the other person is more at fault than I am.
29. ___ After I share strong opinions, I go out of my way to invite others to share their views, particularly opposing ones.
30. ___ When others hesitate to share their views, I listen even more attentively and show more interest in their view.
31. ___ I often have problems with people failing to do what we agreed to and then the burden is on me to bring it up again.
32. ___ After conversations, I have additional problems because I have different recollections of what was discussed or agreed to.
33. ___ When trying to work out problems with others, I find we either disagree or have violated expectations about who has the final say on some issues.

Style Under Stress Score

Please fill out the score sheets in Figures 1 and 2 below. Each domain contains two or three questions. Next to the question number is either a (T) or an (F). For example, under “Masking,” question 5 on Figure 1, you’ll find a (T). This means that if you answered it true, check the box. With question 13 on Figure 2, on the other hand, you’ll find an (F). Only check that box if you answered the question false—and so on. Total the points for each category for ONLY the boxes you checked. Your Style Under Stress score (Figure 1) will show you which forms of silence or violence you turn to most often. Your Dialogue Skills score (Figure 2) is organized by concept from the resource, *Crucial Conversations*.

Silence or Violence Conversation Strategy Tendency Figure 1

Silence ☐	Violence ☐
Masking ☐ 5 (T) ☐ 6 (T)	Controlling ☐ 7 (T) ☐ 8 (T)
Avoiding ☐ 3(T) ☐ 4 (T)	Labeling ☐ 9 (T) ☐ 10 (T)
Withdrawing ☐ 1 (T) ☐ 2 (T)	Attacking ☐ 11 (T) ☐ 12 (T)

Seven Domains Figure 2

Start with Heart ☐ ☐ 13 (F) ☐ 19 (F) ☐ 25 (F)	STATE My Path ☐ ☐ 17 (T) ☐ 23 (F) ☐ 29 (T)
Learn to Look ☐ ☐ 14(F) ☐ 20 (T) ☐ 26 (T)	Explore Others' Paths ☐ ☐ 18 (T) ☐ 24 (T) ☐ 30 (T)
Make it Safe ☐ ☐ 15 (T) ☐ 21 (T) ☐ 27 (F)	Move to Action ☐ ☐ 31 (F) ☐ 32 (F) ☐ 33 (F)
Master my Stories ☐ ☐ 16 (T) ☐ 22 (F) ☐ 28 (F)	

What Your Score Means

Your silence and violence scores give you a measure of how frequently you fall into these less-than-perfect strategies. It's actually possible to score high in both. A high score (one or two checked boxes per domain) means you use this technique fairly often. It also means you're human. Most people toggle between holding back and becoming too forceful.

The seven domains in figure 2 reflect your skills in each of the corresponding seven skill chapters. If you score high (two or three boxes) in one of these domains, you're already quite skilled in this area. If you score low (zero or one), you may want to pay special attention to these chapters.

Since these scores represent how you typically behave during stressful or crucial conversations, they can change. Your score doesn't represent an inalterable character trait or a genetic propensity. It's merely a measure of your behavior—and you can change that. In fact, people who take this book seriously will practice the skills contained in each chapter and eventually they will change. And when they do, so will their lives.

Reference: Patterson, K., Grenny, J., McMillan, R., Switzler, A. (2012). Crucial Conversations: Tools for Talking When Stakes are High, 2nd ed. New York, NY: McGraw Hill.

