

Participant Handouts

2025



Organizing Strategies for work with ESP Members

UniServ Directors who represent ESP locals are responsible for identifying and developing leaders, organizing issue campaigns, and understanding and advocating for the unique needs of ESP members. Strong ESP affiliates have a high ratio of engaged leaders to rank and file members and structures that allow for rapid response, relationship development and collective action. This NEA Center for Organizing training is designed to build skills around ESP leadership identification and development. They will learn how to establish differentiated and innovative structures that can increase member engagement and union presence within and across worksites of the various job families within ESP.

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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 him or her in the eye, avoiding interruptions, reflecting your understanding, clarifying information, summarizing the other person's perspectives and sharing your own. 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 gracious includes following the COVID protocols that are in place to protect the health of this learning community.

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 preconceived notions and listening to everything someone has to say before jumping to conclusions. Most importantly, 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 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.

Leaning into 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?

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Analyzing Everyday Oppressions in Union Work

Angel is a newly hired Educational Support Professional (ESP) at Rolling Seas Elementary School – a school that they attended as a child. They are an instructional aide in the special education resource room. This school is known for high poverty, large class sizes, and a high number of English language learners. Angel was the first person in their family to get a degree from the community college. Several generations of Angel's family are all from this community. Angel wanted to continue on at state college to become a certified teacher of students with special needs, but the cost of school was too much. They are a parent who works a second job to earn enough money to eventually move out of their mother's apartment. They are grateful for their family's overall support but wants their own place. Compounding the household budget issues, Angel's child fell off their trike a few years ago resulting in huge, uninsured medical bills. Despite working to pay them off, several are in collection, which is affecting Angel's applications for rental agreements.

Upon meeting the Lead Teacher, Phyllis, Angel is immediately complimented on how well they speak and their lovely, long hair. Phyllis makes sure to discuss how supportive they are of undocumented families and how Angel should feel comfortable in this room with them. As Angel helps Phyllis set up the room for the first day of school, they notice that for any child who has a "different" sounding name, Phyllis puts a bright yellow name sign on the child's desk. Curious, Angel asks about this. Phyllis lets Angel know that these students probably don't speak English and will always come to class without lunch money. All the teachers in the special education program use this as a signal for the lunch accountability tally. "It is just easier that way," says Phyllis.

Later in the day, the conversation turns to getting to know one another and Phyllis asks Angel, "What made you want to be an instructional aide?" Angel shares their story and their aspirations to get a teaching certificate. Phyllis does not have the heart to tell Angel that this dream will likely never come true. There are no reimbursements for professional development for ESP members in the district, and most of the courses required for the full certification program are at the state college in the evening. Phyllis just knows that people like Angel would never be able to overcome the issues of child-care, transportation and added debt, so they don't mention it. "It wouldn't be nice to get their hopes up," thinks Phyllis.

Angel is approached by Carol, the Union's Building Representative (a classroom teacher), and Carol asks them to join the local union. Angel asked about the cost, and Carol responded by saying, "Support staff don't pay much considering all that we have to do for you people. We used to be separate organizations. Now, I think we're more focused on professional issues instead of what matters. The dues are described in this flyer." Carol left a folder of information and a business card of a man that she said worked for the Union. He would help Angel when they got into trouble. Angel asked, "Are there any programs for getting a teaching certification?" "I'll check," says Carol. Angel took the information, but no one ever came to talk to them from the union again. They would have loved to know how to get professional development. Angel called the union office once, and when they asked for information was immediately told they had to be a member first and that they needed to contact the building rep or UniServ Director. "All I wanted was information," they thought, "and all I got was sent back to the people that did not contact me. I guess they really don't want people like me."

As the year went on, and Angel got to know more classroom teachers and instructional aides, they noticed that most of the classroom teachers were people who did not live in the neighborhood around the school, and that most of the instructional aides lived in the school's neighborhood or very close by. At lunch one day Angel shared with their co-worker and neighbor, Elise, their aspirations for becoming a classroom teacher. Overhearing their conversation, Becky, a new classroom teacher, shared her story. "I started here on a conditional certification with only a two-year degree. All I had to do was agree to get my four-year degree in the next three years. I love the state college, my colleagues in the second-grade wing watch my classroom so I can make the evening classes, and we have a babysitter who watches my son in the evenings while I am at class. It is an upfront investment, and the district reimburses up to nine credits a year. I just don't know why more of you don't take advantage of this!"

Analyzing Everyday Oppression in Union Work

Answer the five questions below.

1. Is Angel thriving in the institutions in this story (housing, healthcare, school/union)? What are examples from the story that leads you to this conclusion?	2. What are examples of missed opportunities for the Union with Angel? Why do you think that these misses are happening?
3. What are ways that the Union could engage with Angel?	4. What race and gender is Angel? What evidence from the story leads you to these conclusions?

5. As a staff member, what would you do to support the local leaders & members to engage with Angel in a meaningful, non-transactional way?

Race, Class, and Gender Justice Lens

1. Is this work race, class, or gender explicit?
Are materials, communications, work products from this work race, class, or explicit?
2. Who benefits from this work?
3. How many people of color, of different genders, and different classes are positively impacted by this work?
4. Is there a race, class, or gender justice disparity that is being addressed? Are conditions being improved?
5. Is the race, class, or gender equity practice being introduced? Can this practice be systematized?
6. How does this work build your organization's race, class, or gender justice muscle?

WHAT IS A DOMINANT NARRATIVE?

A dominant narrative is an explanation or story that is told in service of the dominant social group's interests and ideologies. It usually achieves dominance through repetition, the apparent authority of the speaker (often accorded to speakers who represent the dominant social groups), and the silencing of alternative accounts. Because dominant narratives are so normalized through their repetition and authority, they have the illusion of being objective and apolitical, when in fact they are neither.

In almost any topic you explore as a leader, there will likely be dominant narratives that others – or yourself- have encountered and may believe uncritically. The difficulty in dealing with Dominant Narratives is that they are often supported by “perfectly logical explanations.” This means that simply providing your own “perfectly logical explanation” will not shift the narrative. What follows are some guidelines for helping shift a dominant narrative towards your narrative.

GUIDELINES FOR SHIFTING THE DOMINANT NARRATIVE

DO

- **UNMASK**
 - Name the dominant narrative when you see it at work.
 - Point out that what you just saw on the news or heard from a friend, or the law that was just passed, was based on particular values and beliefs.
 - *“The way you are talking about the recent contract settlement sounds like you think teachers are pretty greedy and we’re only looking out for ourselves.”*
- **ELEVATE**
 - Name the values and beliefs from our new narrative that you want to see lived out in the world.
 - Connect it to places where your audience may see that happening already.
 - *“I really like it when parents come in and express their appreciation – especially when they acknowledge they don’t now how we do it – it helps me feel valued and respected”*
- **CONTRAST**
 - Lay out what might be different if your values/convictions were the ones shaping what happens in the world.
 - Be specific about how we have the choice to approach situations through a different belief system.
 - Invite a rethinking of the situation.
 - *“I guess we have to decide if we want to scapegoat teachers for the many challenges we face or accept teachers as willing and able partners in educating all kids.”*
- **DRAW ON YOUR OWN JOURNEY**

- While it's important to personalize this, it's also important to do it in a way that anyone can see themselves in it. Describing your own realizations and shifts will help others find their own way in the conversation.
- *"I can understand your reaction, there are times when I realize that I've been reacting to what others say and not putting forth my own beliefs – it gets discouraging – but I realize now I've only been making it worse."*
- **SUSTAIN YOUR EFFORTS AND CONNECT WITH OTHERS**
 - Shifting a dominant narrative does not happen quickly – it takes sustained effort, over time, with many people working at it.
- **DEMONSTRATE YOUR WORLDVIEW, DON'T JUST WRITE AND TALK ABOUT IT.**
 - Our actions say as much or more about our values and beliefs as our words.

