

Theory of Change and Organizing Statement Worksheet

Who are our people?	What are your people's big issues? And How do YOU know?	What is the change that they want to see?	Do our people have common interests?
Theory of change (this is a warm up to help get your team moving towards the ultimate outcome format below) If we (DO SOMETHING) With (Who we organize) then (HOPEFUL CHANGE WIN) If we with then Organizing statement (this format below should be your team's outcome) We are Organizing (OUR PEOPLE) that have a shared purpose (WHY ARE OUR PEOPLE INTERESTED) to (DO SOMETHING) so that (HOPEFUL CHANGE WIN) by (WHAT DATE) We are organizing that believe to so that by			
Are there partners, competitors or enemies around this change?	What resources do they have that can help them realize this change?	What structures, opportunities, tactics, and strategies can you use?	

Plan Out Your Tactics

Tactic This is your action. Note: is this for solidarity or for escalation.	
Objective What do you hope to achieve?	
Target Who are you wanting to target or move?	
Lead Who in your union will oversee this tactic? Is there a co-lead?	
When Day/time?	
Where What's your location? Do you need to get permission? Are there regulations?	
Turnout Goal How many will participate? How will you confirm attendance prior? How will you check to see who participated the day of?	
Did It Work How will you know if you were successful? What's your plan to debrief?	

Good Tactics

A good tactic in an organizing campaign is one that is specific, achievable, and leverages the strengths of the group while disrupting the target and building support. It should be well-defined, measurable, and focused on achieving a clear goal, while also being within the group's capacity and experience. Crucially, a good tactic should also be strategic, meaning it should move the campaign closer to its overall objectives and build momentum for further action.

Here's a more detailed breakdown:

Key Characteristics of a Good Tactic:

- **Specific, Achievable, and Measurable (SAM):** A good tactic has a clear objective that is realistic and can be evaluated to determine success or failure.
- **Disruptive:** It should challenge the status quo, create discomfort for the target, and draw attention to the issue.
- **Leverages Strengths:** It should capitalize on the group's skills, resources, and experience while potentially exploiting weaknesses in the target's position.
- **Builds Support:** It should engage and mobilize the group's base, attract new supporters, and potentially sway public opinion.
- **Strategic:** It should be part of a larger plan and contribute to the overall campaign goals.
- **Non-violent and Well-coordinated:** Tactics should be safe and well-organized to maximize their impact and minimize risks.
- **Reflects Constraints:** It should be realistic given the group's resources, time, and capacity.
- **Engaging:** People should be motivated to participate and find the tactic meaningful.
- **Communicates the Problem Simply:** The tactic should clearly convey the issue at hand to a wider audience.
- **Escalation Strategy:** It should be part of a plan for increasing pressure on the target over time.

Examples of Tactics:

- **Direct Action:** Protests, strikes, boycotts, civil disobedience.
- **Building Alternatives:** Creating community resources and support networks.
- **Public Awareness Campaigns:** Educating the public through various media.
- **Lobbying and Advocacy:** Influencing decision-makers through direct communication.
- **Community Organizing:** Engaging with stakeholders and building consensus.

In essence, a good tactic in an organizing campaign is one that is well-planned, strategically chosen, and effectively executed to achieve a specific goal while building power and momentum for the broader movement.



CHECKLIST: CHOOSE TACTICS THAT FIT

- Does the action relate to your issue?
- Will it increase the pressure on the decision-maker?
- Is it simple?
- Is it visible?
- Is it timed for effect?
- Is it new and different—or tried and true?
- Are enough people ready to do it?
- How will others react?
- Will it unify people?
- How will management react?
- Could it backfire?
- Does it violate the law or the contract?
- If so, are you prepared for the consequences?
- Will it be fun?



Sample Tactics⁵ — To be used by a local union or a regional or statewide campaign with localized actions.