Club to Fighting Union

	Unorganized	Club	Union	Fighting Union
Budgeting	Little or no local funding	Funding used to recognize activists or named leaders -- stipends, meals, meetings, “swag”	Funding used to recognize activists and also to reach out to members: stickers, buttons, tee shirts, picket signs.	Funding used to release activists to do work, to communicate with members, and to open opportunities to the newly active. Funding supports coalition work and social justice issues
Bargaining or Policy Setting	None or done by a single expert (UD, President)	Small group of the usual folks on the bargaining/policy/ BOD team that the president trusts. Meetings are completely run by one person.	Team represents all major job categories. Criteria is whether or not the president trusts them and they are recognized by members as leaders. Board meetings are primarily presentations and low risk decision making.	Team represents all major job categories; criteria is whether they are trusted by the members. The local uses large – or extra-large – bargaining teams. The bargaining process is open, not closed, so that members – and even community partners – can see what happens. Board meetings are learning spaces, high risk topics are discussed and challenges addressed.
Leaders and Roles	Volunteers if any A few officers, risk of vacancy	Tends to be the same small group of folks that populate other teams. Little to no risks are taken. Proliferation of titles and stipends to Presidential allies. Elections, if held, are fore drawn conclusions.	Elections are regularly held and there are sometimes contested positions. Leaders can move others to act. However, their focus is on activism and mobilizing instead of long-term organizing. Titles and roles generally tied to actual activities; if there's a treasurer, there is a budget; if there's a newsletter chair, there's actually a newsletter	Trusted and respected by members and there is a healthy election process with a number of good candidates. Leaders routinely deliver on persuading large groups to take public collective action; they actively seek other trusted and respected leaders. Leaders use their agency to take risks that result in growth. New roles are created to provide opportunities for emerging activists.
Advocacy	None, or done by staff and/or local president Used as one of the few reasons to pay dues	Few members may help with advocacy with much support from staff. Advocacy is solely viewed as a service to individual members.	Intentional identification and training of member advocates who conduct low-level meetings with support, at higher levels from staff. Most advocacy continues to be seen as a service to individuals with some understanding that protecting the work standards are in everyone’s interest.	Advocacy is primarily viewed as way to build worker solidarity and ways to exercise collective action in response to poor work standards. Issues to organize around. First question is “who else is impacted by this” to convert individual problems to collective issues.

Programs or Activities	None, or led by the union, the staff, or by union members. No ownership.	Programs for individual interest with little risk in participating. Led by one person, and focus of change is on personal practice. Emphasis on social activities for members.	Works to have leaders design and lead the programs. Focus is on change of relationship with the union from rank-and-file members to leader. Mobilizing and activism are the norms focused on traditional worker issues.	Organizing is the norm focused on the solidarity of the group and the work is to apply pressure on a system of oppression. Issues are broad and include social movement thinking.
Organizing	None beyond basics of affiliation.	Focus is primarily on membership and recruitment of new hires.	Mobilizing and activism as episodic events. Typically led by staff or leaders. Typically engages the already involved. Work is primarily internal – homogenous participation and single-issue focus.	Systemic and rigorous member to leader contact structures. There is a culture for ongoing strategic communications. Nearly every worker is in relationship with the union and understands the union affords them a place to exercise their agency. Alliances exist outside of the union and the union can run multiple issue campaigns at once.

Patterns You Use Under Stress

Here are some questions to check which styles you use under stress.

Via [Crucial Conversations: Tools for Talking When Stakes are High](#):

Style / Pattern	Checks
Masking	• <i>Rather than tell people exactly what you think, do you sometimes rely on jokes, sarcasm, or snide remarks to let them know you're frustrated?</i> • <i>When you have something tough to bring up, do you sometimes offer weak or insincere compliments to soften the blow?</i>
Avoiding	• <i>Sometimes when people bring up a touchy or awkward issue, do you try to change the subject?</i> • <i>When it comes to dealing with awkward or stressful subjects, do you sometimes hold back rather than give your full and candid opinion?</i>
Withdrawing	• <i>At times, do you avoid situations that might bring you into contact with people you are having problems with?</i> • <i>Have you put off returning phone calls or emails because you simply don't want to deal with the person who sent them?</i>
Controlling	• <i>In order to get your point across, do you sometimes exaggerate your side of the argument?</i> • <i>If you seem to be losing control of a conversation, do you cut people off or change the subject in order to bring it back to where you think it should be?</i>
Labeling	• <i>When others make points that seem stupid to you, do you sometimes let them know it without holding back at all?</i> • <i>When you're stunned by a comment, do you sometimes say things that others might take as forceful or attacking – comments such as "Give me a break!" or "That's ridiculous!" ?</i>
Attacking	• <i>Sometimes when things get heated, do you move from arguing against other's points to saying things that might hurt them personally?</i> • <i>If you get into a heated discussion, are you known to be tough on the other person. In fact, does the person feel a bit insulted or hurt?</i>