DON'T

- **FOCUS ON CHALLENGING FACTS OR INTERPRETATIONS OF INFORMATION**
 - This will not shift the narrative. Your arguments, as convincing as they may be, will ultimately lose out to the dominant narrative.
- **ATTACK PEOPLE FOR THEIR WORLDVIEW**
 - Many people operate out of the dominant narrative, even if unconsciously. Shifting public narratives will take personal conversion and transformation. You cannot move people if you attack them.
- **NAME THE DOMINANT NARRATIVE AS "WRONG"**
 - Our assumption is that competing values & beliefs live within people. We want to provide people a chance to choose the ones they want to live out of and/or balance those competing narratives (e.g. accountability of and respect for teachers).
- **TRY TO CONVERT OR CONVINCE PEOPLE**
 - We are trying to bring out the best of what is already in people, help them find the resonance for themselves. This is, in part, an emotional journey and our usual approaches to argument and logic don't work so well in this arena.

Scenario #1

Consider the following scenario:

You are at a large staff meeting and a rather outspoken colleague says, “I can’t believe these ESP members! They get all of the same benefits of our certified members. They and take up the much more of our time in services and they are still complaining about the amount of their dues and the money they make! Why can’t they just be content with what we give them? Why don’t they just go join another union that better fits their needs?!”

- 1) How will you respond to **unmask** the dominant narrative?

- 2) What will you say to **elevate** our new narrative? What kind of **connections** can you draw your audience in?

- 3) How can you **contrast** what was said? What can be said to point out how things might be different if the new narrative was shaping education discussions?

- 4) What can you say to **draw on your own journey** with this world view? How can you draw on your own experience?

Scenario #2

Consider the following scenario:

While at a political fundraiser, your local elected representative, who you respect greatly, says, “I’m a strong labor supporter, but the hourly ESP workers in the “teachers union” are sure a different breed from the teachers. Their fight for raises and benefits are getting in the way of real educational investment in our schools. Their services cost us a lot and we could do a lot better if we used contract services. The cost of employing them keep the kids in this state from getting real benefit from better paid teachers. If we are ever going to have great schools, the union is going to have to stop being so focused on wages. Besides, all that union activity does not seem very professional to me.”

- 1) How will you respond to **unmask** the dominant narrative?
- 2) What will you say to **elevate** our new narrative? What kind of **connections** can you draw your audience in?
- 3) How can you **contrast** what was said? What can be said to point out how things might be different if the new narrative was shaping education discussions?
- 4) What can you say to **draw on your own journey** with this world view? How can you draw on your own experience?

Scenario #3

Consider the following scenario:

You are sitting at a local school board meeting with some members. A community member over hears you talking, comes over and says, “Why are you folks always asking for more from this community? Our schools already take the biggest portion of our taxes and they still don’t turn out graduates that can work or participate positively in our society. Employees at that school have more benefits and make more money than most of us here in this room. I mean you knew you were not going to get rich working at a school and it must be rough to summers have off. I’d love to be able to sit back all summer and relax.”

- 1) How will you respond to **unmask** the dominant narrative?

- 2) What will you say to **elevate** our new narrative? What kind of **connections** can you draw your audience in?

- 3) How can you **contrast** what was said? What can be said to point out how things might be different if the new narrative was shaping education discussions?

- 4) What can you say to **draw on your own journey** with this world view? How can you draw on your own experience?

Scenario #4

Consider the following scenario:

At a local community meeting, a neighbor who is discouraged about the increasing cost of property taxes says, “ They should just get rid of all those extra folks at that school. I mean the superintendent and principals have too many secretaries, kids could eat in their classroom with their teachers, and the way those buildings look, we sure aren’t getting our money’s worth out of all those folks who work there. It is clear that we just need to spend our tax dollars on learning. Maybe it should just be a charter school and run all that non learning stuff like a business.”

- 1) How will you respond to **unmask** the dominant narrative?

- 2) What will you say to **elevate** our new narrative? What kind of **connections** can you draw your audience in?

- 3) How can you **contrast** what was said? What can be said to point out how things might be different if the new narrative was shaping education discussions?

- 4) What can you say to **draw on your own journey** with this world view? How can you draw on your own experience?

Scenario #5

Consider the following scenario:

At a contract negotiations meeting with the certified employees a leader of the team who is struggling with the pace of bargaining with the district says, "You know that we need to settle our contract first. If we don't, the district will give our raise to the ESPs who are set to bargain next. I have already heard that the district approached them about entering bargaining asap. Our members put in more hours and have a lot more education and they deserve to do better in this bargain. We have to stick to our own and let the district know we want to settle, and settle fast."

- 2) How will you respond to **unmask** the dominant narrative?

- 3) What will you say to **elevate** our new narrative? What kind of **connections** can you draw your audience in?

- 4) How can you **contrast** what was said? What can be said to point out how things might be different if the new narrative was shaping education discussions?

- 5) What can you say to **draw on your own journey** with this world view? How can you draw on your own experience?

Scenario #6

You are at a membership meeting of the local Classroom Teachers Union. A rather outspoken leader says, "I can't believe these ESP members! They are complaining about how they aren't paid when we have breaks and snow-days. They could have gotten a degree just as I had to do. They choose to be an hourly worker. With this economy, they should just be glad they have a job!"

- 2) How will you respond to **unmask** the dominant narrative?

- 3) What will you say to **elevate** our new narrative? What kind of **connections** can you draw your audience in?

- 5) How can you **contrast** what was said? What can be said to point out how things might be different if the new narrative was shaping education discussions?

What can you say to **draw on your own journey** with this world view? How can you draw o

CROSS-CLASS CAPACITY TOOL

<https://www.showingupforracialjustice.org/cross-class-capacity-tool.html>

This living document was created by the SURJ (Stand Up for Racial Justice) poor and working-class group as an act of love and commitment to our common desire, across the class spectrum, to bring white folks into action, dismantle white supremacy and engage with the complex struggle and beauty of collective liberation.

Some framing: White people working together to dismantle racism is critical work. Attempting to do this work without acknowledgment and thoughtfulness to how class affects folks' experience of race limits a true understanding of what is racism and what is classism. Working to dismantle white supremacy and to end structural and interpersonal racism doesn't mean we can avoid talking about issues of class privilege. On the contrary, if we don't become bold about what cross-class solidarity work means as white folks yearning for racial justice, our work will be less effective and our wins short-lived.