Basic	Moderate	Advanced
➤ Coordinated buttons in the worksite or armbands (cheaper option) ➤ Hand out information at school events ➤ Sign employee petitions ➤ Coordinated visibility (clothing, union shirts, signs in cars or classrooms, etc.) ➤ Basic education with members on bargaining process and unsettled issues via 10 minute meetings, smart and concise written communications, short videos, etc. ➤ #RedforEd Days to repeat coordinated actions and use the color of red – national solidarity color for educators ➤ Regular worksite meetings that are well publicized ➤ Request financial information from employer or state on budget, management salaries and benefits, outside lawyers, etc. ➤ Membership drive to build member density ➤ One on one campaigns to assess member readiness and educate/agitate members to take action ➤ Small member delegations to board meetings or legislative committees to speak to the outstanding issues ➤ Phone bank members and other bargaining unit members to address questions and educate/agitate for solidarity ➤ Power map board members or key regional or state leaders and community to understand their interests and pressure points ➤ Coordinate member postcards or letters to targets (publish their contact information) ➤ Use the #RedForEd hashtag ➤ Encourage members to share photos of actions on their social media platforms	➤ Solidarity buttons in the community ➤ Create songs about our issue ➤ Informational picketing as large groups in public or at specific events with the employer such as bargaining or board meetings, including a “gauntlet” style layout where the employer must walk past members ➤ Votes of no confidence in the employer/decision-maker ➤ Votes of confidence in the union bargaining team ➤ Phone bank and letters to community members and parents to educate/agitate around the issues ➤ Phone bank and letters to fellow NEA members in area who do not work for the employer, other unions and ally organizations. ➤ Flood board members home mailboxes with postcards – one per member with a unified message ➤ Encourage community members to write messages to board members ➤ ArtBuild ➤ Picket sign creation ➤ Hold more frequent press conferences and press worthy events (highly visible activities) ➤ Create a community e-newsletter to send updates ➤ Organize coffee klatches ➤ Post lawn signs in the community ➤ Place ads in the school athletic programs and parent newsletters ➤ Keep track of the employer’s spending on anti-union activities, outside lawyers, etc. and make it public. ➤ Go door to door with leaflets in the community ➤ Consider a boycott of key businesses owned by board members or supporting management. ➤ Larger delegations of members at board members ➤ Organize building-based solidarity events such as walk-ins before work begins ➤ Create a community petition and/or pledge cards ➤ Create community flyers and share them at supportive businesses (on counter) or leaflet popular community events such as farmers’ markets, recycling centers, etc. ➤ Launch social media channels and post regularly to update the community ➤ Put floats in local parades sponsored by the union ➤ Hold press conferences ➤ Create shareable social media graphics ➤ Leaflet large school events like athletic games ➤ Set up informational booths at local events such as fairs, farmers markets, etc. (“truth booths”) ➤ Launch a landing page website ➤ Meet with community organizations with an interest in students ➤ Encourage other unions in the area to picket and act in solidarity ➤ Consider work-to-rule tactics that impact management, but not students. These tactics include leaving or arriving at work when the day begins, resigning from voluntary committees, passive participation in faculty/staff meetings, etc.	➤ Large community or regional or state rallies ➤ Organize and participate in parades ➤ Organize a speakers’ bureau to go to community events ➤ Marches on the employer/decision makers ➤ Occupying a decision-maker meeting ➤ Member and community delegations to speak at board meetings ➤ Show collective resistance at staff meetings through passive participation ➤ Pack up personal property from classrooms and offices ➤ Picket board members’ houses/work ➤ Organize coordinated walk-ins on the same day across a region ➤ Banner drops ➤ Civil disobedience (be sure to consult with your union’s legal counsel) ➤ Take over board meetings ➤ Hold “sleep ins” during bargaining sessions ➤ Hold large membership rally prior to school board meeting, then pack the room ➤ Attend critical bargaining meetings such as mediation or fact finding hearings and make sure board members see/hear us ➤ Find and open a strike HQ ➤ Hold a strike informational meeting for potential striking unit and other employees potentially impacted by a strike ➤ Train picket captains ➤ Ask athletic coaches to suspend games and work if there is a strike ➤ Reach out to area colleges to ask student teachers not to come to work if there is a strike ➤ Phonebank area substitutes to ask them not to take work at the school in the event of a strike ➤ Hold a strike authorization vote ➤ Hold community forums in-person or virtual town halls ➤ Hold neighborhood based meetings with parents and concerned community members ➤ Translate community outreach materials and go to communities with translators to meet with non-English speaking communities ➤ Work with community organizations to develop proactive plans to support vulnerable students in the event of a strike ➤ Consider a Facebook live to update the community on actions.

⁵ See Tactics Manual WEAC.doc in resource section.

THE METHODS OF NONVIOLENT PROTEST AND PERSUASION**Formal Statements**

1. Public Speeches
2. Letters of opposition or support
3. Declarations by organizations and institutions
4. Signed public statements
5. Declarations of indictment and intention
6. Group or mass petitions

Communications with a Wider Audience

7. Slogans, caricatures, and symbols
8. Banners, posters, displayed communications
9. Leaflets, pamphlets, and books
10. Newspapers and journals
11. Records, radio, and television
12. Skywriting and earthwriting

Group Representations

13. Deputations
14. Mock awards
15. Group lobbying
16. Picketing
17. Mock elections

Symbolic Public Acts

18. Displays of flags and symbolic colors
19. Wearing of symbols
20. Prayer and worship
21. Delivering symbolic objects
22. Protest disrobings
23. Destruction of own property
24. Symbolic lights
25. Displays of portraits
26. Paint as protest
27. New signs and names
28. Symbolic sounds
29. Symbolic reclamations
30. Rude gestures