Three Theories of Change

Organizing, Mobilizing, and Advocacy

BY ELENI SCHIRMER

Why have unions gotten so weak, and how can they strengthen? In her book *No Shortcuts: Organizing for Power in the New Gilded Age* (Oxford, 2016), labor organizer and strategist Jane McAlevey argues that a major factor in labor's decline has been that unions have abandoned the work of organizing, relying instead on the more superficial methods of building power, namely mobilizing and advocacy. What are these three different methods of union strength, and what path toward power does each build?

To organize is to build mass support and strength among ordinary people. Organizing draws its power from working people's biggest strength: our numbers. Working people may or may not see themselves as activists or politically active or even in political agreement, but through organizing, they come together to act in common cause. The work of organizing is systematic and rigorous: It requires connecting with every single worker in a shop, every educator in a building, every building in a district. At its core, it asks people to understand their own agency and to make choices about how they will exercise it. The work of organizing is difficult; ordinary people are seldom confronted by their own agency nor asked to make choices that recognize their own power. As McAlevey notes in her first book, *Raising Expectations (and Raising Hell): My Decade Fighting for the Labor Movement* (Verso, 2012), a memoir of her organizing work: "In the normal course of human events, workers don't expect much from their jobs, government, or unions, because the reality is they don't get much. The job of the organizer is to fundamentally change this." The work of organizing is difficult, but as McAlevey argues, it is essential: There are no shortcuts.

Mobilizing, by contrast, activates an already-convinced membership. Mobilizing encourages those who already support a cause or a mission to take action to defend their belief—for example, by attending a protest, wearing a button, or signing a petition. Mobilizing is a very important step for building movements, but it is not the same thing as organizing. The crucial difference between mobilizing and organizing is that mobilizing relies on the actions of people who have already been brought on board; organizing is the work bringing ever more people on board, having a stake in the direction and outcomes of the actions (mobilizing can be an important component of organizing). McAlevey distinguishes mobilizing as



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relying on the participation of a “self-selecting” group—people who have chosen to participate in something due to personal preferences or beliefs, such as environmental protection groups, the ACLU, or Planned Parenthood. Organizing, by contrast, relies on “structure-based” groups, groups determined by a predefined, often structural, relationship, such as working for the same employer, living in the same housing complex, or attending the same place of worship. Membership in a structure-based group, unlike a self-selecting group, is not a result of personal

affinity. In a structure-based group, the number of possible members—and therefore people to organize—is finite and knowable: the number of workers in a firm, residents in a housing building, or members in a church, for example. Whereas mobilizing relies on participation from a self-selecting group, organizing builds high participation among all eligible individuals.

Advocacy is the work of creating change through the actions of professionals or technical experts—lobbyists, pollsters, lawyers, communication specialists, researchers. Advocacy relies on the expertise, status, and know-how of these groups of people to make change. Advocacy usually happens in a closed-door room; ordinary people play a small to nonexistent role in its efficacy. Advocacy has become a dominant strategy for unions and liberals. But its efficiency comes at a cost; it disables the masses of ordinary people who have a stake in the issues under scrutiny by advocates.

These three forms of making change do not exist in isolation; a successful campaign may very well rely on all three strategies. Yet organizing, McAlevey argues, is the most fundamental: The base of any campaign should come from its organizational capacity above all. Yet in reality, according to McAlevey, it's often the strategy most avoided or shortchanged. After all, it is often hard, slow work that requires building connections with mass numbers of people. As a result, it's often sidestepped for quicker grabs for power—mobilizing or advocating support, rather than organizing for it.