With this in mind here are some examples of common sticky spots that class privileged whites come upon when working across class:

- **Conflating Race and Class.** Assuming that all white people have access to wealth erases white poor and working class people. Referring to communities of color with an assumption of poverty erases the Black middle class and other class privileged people of color. These two systems of oppression use similar tactics and have always been intimately linked, however they are not interchangeable.
- **Scapegoating.** Through subtle or direct means, operating with a bias that assumes working class whites are somehow more racist than white folks with money reinforces classism. This scapegoating takes responsibility away from middle and upper class families who have often accrued wealth through exploitation and takes emphasis away from the damaging policies and practices put in place by wealthy whites that structurally reinforce both racism and classism.
- **Discomfort around conflict.** Recognition of conflict and figuring out disagreement is very different across cultures and classes. White, class privileged cultures often carry a value that avoiding conflict or being 'nice' and 'polite' are the better/only ways to talk about difficult things. This value is not universal and can sometimes stifle needed dialogues.
- **Outcome over Process.** Sometimes the desire to create action can override the process of thoughtful and intentional planning. When intentionality breaks down, group norms will almost always default to those with the most privilege/power calling the shots.
- **One right (controlling) way.** As is true with whiteness in general, within class privileged circles there can be an attachment to things happening in a particular way. The sense of what is the right way is informed by folks' class background and status. Attempts to control or micromanage the details can push out poor and working class involvement/leadership.

- **Attempting to homogenize.** Just as whiteness can attempt to subsume everything into a false perception of sameness, class privileged cultures often do the same. Creating cultural norms around language, dress, actions etc that cater to middle and upper class comfort. Bringing working class folks to the table without changing the class culture of the table in question will often be short lived.
- **Palatability.** Choosing only working class folks who are college educated or otherwise assimilated into middle/upper class norms to be a spokesperson/reference point around class.
- **Convenience.** Recognizing class dynamics when it's convenient but treating it as off topic when brought up in a way that challenges power or requires long term investment in our lives and communities.
- **Masking/False Scarcity.** Presenting as though stressed about money from a false sense of scarcity, not a lived experience of not having access to enough. This can be done in an attempt to relate to working class people or to assuage guilt, confusion, a lack of exposure to cross class learning spaces, or a combination of them all.

Examples of things that can be alienating to welfare/working poor, low income and working class whites:

- Speaking for and about working poor, low income and working class whites without the necessary leadership or adequate representation from these communities.
- Introductions that pivot on education/employment status and lineage or political resume and credentials. This holds true within emails, on conference calls and in person.
- Giving advice or asking questions about people's struggle; our impairments/health, lack of money, employment or anything that might be intrusive, patronizing or blaming.
- Presuming shared experience about activities that are dependent on middle class lifestyle and values of some sort, examples: college, out of state / country travel for pleasure, rejuvenation or political actions
- Using acronyms without explanation
- Not using class identifiers (see below)
- Defensive reactions to questions and feedback about barriers and assumptions that hinder our involvement.
- Inaccessible language and jargon (academic and non-profit speak)
- Making fun of, dismissing, or shaming working, welfare class, and rural cultures and equating our communities with ignorance and bigotry.
- Cultures of perfection, 'professionalism', and respectability politics (meaning messaging, language, formatting, and campaign demands have to be always appear 'respectable' to middle and upper class people in order to be legitimate)
- Commodifying our lived experiences to add credibility without an implemented commitment to alter the material conditions of instability and poverty we often are living through within our practice of white anti-racism.

Examples of some things that create room to be, breathe, and engage as welfare, working-poor and working-class whites:

- Provide food and childcare at meeting spaces/events. Ensure that meeting spaces are child friendly and have reasonable start and finish times
- Use class identifiers – be transparent and honest about your class background when getting to know each other and when starting to work together. Often class is not mentioned, and therefore, class experiences and differences are erased, even though they strongly inform everything we do!
- Practice creative ways to redistribute wealth. Examples include: prioritizing (whenever possible) resourcing of poor, welfare and working class leaders, as well as local leaders in under-resourced areas, over well resourced, urban career consultants. Work on building a presence within our communities that provides support for ordinary needs. Resource and staff regular food banks, provide basic advocacy for folks navigating government benefits. Help with access to childcare, healthcare and housing. Commit to stay - reduce the impact economic fragility and exploitation has upon our vulnerability to the race bribe. Build up local leadership within these spaces.
- Move at an accessible pace! Keep in mind that poverty and instability can be debilitating and at times completely preoccupying. Modeling a schedule, leadership or decision making structure based on class privileged and able bodied capacity can be a deterrent to poor and working class involvement.
- Engage in campaigns that are relevant to welfare and working class whites, ideally that are developed by and for low-income white folks. Includes relevancy in approach, demands, and language.
- Reflect on what type of culture is being created and in what ways it's centered around middle/upper class norms and comfort. What would it look like to center it around working class participation instead? Practice moving back from the front of the room and decision-making positions - embrace the value of being middle class / upper working class supporters and allies of working poor and low income leadership and direction.
- Support meeting spaces (in person, phone, online, etc.) for welfare and working class whites to strategize, share and develop resources, develop peer mentorship relationships, and support each other!
- Prioritize resourcing of leadership development and training for poor, welfare, and working class organizers
- Provide fundraising support for poor and working-class led projects (fundraising training as well as sharing resources)
- Provide travel support – metro cards / rides . Know where the local food stamp / HUD/ social security/ food banks office and shelters are.
- Find other class privileged people to sort thru things with. Challenge one another to dive deeper with your understandings and self reflection. Understand that less privileged folks get to move away from situations, without explanation, that they simply don't

want to have to deal with... again. Remember it is not the responsibility of welfare and working class folks to be supportive of a middle/upper class learning moment when those with less power are being hurt, alienated, offended, oppressed, triggered, and insulted.

Shifts of Consciousness for the Anti-Classist Activist

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1. Charity is Not Activism

Charity, when not coupled with an insistence on and movement toward systemic change, only reaffirms the power hierarchy. It does not—*can not*—lead to real sociopolitical reform because it fails to challenge existing power structures. Moreover, a benchmark of authentic activism is personal vulnerability. Charity does not make me or my privilege vulnerable. In fact, it allows me to maintain a comfortable distance. Therefore, seeing charity as activism is a demonstration in privilege.

2. “Culture of Poverty” or “Culture of Classism”?

Dozens of studies conducted since the early 1970s refutes Oscar Lewis's (and more recently, Ruby Payne's) construction of a “culture of poverty.” The poor Somali immigrants arriving in Minnesota this year are *not* the same culturally as poor families who have lived for generations in Appalachian West Virginia, for instance. And again, focusing on the supposed cultures of oppressed people is an expression of privilege, as it diverts attention from the gross and systemic class inequities (such as inequitable access to high-quality schooling) that pervade the U.S. and the world. It is this culture—the culture of *classism*—that I, as an anti-classist activist, must work to eliminate.