Pressures on Individuals

31. "Haunting" officials
32. Taunting officials
33. Fraternization
34. Vigils

Drama and Music

35. Humorous skits and pranks
36. Performances of plays and music
37. Singing

Processions

38. Marches
39. Parades
40. Religious processions
41. Pilgrimages
42. Motorcades

Honoring the Dead

43. Political mourning
44. Mock funerals
45. Demonstrative funerals
46. Homage at burial places

Public Assemblies

47. Assemblies of protest or support
48. Protest meetings
49. Camouflaged meetings of protest
50. Teach-ins

Withdrawal and Renunciation

51. Walk-outs
52. Silence
53. Renouncing honors
54. Turning one's back

THE METHODS OF SOCIAL NONCOOPERATION**Ostracism of Persons**

55. Social boycott
56. Selective social boycott
57. Lysistratic nonaction
58. Excommunication
59. Interdict

Noncooperation with Social Events, Customs, and Institutions

60. Suspension of social and sports activities
61. Boycott of social affairs
62. Student strike
63. Social disobedience
64. Withdrawal from social institutions

Withdrawal from the Social System

65. Stay-at-home
66. Total personal noncooperation
67. "Flight" of workers
68. Sanctuary
69. Collective disappearance
70. Protest emigration (*hijrat*)

THE METHODS OF ECONOMIC**NONCOOPERATION: ECONOMIC BOYCOTTS****Actions by Consumers**

71. Consumers' boycott
72. Nonconsumption of boycotted goods
73. Policy of austerity
74. Rent withholding
75. Refusal to rent
76. National consumers' boycott
77. International consumers' boycott

Action by Workers and Producers

78. Workmen's boycott
79. Producers' boycott

Action by Middlemen

80. Suppliers' and handlers' boycott

Action by Owners and Management

81. Traders' boycott
82. Refusal to let or sell property
83. Lockout
84. Refusal of industrial assistance
85. Merchants' "general strike"

Action by Holders of Financial Resources

86. Withdrawal of bank deposits
87. Refusal to pay fees, dues, and assessments
88. Refusal to pay debts or interest
89. Severance of funds and credit
90. Revenue refusal
91. Refusal of a government's money

Action by Governments

92. Domestic embargo
93. Blacklisting of traders
94. International sellers' embargo
95. International buyers' embargo
96. International trade embargo

THE METHODS OF ECONOMIC**NONCOOPERATION: THE STRIKE****Symbolic Strikes**

97. Protest strike
98. Quickie walkout (lightning strike)

Agricultural Strikes

99. Peasant strike
100. Farm Workers' strike

Strikes by Special Groups

- 101. Refusal of impressed labor
- 102. Prisoners' strike
- 103. Craft strike
- 104. Professional strike

Ordinary Industrial Strikes

- 105. Establishment strike
- 106. Industry strike
- 107. Sympathetic strike

Restricted Strikes

- 108. Detailed strike
- 109. Bumper strike
- 110. Slowdown strike
- 111. Working-to-rule strike
- 112. Reporting "sick" (sick-in)
- 113. Strike by resignation
- 114. Limited strike
- 115. Selective strike

Multi-Industry Strikes

- 116. Generalized strike
- 117. General strike

Combination of Strikes and Economic Closures

- 118. Hartal
- 119. Economic shutdown

THE METHODS OF POLITICAL NONCOOPERATION

Rejection of Authority

- 120. Withholding or withdrawal of allegiance
- 121. Refusal of public support
- 122. Literature and speeches advocating resistance

Citizens' Noncooperation with Government

- 123. Boycott of legislative bodies
- 124. Boycott of elections
- 125. Boycott of government employment and positions
- 126. Boycott of government depts., agencies, and other bodies
- 127. Withdrawal from government educational institutions
- 128. Boycott of government-supported organizations
- 129. Refusal of assistance to enforcement agents
- 130. Removal of own signs and placemarks
- 131. Refusal to accept appointed officials
- 132. Refusal to dissolve existing institutions

Citizens' Alternatives to Obedience

- 133. Reluctant and slow compliance
- 134. Nonobedience in absence of direct supervision
- 135. Popular nonobedience
- 136. Disguised disobedience
- 137. Refusal of an assemblage or meeting to disperse
- 138. Sitdown
- 139. Noncooperation with conscription and deportation
- 140. Hiding, escape, and false identities
- 141. Civil disobedience of "illegitimate" laws

Action by Government Personnel

- 142. Selective refusal of assistance by government aides
- 143. Blocking of lines of command and information
- 144. Stalling and obstruction
- 145. General administrative noncooperation
- 146. Judicial noncooperation
- 147. Deliberate inefficiency and selective noncooperation by enforcement agents
- 148. Mutiny

Domestic Governmental Action

- 149. Quasi-legal evasions and delays
- 150. Noncooperation by constituent governmental units