McAlevey's framework rests on a more fundamental argument about power. In an age of massive inequality, many see power as the province of the elite—the small, powerful minority who run the courts, the banks, and the media in the U.S. and around the world. From this perspective, forging change is the process of altering who occupies those powerful institutions: voting in new leaders, appointing new judges, securing better regulators who can safeguard the system with an eye toward fairness. In McAlevey's words, this belief is little more than replacing one set of elites with another, better set of elites. It relies on advocacy and, to a certain extent, mobilizing to get the job done.

Yet exclusively focusing on the undemocratic hyper-concentration of elites obscures the power of ordinary people. Ordinary people have two major forms of power: our numbers—there are more of us than them—and our ability to withhold our participation in a system that denies us fairness, dignity, and health: They need us to keep working. Organizing, especially organizing with an eye toward building strikes, activates both forms of power. Successful labor movements and social movements often use a combination of advocacy, mobilizing, and organizing. But as McAlevey argues, organizing is the most important of those tasks—yet often the most overlooked. Her work aims to bring the movement back into labor, and winning back into the movement. 📖

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	ADVOCACY	MOBILIZING	ORGANIZING
Theory of Power	Elite. Advocacy groups tend to seek one-time wins or narrow policy changes, often through courts or backroom negotiations that do not permanently alter the relations of power.	Primarily elites. Staff or activists set goals with low to medium concession costs or, more typically, set an ambitious goal and declare a win, even when the “win” has no, or only weak, enforcement provisions. Backroom, secret deal making by paid professionals is common.	Mass, inclusive, and collective. Organizing groups transform the power structure to favor constituents and diminish the power of their opposition. Specific campaigns fit into a larger power-building strategy. They prioritize power analysis, involve ordinary people in it, and decipher the often hidden relationship between economic, social, and political power. Settlement typically comes from mass negotiations with large numbers involved.
Strategy	Litigation; heavy spending on polling, advertising, and other paid media.	Campaigns, run by professional staff, or volunteer activists with no base of actual, measurable supporters, that prioritize frames and messaging over base power. Staff-selected “authentic messengers” represent the constituency to the media and policymakers, but they have little or no real say in strategy or running the campaign.	Recruitment and involvement of specific, large numbers of people whose power is derived from their ability to withdraw labor or other cooperation from those who rely on them. Majority strikes, sustained and strategic nonviolent direct action, electoral majorities. Frames matter, but the numbers involved are sufficiently compelling to create a significant earned media strategy. Mobilizing is seen as a tactic, not a strategy.
People Focus	None	Grassroots activists. People already committed to the cause, who show up over and over. When they burn out, new, also previously committed activists are recruited. And so on. Social media are over-relied on.	Organic leaders. The base is expanded through developing the skills of organic leaders who are key influencers of the constituency, and who can then, independent of staff, recruit new people never before involved. Individual, face-to-face interactions are key.

Reprinted with permission of Jane McAlevey from her book No Shortcuts: Organizing for Power in the New Gilded Age (Oxford University Press, reprint edition: April 1, 2018).

Roadmap for Becoming a Power Building Board

Step 1: Assessing Our Board Culture

Key Questions to Consider:

- Does the board have a shared understanding of their purpose (why they exist, what is expected, accountable)?
- How does the board approach decision-making (consensus-driven, majority rule, or independent authority)?
- What values drive the board's actions (e.g., transparency, innovation, risk aversion, accountability)?
- How does the board resolve conflicts (open dialogue, mediation, avoidance)?
- What communication styles are most effective (formal, informal, or adaptive)?

Step 2: Identify Core Values

Distill the insights about board culture into a set of core values that define the board's culture. These values should reflect the principles that guide decision-making, interactions, and governance.