3. Capitalism Is Not Democracy

The consciousness of the anti-classist activist refuses binaries and false correlations by challenging most vigorously those notions that are defended most vigorously by the power structure. Chief among these is the unquestioned rightness and fairness of capitalism. Despite the propaganda, there is nothing inherent about capitalism that aligns it with democracy or freedom or justice. But somebody benefits from the notion that these concepts are synonymous. Who might that be? Other notions, systems, and conditions for critical reconsideration: consumer culture, globalization, and corporate welfare.

4. The De-demonization of Socialism

It's odd, don't you think, that while everybody seems to agree that a public (meaning *socialist*) education system is an essential part of democracy, a public healthcare system is inherently evil. And again, who exactly benefits from this demonization?

5. With Whom Lies the Deficit?

Deficit theorists such as Ruby Payne essentially blame poor people for their poverty by pointing to supposed deficits in their characters, spiritualities, and world views. Deficit theory helps to justify what Herbert Gans calls “the war against the poor”: the process of linking nearly every social ill to people in poverty in order to justify the elimination of social programs and policies meant to help them. If we see the poor as “undeserving,” then we needn’t waste our energies questioning skyrocketing healthcare and housing costs, the dissolution of labor unions, the disproportionate amounts of water and air pollution in high-poverty neighborhoods, or the fact that tens of thousands of people die all over the world each day from preventable poverty-related illnesses. The *real* deficit is a moral one and it lies with people who perpetuate classism, not with those who bear the brunt of that classism.

6. The Un-Meritocratic Meritocracy

The ideal of meritocracy assumes a level of equity and social justice that simply doesn’t exist, either in the U.S. or most (if not all) other societies. The education system is a good example. Economically disadvantaged students are much more likely than their wealthier peers to be assigned to schools with an abundance of unlicensed and inexperienced teachers, dilapidated buildings, inadequate educational materials, lower-order thinking curricula, over-crowded classrooms, and high teacher turnover rates. These conditions are wholly unrelated to individual students’ intelligence, ability, motivation, or “merit.” But they have an enormous impact on the quality of education students receive and, as a result, on their future opportunities. We might say we have a *wealthocracy*, wherein access and opportunity are granted on the basis of one’s existing levels of access and opportunity. Where’s the “merit” in that?

7. Everything’s an Intersection

One cannot understand classism or poverty, whether locally, nationally, or globally, without understanding its intersectionality with a plethora of other oppressions. In the U.S., for instance, classism is inextricably linked to racism. Slavery, Jim Crow, housing discrimination, Manifest Destiny—these are examples of racism institutionalized for the purpose of economic exploitation. Only about 4% of Fortune 500 CEOs are women. People with disabilities are much more likely to live in poverty than people without disabilities. Much of the undocumented immigration that some people rail against today is at least in part the result of U.S. and European colonization, imperialism, and economic exploitation of Southeast Asia, Latin America, the Middle East, and Africa. So any attempt to study or act against poverty and classism without a deep understanding of these intersections cannot succeed. And I cannot be an authentic anti-classist activist without also being a committed anti-racist, anti-sexist, anti-every-kind-of-oppression activist.

Education Support Professional Organizing

TOOLKIT



Clerical Services



Custodial and Maintenance Services



Food Services



Health and Student Services



Higher Education



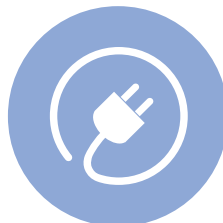
Paraeducators



Security Services



Skilled Trades



Technical Services



Transportation Services

Introduction

What Is Organizing?

Organizing is people coming together to collectively create the change they want to achieve. It is people joining together to work toward common goals.

In 2002, Marshall Ganz's article in *Social Policy*, titled *What is Organizing?* described organizing this way:

Organizers identify, recruit and develop leadership, build community around leadership, and build power out of community. Organizers challenge people to act on behalf of shared values and interests. They develop the relationships, understanding, and action that enable people to gain new understanding of their interests, new resources, and new capacity to use these resources on behalf of their interests. Organizers work through "dialogues" in relationships, interpretation, and action carried out as campaigns.



Self-Interest - A Building Block for Organizing

One-on-one conversations are a critical organizing tool for understanding self-interest and in building relationships in order to mobilize people into action.

Everybody cares about something; figuring out what that something is takes understanding the person's self-interest. Organizing is finding out what someone's self-interest is and what they care about. Nobody is apathetic about issues such as school safety, student learning conditions, dignity and respect in the workplace, professional development, or their paycheck.

Apathy is often mistaken for feeling powerless and the inability to effect change. As organizers we must tap into the issues people care about and offer inspiration and collectively develop viable solutions to address those issues. We can't make assumptions about what is in someone's self-interest; we must hear it articulated by an individual. Relationships are the foundation of organizing. If you have a relationship with someone based on trust, not only will they share what they care about—their self-interest—you can mobilize them into action.

NEA, Affiliates and Locals organize to build power to make change. Our power comes directly from our members. To successfully build power, we must engage members and increase membership. To engage and increase membership, we must understand the issues our members care about—understand their self-interest.



Ultimately we seek to build power to make change. In this toolkit, we will cover the critical elements of organizing:

- One-on-One Conversations
- Issue Identification
- Mapping the Workplace
- Bargaining—Issue Campaign
- Campaign Planning
- Building Power
- Organizing for Community Support

Organizing principles are the same whether you are trying to invite potential members to join your Association, identify and develop local ESP leaders, rally members to support demands (whether residing in a state with a bargaining statute or a state without a bargaining statute), enlist community help for an issue of concern, or drum up support for a political candidate or platform.

The strategies and tactics provided here will assist Affiliates and Locals to successfully achieve campaign goals.

One-on-One Conversations

One-on-One Conversation Tools

- The Relational Meeting: Purpose and Process of the Organizing Conversation
- An Organizing Conversation
- Conducting a One-on-One Conversation: Key Components
- Practice the Organizing Conversation
- Write Your Own Organizing Conversation
- Worksite One-on-One Conversation Reporting Form
- General One-on-One Conversation Reporting Form
- How to be a Good Listener
- Anger, Hope, Urgency, You (AHUY)

All organizing is based on building relationships and finding common ground. Personal relationships are the foundation for mobilizing members into collective action. We cannot mobilize people effectively if we don't know what matters to them and what motivates them.

Through face-to-face, in-depth conversations, organizers can build the trust of the people they are contacting and make sure their questions are fully answered. That trust and understanding, developed through personal contacts, will be necessary to maintain support for whatever kind of campaign the Association is engaged in. This is also known as relational organizing.

Whether you are in a small or large workplace, conducting one-on-one conversations with all of your ESP colleagues can feel very overwhelming. It is important to begin your conversations with colleagues who are respected by their peers and administrators. From that group, start with those you know and trust and expand your reach from there.