International Governmental Action

- 151. Changes in diplomatic and other representations
- 152. Delay and cancellation of diplomatic events
- 153. Withholding of diplomatic recognition

- 154. Severance of diplomatic relations
- 155. Withdrawal from international organizations
- 156. Refusal of membership in international bodies
- 157. Expulsion from international organizations

THE METHODS OF NONVIOLENT INTERVENTION

Psychological Intervention

- 158. Self-exposure to the elements
- 159. The fast
 - a) Fast of moral pressure
 - b) Hunger strike
 - c) Satyagrahic fast
- 160. Reverse trial
- 161. Nonviolent harassment

Physical Intervention

- 162. Sit-in
- 163. Stand-in
- 164. Ride-in
- 165. Wade-in
- 166. Mill-in
- 167. Pray-in
- 168. Nonviolent raids
- 169. Nonviolent air raids
- 170. Nonviolent invasion
- 171. Nonviolent interjection
- 172. Nonviolent obstruction
- 173. Nonviolent occupation

Social Intervention

- 174. Establishing new social patterns
- 175. Overloading of facilities
- 176. Stall-in
- 177. Speak-in
- 178. Guerrilla theater
- 179. Alternative social institutions
- 180. Alternative communication system

Economic Intervention

- 181. Reverse strike
- 182. Stay-in strike
- 183. Nonviolent land seizure
- 184. Defiance of blockades
- 185. Politically motivated counterfeiting
- 186. Preclusive purchasing
- 187. Seizure of assets
- 188. Dumping
- 189. Selective patronage
- 190. Alternative markets
- 191. Alternative transportation systems
- 192. Alternative economic institutions

Political Intervention

- 193. Overloading of administrative systems
- 194. Disclosing identities of secret agents
- 195. Seeking imprisonment
- 196. Civil disobedience of "neutral" laws
- 197. Work-on without collaboration
- 198. Dual sovereignty and parallel government

Far too often people struggling for democratic rights and justice are not aware of the full range of methods of non-violent action. Wise strategy, attention to the dynamics of nonviolent struggle, and careful selection of methods can increase a group's chances of success.

Gene Sharp researched and catalogued these 198 methods and provided a rich selection of historical examples in his seminal work, *The Politics of Nonviolent Action* (3 Vols.) Boston: Porter Sargent, 1973.

REDLINE TACTICS

A “Red Line” tactic is the discriminatory practice of withholding resources, opportunities, or access from a specific group or geographic area. This is done to maintain existing power structures and undermine the community's organizing efforts.

Identify a Redline to explore - Consider your own principles and values. Then align this with likely future actions of the Target of your Campaign. You are likely the best judge to guess what reactionary tactic your target might use as redline.

Examples of redline tactics:

- An Employer openly flouts labor law
- A local Governor or judge is arrested at their home
- A School Board unilaterally stops funding a particular program
- District leaders bring in a police presence when one is not needed

Reframe the Redline

Accept that some redlines that matter to you (even death knells for your work), may not resonate to the wider public. This is a tension. One option, before going forward, is to consider if picking more widely understood redlines is better for your group — or if there are useful ways to reframe those redlines to be more visceral/relatable. Possible examples to expand our thinking:

Cuts to Student Programs	<i>“You don’t want your children attending a program 30 miles from their home because the district won’t provide this program.”</i>
Mass firings of particular employees	<i>“Imagine your student riding in a bus with a contracted driver who may not be well trained, may not know the area, is not well known to the community.”</i>
Employees locked out of their place of work.	<i>“If they can prevent these workers from working and take away their healthcare, how can they really care about the health and welfare of our students?.”</i>
Over Policing During Peaceful Events	<i>“Why would police be needed as a response to educators, parents, and students who are peacefully, joyfully representing their point of view? This is a belief that build our nation.”</i>

Follow these steps to strategically plan for a redline Tactic

1. REVEAL — Expose the Injustice

Powerholders prefer to act in the shadows. If we want a redline to resonate, we must **bring the facts into the light** — using images, stories, and trusted voices.

2. REDEEM — Validate your Position and People

Redlines often come with smear campaigns. Those affected are devalued, criminalized, or painted as disposable. Our job is to **re-humanize** them.

3. RE-FRAME — Interpret the Event as Injustice

The system will try to spin it — calling it a misunderstanding, an isolated event, or your fault. We need to **name it clearly as wrong**, and make it part of a larger story.

4. REDIRECT — Mobilize Outside the System

Redlines CAN be pushed into courts, reviews, or commissions — slow processes that demobilize people. Instead, we can channel public anger into **direct action and visible resistance**.

5. RESIST — Build Strength and Withstand Pushback

After redlines are revealed, the backlash begins — intimidation, bribes, threats. We can **protect each other**, expose these attacks, and build long-term strength.