Examples of Core Values:

- Collaboration: Prioritizing teamwork and mutual respect in discussions and decisions.
- Integrity: Ensuring transparency, ethical behavior, and accountability.
- Adaptability: Embracing change and fostering innovation.
- Diversity: Valuing diverse perspectives, skills, and experiences.

Step 3: Define a Shared Purpose

From your values, develop a clear statement for what the board is supposed to do (purpose), who will be doing it with (constituency), and what kinds of activities board members are accountable to do. This work you are accountable 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".

Example:

We share the purpose of educational justice by organizing members across Arizona to develop their capacity for collective action through coaching, training, and mentoring. These collective actions will result in the power to influence policies and practices resulting in wins that improve public school conditions for workers and students.

Step 4: Define Behavioral Agreements, Expectations, and Accountability

Translate the shared purpose and core values into behavioral agreements. These provide clarity on how directors are expected to interact, communicate, and contribute.

Examples:

- Actively listening to all perspectives during discussions.
- Speaking constructively and challenging ideas respectfully.
- Committing to thorough preparation for meetings.
- Supporting consensus-based decisions once finalized.
- What happens when one of the agreements is broken?

Step 5: Document the Culture Profile

Compile the purpose, values, and norms into a clear, actionable document that serves as a guide for current directors and a benchmark for future development.

Descriptors for an Effective Labor Union Board of Directors:

1. **Commitment to the union's mission and values:** Board members should be passionate and dedicated to the mission and objectives of the union and its members.
2. **Deep understanding of the union and the industry:** Directors need to possess a thorough understanding of the labor union's operations, the challenges and opportunities facing its members, and the industry landscape in which the union operates.
3. **Strong leadership and strategic planning:** An effective board provides strategic direction and oversight, ensuring the union's activities align with its mission and goals. This includes establishing plans and priorities, evaluating programs and services, and making decisions that impact the future of the union and its members.
4. **Diversity in skills and perspectives:** A diverse board, encompassing varied backgrounds, expertise, and experiences, contributes to well-rounded discussions and informed decision-making. This diversity should include areas such as legal, financial, communication, advocacy, and industry expertise.
5. **Strong financial oversight:** The board is responsible for ensuring the union's financial health, including reviewing budgets, safeguarding assets, and overseeing the proper use of funds.
6. **Ethical conduct and legal compliance:** Maintaining the highest ethical standards and ensuring adherence to applicable laws and regulations are essential responsibilities of the board. This includes establishing clear policies, demonstrating integrity in all actions, and fostering a culture of compliance within the union.
7. **Effective communication and collaboration:** Open and honest communication, both within the board and with the broader union membership and stakeholders, is critical for building trust and ensuring the board's effectiveness. Board members should be able to engage in constructive discussions and collaborate respectfully, even when differing opinions arise.
8. **Commitment to continuous learning and development:** Board members should proactively seek out and engage in learning opportunities to stay current on industry trends, best practices in governance, and issues relevant to the union and its members.
9. **Regular self-assessment and evaluation:** Effective boards regularly assess their own performance and that of individual directors to identify areas for improvement and ensure accountability.
10. **Engagement with stakeholders:** Boards should actively engage with the union's members, employees, and other stakeholders, seeking feedback and addressing concerns, thereby fostering a positive reputation and strong relationships.

Core Purpose Worksheet

What is the purpose of DSEA? (Mission) Why does it exist? List what you believe is expected by your members of DSEA.

Advocate for the rights and interests of members and outstanding public education for all students. (From Webpage)

What are the current PRIMARY GOALS of DSEA? What is it doing? List actual activities you know that it does.

- To increase the capacity of the local affiliates and members to effectively ADVOCATE for their needs
- To ADVOCATE and build public support necessary for a quality public education for all students
- To increase MEMBERSHIP, member commitment and involvement in activities of the union and its affiliates, and
- To maximize member involvement in the POLITICAL ACTION process in order to impact policy and laws for the benefit of our members
- To increase the capacity of our human resource, fiscal and communication SYSTEMS
- To utilize the best TECHNOLOGY available to collect and share information that will enable effective decision-making.