Goals of One-on-One Conversation

- Assess where people stand, how they feel
- Find peoples' passion
- Identify potential leaders and activists
- Develop relationships
- Identify and validate self-interests
 - > personal goals
 - > professional ambitions
 - > values
- Identify what motivates or inhibits
- Agitate—Why are things the way they are and how can things be different?
- Inoculate
- Identify social and community connections
- Get commitment
- Set a follow-up plan
 - > Build solidarity/power
 - > Collect and analyze data



Listening

Asking questions and active listening during a one-on-one conversation can identify common ground—issues, interests, values—that can lead to collective action. Listen for:

Issues: The topics, problems, concerns and public policy that people care about.

Interests: A person's stake in an issue.

Values: The moral principles people live by.

Capacity: What an individual can contribute to an issue or group, e.g., money, time, special skills, networks.

Commitment: What an individual is actually willing to do. A person's commitment is directly related to the depth of his/her interest.



Active Listening

There are times when we all should listen rather than talk; however, this is often easier said than done. Research shows that we listen to people at a rate of 125–250 words per minute, but think at 1,000–3,000 words per minute. And once finished talking, we can only recall about 50% of what was said. We need to take note and better learn that there are times when being silent is powerful...and then there are times when we really do need to stop the conversation to speak up and ask those important questions before the topic becomes a runaway train.

It might be easier to discern the difference between when to talk and when to listen if you apply the 80/20 rule. Spend 80% of your time listening and only 20% of your time actually talking.

Plus, when you listen, you can repeat some of the words back to the other party and they will be astounded because you “get it” and listened with authenticity to hear and UNDERSTAND.

An Organizing Conversation

Here are some guidelines for a fruitful conversation (or a series of conversations) with a co-worker.

Nobody should follow a script mechanically, of course. Talk with people like human beings! But think of this outline as a tool. The steps can help you move toward a goal, so your co-worker isn't left feeling like their time's been wasted with a spiel or a gripe session. Done right, an organizing conversation leads to action.

Your job is mostly to ask questions. You want your co-worker to realize:

- He/she cares about a problem.
- There's a decision-maker who has the power to fix this problem.
- The decision-maker won't fix it until someone pushes them to.
- If your co-worker really wants this problem fixed, he/she has to join you and other co-workers in taking action.

But just telling them all this wouldn't be very effective. Instead, you want to ask the right questions that prompt the individual to bring it up on their own. To ask the right questions, you need to choose an issue by understanding the difference between an issue and a problem. As the Midwest Academy puts it, “A problem is a broad area of concern. An issue is a solution or partial solution to the problem.” You don't organize people around homelessness; you organize them around a bill to allocate more funding for affordable housing programs, or around creating a coalition of churches willing to provide shelter to those who need a place to stay.

Most likely, if you are concerned with large, complex problems like homelessness or hunger, you will not be able to pick one issue that will solve the problem completely; you will need to target one specific facet of the problem. How do you choose that issue? The Midwest Academy suggests many criteria for this process, as follows.



Issue Identification

Issue Identification Tools

- Checklist for Deciding on an Issue
- A Good Organizing Issue
- Issue Selection
- Evaluate Your Organizing Issue
- Getting the Ball Rolling

It's important to organize around issues, not problems.

The Criteria for Deciding on an Issue

1. Result in a real improvement in the lives of students, school staff, and community members

If you can see and feel the improvement (if it is measurable), then you can be sure that it has actually been won. The group must seek a broad consensus on what an improvement really is and state it clearly as a goal.

2. Give people a sense of their own strength.

People should come away from the plan feeling and knowing that their efforts caused the project to succeed. This builds the confidence to take on larger issues.

3. Alter the relationships of power.

Building a strong coalition creates a center of power and communication that leads to changes in the way the decision-makers make decisions.

4. Be worthwhile.

People should feel that they are working for something about which they care, and which merits the effort.

5. Be winnable.

From the beginning, people will have to be able to see that there is a good strategy for winning on an issue. Don't choose an issue that is so huge and abstract that the end result is unimaginable. Those involved should be able to see, from the beginning, that there is a good chance of succeeding in their efforts.

To facilitate development of a good strategy, try to get advice from those with experience:

- Find out who has won on the issue and talk with them.

To develop a winnable project plan, consideration must be given to costs to your group:

- How much money will your plan cost?
- How much time and effort will your plan require?

Consideration must also be given to the cost of any opposition to your issue:

- How much money will your plan cost those who might oppose it?
- How much money are they likely to spend to defeat your plan?
- What do they value that will make them want to hold out against your plan?



6. Be widely and deeply felt.

Many people must feel that the issue is real and agree with the solution. No matter the job family, ESPs must feel strongly enough about the issue to do something about it.

7. Be easy to understand.

It is preferable to not have to convince people that the issue exists, that the solution is good, and that it is important for them to help solve it. Sometimes this is necessary, though, particularly with issues that involve school finance.

8. Identify the decision-maker.

The decision-maker is the person who can give you what you want. A more complex project plan may focus on several decision-makers. During planning, if the group can't decide who the decision-maker is, it will be necessary to reexamine the viability of the issue or define the goals more clearly.

9. Have a timeline that works for your group.

Your group should establish a timeline that defines the approximate dates for the beginning, NEA Organizing ESP's Page 24 9,

middle, and end of your project plan. It will be important to put your goals and accompanying tactics in the timeline.

10. Do not be divisive.

Avoid issues that divide your group. Survey your group to find an issue that will be supported. Will this issue help or hinder in reaching new people?



11. Build leadership.

The plan should have many roles and tasks inviting the involvement of a multitude of ESPs, whether food services, custodial and maintenance services, security services, etc. Consider the skills people will develop and the contacts the group will make for future work together.

In a plan that involves working with a coalition, building leadership has a different meaning since the coalition partners are already leaders. Coalition leaders may need to learn to work with each other and to merge several plans together.

12. Be consistent with your values and vision.

Values should be consistent with the group's values and vision in support of public education and public education employees.

13. Set your organization up for the next fight.

You need to build capacity through leadership development, capacity building, messaging, actions, activist identification, etc., which will give you a jump-start when you are ready to go for the next campaign.



Let's Begin Organizing... The Critical Conversation

1. Discover the issues

Begin by asking questions—and listening to the answers—to learn what your co-worker cares about. Make your questions open-ended, especially when you're getting to know someone.

How's your day going?

How did you get this job?

What do you like about working here?

When you're organizing around a particular issue, your questions might get more pointed. Still, even if you have a petition about the awful new schedule, don't leap straight into "Will you sign this?" Instead, ask:

I hear you now working a morning and afternoon shift schedule—how does that work for you?

The point is for your co-worker to remind himself or herself how they feel about this problem, before you ask them to act. If you've discussed this issue before, you can still ask how it's affecting them today, or share someone else's story and get their reaction.

2. Agitate

React to what he or she tells you, and ask follow-up questions. By reacting, the organizer can help the other person feel they have permission to be angry:

Wow. How long has that been going on?

How does that make you feel?

Is that okay with you?

How are you coping?

How is that affecting your family?

3. Lay the blame

Get them talking about who's responsible.

Why do you think we're having this problem?

Who's in a position to fix it? What would they have to do?