What is your purpose as member of the Board? (Mission) Why does your position exist? List what you think are your expectations.

What are your PRIMARY GOALS as a Board Member? What are you doing? List actual activities you do.

**How are you, as a member of the Board actively supporting the PRIMARY GOALS of DSEA?
List the specific activities you do as a board member that specifically connect with an**

Organizational Purpose:

(FROM BYLAWS)

The DSEA shall protect and extend the humane and professional rights of its members and promote excellence in education for the children and youth of Delaware.

Purpose of the Executive Board:

(From Executive Board Job Description)

The Executive Board shall (1) conduct the business of the association; (2) shall be the interim policy-making body; and (3) shall interpret the policy of the DSEA Representative Assembly. In addition to responsibilities outlined in the DSEA Bylaws the Board shall:

Purpose Continued

(From INDIVIDUAL EXECUTIVE BOARD MEMBER Job Description)

- I. Serve as liaison between the DSEA and local associations to:
 - a. foster the implementation of key DSEA Association programs, including membership and Legislative/Political Action
 - b. present and represent Executive Board actions
 - c. convey concerns from locals to the Executive Board
- II. Attend all meetings
 - a. regular and special Executive Board meetings
 - b. DSEA Representative Assembly as a Board delegate
 - c. Board training sessions
 - d. Legislative Program Adoption
 - e. Other association functions as assigned by the President
- III. Serve as the DSEA Representative in legislative and/or political activities, such as:
 - a. Lobbying in a manner consistent with DSEA legislative priorities as outlined in the Legislative Guiding Principles and if not requested to do so provide DSEA with notice of the intent to lobby.
 - b. participating in the DSEA endorsed campaigns
 - c. participation in and encouraging others to contribute to the NEA/DSEA Fund for Children and Public Education
- IV. Serve in other official capacities as appointed by the President, such as:
 - a. DSEA operational and programmatic work groups
 - b. Department of Education (and other outside organizations)
 - c. NEA assignments
 - d. others as need arises

Purpose Continued

(From Bylaws, DUTIES).

The Executive Board shall have the authority and responsibility to:

1. Set its meetings except as otherwise herein provided.
2. Determine the eligibility of all groups wishing to affiliate with DSEA and shall have the power to suspend or revoke affiliation for violations of these Bylaws.
3. Provide for due process for members of DSEA.
4. Incorporate the Association as the Delaware State Education Association, Inc., a non-profit corporation for the purpose of conducting activities herein described and of owning real property, and the officers and Executive Board members of the DSEA shall be the officers and directors of DSEA, Inc.
5. Determine the guidelines for the election of DSEA Officers, Executive Board and NEA delegates consistent with DSEA Bylaws.
6. Serve as the Appropriations Task Force with authority to recommend a budget to the Representative Assembly for adoption.
7. Make contingency expenditures when they have not been budgeted.
8. Serve as the Advocacy Fund Executive Board.
9. Serve as direct link between state and local associations.
10. Approve Executive Director/Professional Staff appointments and contracts with DSEASO. Approval requires a 3/5 vote of the Board.

Walk the Line with Union Values

Calling People In Not Out

Calling people in means trying to create a culture and community that people actually want to be a part of. Calling people in means we don't shame or blame. It requires direct, specific and compassionate communication with one another. We all have space to grow, and calling people in is how we support one another through growth.

STATEMENT: Our affiliate calls one another in when we need to communicate within our affiliate and with other white people.

Accountability through Collective Action

Collective actions means that we look to build a movement of millions of people. Individual transformation is not enough. This is done through building accountability relationships with people of color who are doing racial justice work in the movement and who are accountable to a group of people. We don't wait to be asked to take action to organize white people.

STATEMENT: Our affiliate is taking accountable collective action on a regular basis.

Taking risks, making mistakes, learn, and keep going.

Making mistakes is part of life, and we know we have to be outside of our comfort zones in order to make change. Even when we take on real risk, we know that the risk is always greater for people of color. When we make mistakes, we want to reflect and stay in motion. We cannot let making mistakes prevent us from continuing our work. When others make mistakes, we do not shame, blame or exile.

STATEMENT: Our affiliate stays in the process of taking action, receiving feedback and staying in motion. We support one another through our mistakes.

Mutual Interest

Racial justice isn't something we help people of color with. The system of white supremacy harms all of us—including white people, though in very different ways than people of color. We need to get clear with ourselves about what we have to gain through this fight.

STATEMENT: Our affiliate and members are clear on our mutual interest. We've spent time getting clear on what's at stake for us as individuals and as a group.

Enough for All

There are enough resources in the world for everyone's basic needs to be met— for folks to have decent housing, enough food, safety, etc. The problem isn't that we don't have enough stuff—it's that it's distributed unfairly. White supremacy tells us we need to compete with everyone, even other people doing this work.

STATEMENT: We organize from a place of abundance and cooperation.

Growing is Good

We need millions of white people to join the movement for racial justice, and in order for this to happen our groups need to keep growing. We need to constantly bring in new voices and leaders. This means more than inviting people to come to meetings. It means finding new and exciting ways to bring people into the work based on their skills.

STATEMENT: Our group is open to growth. We bring in new members and engage with them as leaders.

Developing Shared Expectations and Agreements

Review the sample community agreements below. Review your agreements on the next page. What is missing that would support your ability to achieve your purpose and uphold your values?

Decision-making: <i>What is the process by which we will make decisions?</i>	
• Majority rules: Whatever gets the most votes wins. • Consensus: Everyone must agree. • Delegation: Nominate one or two people on your team to be the ultimate decision-makers. ◦ Coin flip: Leave the decision to fate! ◦ Other:	
Discussion and Decision-making: <i>How we will discuss options and reach decisions as a team to ensure vigorous input and debate?</i>	
<u>Always Do</u> Engage in open, honest debate Ask open-ended questions Balance advocacy with inquiry	<u>Never Do</u> Engage in personal attacks Fail to listen to what others say Jump to conclusions
Meeting Management: <i>How will we manage meetings to respect each other's time?</i>	
<u>Always Do</u> Start on time; stay on time Be fully present throughout the meeting	<u>Never Do</u> Come to meetings unprepared Answer cell phones or do email
Accountability: <i>How we will delegate responsibilities for actions and activities? How will we follow through on commitments?</i>	
<u>Always Do</u> Clarify understanding Provide follow-up on action items Ask for/offer support when there is a need Weekly check-in	<u>Never Do</u> Assume you have agreement Assume tasks are getting done Commit to a task that you know you won't do
How will you "self-correct" if agreements are not followed? Be sure to include how you will self-correct if a particular agreement is broken. (If you are not accountable, the default agreement is nothing is expected of us.)	
Teams work best when you have a regular, reliable time to coordinate together. What will your team's regular meeting time and place be?	

DSEA SHARED AGREEMENTS

- Respect for all members
- Work for the greater good
- Create a Brave Space and Safe Space
- Listen to understand – NOT to respond
- Step up or Step back in Conversations
- Assume positive intent from individuals
- Seek to understand the actions and words from others

How do these agreements support your ability in carrying out your purposes? Those of the organization?

How do these agreements align with your core values? Those of the organization?

How are you held accountable to these agreements? Your purpose? Your core values?

Board Plan: Monthly Actions

Month	All Current Actions	Stop Doing	Start Doing
August			
September			
October			
November			
December			
January			
February			
March			
April			
May			
June			
July			

Personal Plan: Monthly Actions and Indicators

Month	Actions and Alignment	Outcomes
August		
September		
October		
November		
December		
January		
February		
March		
April		
May		
June		
July		