Do you think this problem is going to correct itself?

Many times we feel our problems are just "the way things are." Realizing that bad conditions didn't fall from the sky can be empowering. If someone made the decision that caused this mess, that someone could also unmake it.



4. Make a plan to win

Now that your co-worker is angry, it's time to offer some hope. Hope comes from your power in numbers and a winnable plan. That's how you make your problem into a problem for the decision-maker.

Most people want to go back to the old bell schedule. The administrator hasn't listened, but what if 25 of us sign this petition, and we all march into his office together to deliver it?

What do you think he'll do? Will he be able to keep ignoring us?

What's his supervisor going to say?

This step will be trickier if today's petition doesn't address a problem that this person feels strongly about. You'll have an easier time organizing if you choose issues that are widely and deeply felt.

But what you can say is that power in numbers is our only way to get a say on any issue. For instance:

If we win on this issue, do you think administration will learn something? Will taking action on the next issue be easier?

This is the first step. We've all got to start backing each other up. How else are we going to build enough power to fix the understaffing you're talking about?



5. Get a commitment

Ask the member to be part of the solution by taking a specific action.

Will you sign this petition and come with us to deliver it on Thursday?

If someone is fearful, acknowledge that their fears have real reasons behind them. But still, things won't get better unless they get involved. Your job isn't to convince them that their fears are unfounded, but that they need to act anyway.

How is the schedule ever going to get fixed if we don't take action? Are you willing to let this problem go on?

Helping the member through it will be a lot easier when you're inviting them to act on what they've already said—not pushing an action you're trying to "sell."

6. Inoculate and re-commit

Now your co-worker is committed—but does he/she know what they're getting into? Ask how they think management will react to the action.

What do you think the administrator will say when we go to his office?

If there's a likely risk he/she hasn't thought of, warn them about it.

What if he gets angry and threatens to write everyone up? What if he offers to meet with one or two of us but not the whole group?

Talk through the possible outcomes. Then ask whether you can still count on their participation.

Does any of that change your mind?

This part might sound like you're undermining your organizing. You've gone to all this trouble to help your co-worker decide to act, and now you're trying to talk them out of it? But like inoculating against a virus, the idea is to help them develop an immunity to the administrator's attacks—by giving them a small dose before they're exposed to the real thing.

This way, when the administration reacts, he or she won't be thrown by it. In fact, your correct prediction will boost your credibility.



7. Set a follow-up plan

As organizers, we need to be continually cognizant that follow-up is the key to organizing. Without timely and continual follow-up, much of your hard work will be for naught.

Agree on the next step, and when you'll check back in. Maybe they're going to meet you on Thursday to deliver the petition, or they'll ask two co-workers to sign. Or maybe you simply promise to report back on Friday about how the meeting went.

Remember, you're not just trying to pull off this one action. You're also trying to draw people gradually closer to the center and build an ongoing network of communication. You're trying to make standing up, in an organized way, a normal and natural part of workplace life.

Can you ask Jane to sign? Great! I'll come back at the end of the day to find out how it went, okay?

Assessment of One-on-One Conversations

Assessment is a word that describes the act of organizers engaging people in one-on-one conversations to determine as best as possible their degree of support for the union, based on the directly observable verbal, visual, and behavioral indications uncovered in the conversation. Assessments are conducted several times during the life of an organizing campaign and for various strategic purposes. Although the underlying reason for assessments is to measure the level of union support at any given point in time, assessments also are used to:

- Track movement of support.
- Continually assess leadership potential and development.
- Guide allocation of time and resources in a campaign.
- Provide a road map of who needs the highest priority of a personal organizer's attention in a campaign.
- Measure committee effectiveness.
- Uncover issues.
- Gain feedback on effectiveness of tactics and issues.
- Assess outcome of worker "tests" throughout the campaign.
- Test effectiveness of the employer campaign.

Conducting assessments is a fundamental skill that organizers must learn and constantly practice. Conducting assessments effectively calls upon an organizer's skills in communication and observation, especially listening skills. Assessments must be as precise as possible, directly observable, and measurable.

Assessment Dos and Don'ts

DO always base assessments on directly observed verbal, visual, and (most important) behavioral indications of the person's degree of support for the union, such as volunteered statements or more preferably observable actions in support of the union.

DO NOT base assessments on supposition, hearsay, rumor, or a previous assessment.

DO begin assessment conversations with open-ended probing questions that allow you to uncover indications on which to base your assessment.

DO NOT rely entirely on closed-ended "yes" or "no" questions, or direct questions on the person's degree of Union support that will easily allow the person to provide the answer he or she thinks you want to hear or need to hear so you will just go away. If you do ask

Remembering your conversation

It is appropriate—and strongly advised—to make notes immediately after the conversation when the organizer is no longer with the person. Also, it is appropriate to make notes on information a person offers to the organizing campaign, such as names of co-workers, phone numbers, information on the employer, etc.—but first gain permission from the person to do so.

Prior to starting the conversation, a question such as: “Do you mind if I take a few notes as we talk?” will go a long way in building the relationship.

direct questions, make sure you collect other evidence to support or refute the answers you hear.

DO use active listening skills.

DO NOT be so focused on how you will respond to what you hear that you miss important indications provided to you in the conversation that will help you with your assessment or that will provide clues on how to probe more deeply for those indications.

DO watch for non-verbal indications in addition to what is being said in the assessment conversation.

DO NOT ignore facial expression and body language. They are important elements of the conversation.

DO treat the assessment conversation like any other organizing conversation.

DO NOT communicate overtly that the purpose of the conversation is to make an assessment.

DO make mental notes of how you will assess the person, how you will justify that assessment based on what you observed, and any issues or problems uncovered in the conversation.

DO NOT make written notes during the conversation and **DO NOT** complete any paperwork associated with the assessment in front of the person.

DO NOT be fooled by the “friendly 4,” the person who is nice to you but does not provide any evidence of having the characteristics of someone who should be assessed as a “1,” “2,” or “3.”

DO NOT confuse assessing worker support for the union with assessing personality. There are people whom you do not personally admire who are “1s.” Conversely, the nicest person you know may never support the union.

DO end the assessment conversation in as positive a manner as possible, keeping the door open for future contact.



Code	Assessment Definition
1	Leader: member or potential member who will do anything for the campaign’s success
2	Supporter: member or potential member who supports the organizing campaign
3	Member or potential member on the fence, needs follow-up
4	Opposes union and will never support the campaign
0	Member or potential member not yet assessed

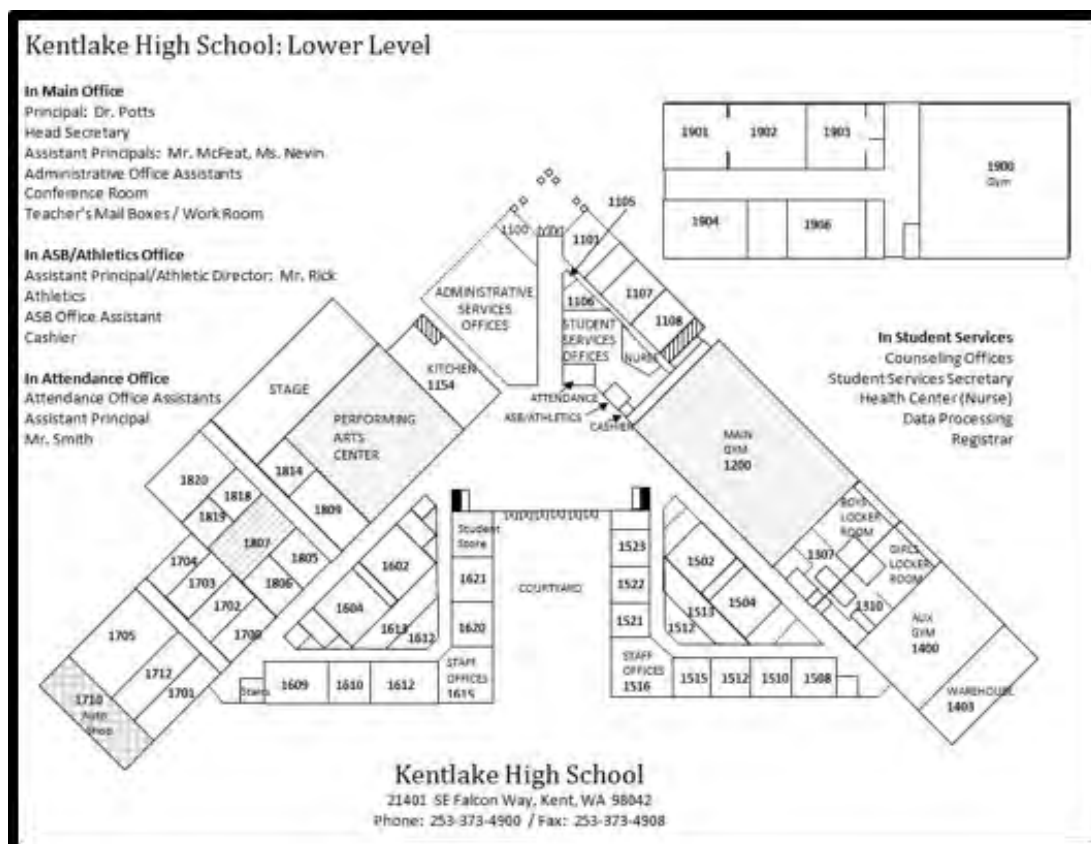
- Draw Your Own Workplace Map
- Make a Chart of Your Workplace
- Map How People Connect
- Analyze Your Workplace Map

Once created, a map gives us a look at selected data from a bird's eye view and provides a starting point for a strategic discussion of organizing.

- Map out where ESP members/potential members are, supervisors/administrators, bus drivers, maintenance and cafeteria workers, etc.



- Find the worksite's "Hot Spots" and "Dead Zones."
- Find where conversations and action happens—do people congregate at the bus barn in the mornings? Do ESPs have a favorite "coffee" break location?
- Check your map against your worksite rosters.





Also mark the wider circle of Union supporters.

Who signed the last petition?

Who is a member/potential member?

Map out how people connect

Mark the groups.

Draw a circle around the people who form each work group and each social group. If members of a group are scattered all over, indicate them some other way, such as with a certain color or symbol.

Who goes to the same place of worship?

Who socializes together?

Who works together?

Who are all the smokers?

Who carools together?

Who are the Spanish- speakers?

As you identify groups, discuss them.

How does this group relate to the administration?

What are the biggest problems affecting this group?

Keep your observations respectful and factual, not "gossipy." The idea is to find insights that will help you organize with these co-workers, not repeat stereotypes or gripes about them.

Mark the leaders. Indicate each group's leader with an appropriate color.

Who's the main leader in this group?

Who do you go to with problems?

Map out union support. Who is part of your organizing team so far? If there's not a formal group, choose some criteria.

Who gathered signatures on the latest petition?

Who's helping to map the workplace?

Leader Identification

Fundamentally, a leader is someone who has followers. That means there are others who will take an action—sign the petition, wear the sticker, attend the rally—when this person asks. When conducting a one-on-one conversation and mapping the workplace, it is critical that we keep an eye out for natural leaders.

Leaders are people who:

- **Have a following.**

Leaders know other people in the community or in their building or district who share their concerns. Leaders identify other people who can be engaged in the Association/campaign and welcome new people readily.



- **Deliver.** If a leader promises to do something, he or she does it.

- **Are accountable.** Others in the organization or community care about what a leader is saying or doing on their behalf. Leaders check in with the people they represent.

- **Listen.** Leaders have their ear to the ground and take the time to ask other people what they need and what they think.

- **Motivate others.** Leaders bring out the best in other people.

- **Get respect and give respect.** Other people listen to leaders and view them as trusted colleagues.

- **Rise to the occasion.** In a crisis, others can count on leaders to respond.

- **Turn anger into action.** Leaders are comfortable expressing their dissatisfaction with oppressive people and institutions and are ready to direct their anger toward doing something productive.

- **Are hopeful.** Leaders believe that change is possible and that they have a role in creating their own future.

- **Understand self-interest.** Leaders know what is important to them and what they hope to achieve from building the organization. Leaders believe that working with others is how to get what they want.

- **Want to build collective power.** Leaders know that building collective power is the way to create long-term solutions to building level, district level, and community social problems.
- **Have a sense of humor.** Leaders understand that humor sustains communities and individuals, and prevents bitterness and burnout. They may not be comedians or great joke-tellers, but they are able to find the humor in both the good and not-so-good aspects of everyday life.
- **Are natural role models.** Not all leaders have titles or hold elected offices, but they have a following amongst their peers.

A leader is not necessarily:

- The loudest person in the group.
- The person who speaks the most.
- The person with the most money or education.
- The person who is most interested in politics.



Building the Organizing Committee

(Association/Building Representatives, Member Engagement Teams, Action Teams)

- Composed of a group of the most respected leaders in the workplace who are representative of the workforce. Both members and potential members.
- The Committee members are the organizers of the Association/Union in the building/school.
- They work as a team and set goals and benchmarks for their work as organizers.
- They act as a group and not as individuals; always aiming to engage in collective action.
- They obtain and keep the necessary information to be able to reach their colleagues at any time.
- The building's organizing committee helps the Local put together the Local's organizing committee.

- They identify potential leaders and engage co-workers in the activities of the Local.
- They will listen to their co-workers' issues and collectively will try to strategize for solutions.
- The members will be trained on collective action and will also conduct trainings as they become more familiar with the subject.
- They will be trained and will conduct one-on-one interviews with their colleagues, and will keep detailed records of those conversations.
- They are able to listen patiently, and when colleagues feel listened to they grow closer to the organization.
- They provide the same responses as other members when asked the same questions, and they are also able to say: "I don't know, but let me find out for you." They speak with one voice.
- The members of the Committee build solidarity in the workplace.
- They are trustworthy and keep confidences. They DO NOT gossip.
- They maintain a positive outlook when faced with a crisis and are always looking for an organizing opportunity; always reminding their co-workers that they can achieve much when working together.
- Committee members display good common sense when faced with adversity.
- They accept feedback and admit mistakes, but invariably look forward to making a change and not staying stuck in the error.
- They maintain a consistent message that is education centered and not tied to a political party or ideology based.
- Committee members will ensure their colleagues are informed of all Association/Union activities, regardless of membership status.
- They will have as a goal to gain buy-in from all the members and potential members working with the organization.



Bargaining–Issue Campaign

Organizing for Bargaining or Organizing for an Issue Campaign Tools

- Sample Contract Survey
- Organizational Readiness Checklist
- To React or Not to React
- Answering Tough Questions
- Practice Answering Tough Questions
- When You're Called into the Office

The outcome of bargaining, or meet and confer, places responsibility for the outcome directly on the membership, not just on the negotiator. The Association's bargaining leverage or contract influence is in direct proportion to the other side's perception of our strength.

Management decides how to respond to negotiators based on whether they believe the membership is involved, and to what extent the membership is prepared to take collective action. Public officials also respond to the level of organization involvement and to whether they will gain or lose politically.

Campaign Budgeting

It's All About the Money!

**It's not enough to be right,
you also need might.**

BARGAINING/CONTRACT NEGOTIATION: INTERNAL METHODS

STEP 1. Identify the Objective

In a contract campaign, the obvious objective is to win the best contract possible for the membership. Identifying make-or-break contract issues is essential.

STEP 2. Gather Information

1. Survey the membership about contract and/or bargaining goals.

- One-on-one conversations
- NEA surveys
- Pencil and paper
- Online survey templates (such as [surveymonkey.com](https://www.surveymonkey.com))
- Listening tour



2. Research school district's positions and financial capacity.

- Political climate
- Cost data
- Budgets and audits
- Decision-making structure

3. Make comparisons.

- Emerging issues
- Past issues
- Districts/Locals of comparable size and financial situation

STEP 3. Develop an Action Plan

Members should clearly understand that bargaining and/or contract negotiating is being conducted by them, not for them.

1. Select a bargaining/negotiating team.

- Team size
- Diversity
- Constitutional provisions
- Appointed vs. elected
- Criteria for team members
- Responsibility
- Authority

Interest-Based Bargaining: Collaborative

This process encourages the parties to seek and find common interests of proposals, applying neutral standards in an attempt to reconcile their differences and reach common ground.

Traditional Bargaining: Confrontational

This process involves negotiating specific proposals to reach an agreement through the application of pressure, utilizing such techniques as counter-proposals, compromise, and trade-offs.

2. The team should agree on the philosophy about bargaining/contract negotiating.

- Interest based vs. traditional
- Collaborative vs. confrontational
- Single spokesperson vs. group discussion
- Historical impact
- The will of the members

3. Set bargaining goals.

- Establish the difference between goals and priorities
- Short-term objectives
- Long-term objectives
- What are the employer goals?



4. Plan for member involvement in the campaign.

- Consider the impact of bargaining on membership recruitment and retention especially given the many ESP job categories
- Analyze past member involvement: Who? How?

5. Create an issue theme.

- Concepts like "safety in the workplace" mobilize workers more than a "2% wage increase"

6. Organize support teams—communications, crisis, research, website, newsletter, issues, etc.

- Identify respected workers and volunteers at each worksite to organize/participate in support team activities
- Using one-on-one conversations, the teams survey the membership to identify issues and develop contract proposals

- The support teams ensure that workers know they "own" the issues campaign

7. Plan communication strategies.

- Internal or external
- Written vs. meetings or face-to-face
- Frequency of meetings/messages
- Detailed or general message
- Digital or print
- Social media



BARGAINING/CONTRACT NEGOTIATION:

External Methods

- Bring the community to the contract table—in a time when parents, community, and educators have less and less say in how their schools are run, the Union contract is one place where we can authentically give parents and community members a voice
- Don't define the community in strictly geographical terms. People are drawn together by common interests, not just because they live or work together
- Social media

BARGAINING/CONTRACT NEGOTIATION:

The Media Campaign

- Recruit among the membership the "poster child" members and prepare bios for release
- Train members on how to give interviews and stay on message
- Train members on how to put together a media package, how to write press releases, and how to do follow up after the release to ensure coverage
- Build relationships with the media/reporters months before they receive your first press release
- Use the time to educate them on the issues
- Examples of media tactics: ads in school football/basketball programs
- Meet with editorial board of newspaper
- Strategic press releases
- News conferences
- Free media: public service announcements, letters to the editor, public service airtime on radio or cable TV, radio call-in shows
- Social media

Campaign Planning

Campaign Planning Tools

- Local Association Campaign Planning Guide
- Choose Tactics that Fit
- Arrange Tactics
- Field Experience Toolkit
- Midwest Academy Strategy Chart
- Debrief Questions
- Wisconsin Education Association Council Tactics Manual

While individual organizing campaigns may serve different purposes—such as winning Union recognition and representation rights, increasing Union density by enlisting new members, electing pro-Union candidates to political office, establishing fair and effective accountability and performance standards, or achieving a decent contract—all organizing campaigns have the following common attributes:

- Start with an issue that resonates with members and the individuals and communities we are trying to reach.
- Follow a written plan that clearly states the immediate objective, its rationale, and relationship to achieving a larger long-term goal; how it will be accomplished and the leverage that will be used; a timeline with milestones and benchmarks; what members will be asked to do; and a work plan that specifies who will do what and when.
- Are conducted through a cohesive worksite structure characterized by a ratio approaching 1 trained worksite activist for every 10 unit members.
- Involve members by asking them in person and making participation easy.



- Record, update, and employ data for documenting member participation, measuring progress, and determining next steps.
- Draw from a common set of skills that includes list building, research, the organizing conversation, assessments, charting, mapping, leadership identification and development, and committee building.
- Employ strategies of escalating tactics for applying steadily increasing internal and external leverage to counteract opposition.

A winning strategy requires taking a comprehensive look at every internal and external source of leverage with the potential to affect the outcome of the campaign. Every prospective campaign should be viewed through a set of strategic considerations, such as member and community demographics, employer finances and governance, legal and regulatory environment, community and political power analysis, potential allies and opponents, affiliate readiness, and the role and likely impact of the media. It is an approach that requires research, education, and agitation for organizing and mobilizing our ESP members, potential members, and allies.

Building Power: The Campaign Debrief

Power Tools

- Power Is the Goal
- Building Full Capacity Locals
- Sketch Out a Member Network
- Taking the Conversation Online
- Remember the Basics

During any organizing campaign, “debriefing” your site or home visits or phone calls is vital for continuous improvement and building power. Yet many times we still don’t do it. However, if we don’t take the time to properly review each event, we may miss critical opportunities to identify mistakes and grow.

Here are 3 tips to help you design an excellent debriefing process that can ensure your campaign’s success and help you to continue to grow as you plan for future campaigns.

1. Set the Time(s)

Try to schedule your team debrief at the end of the day, following the site or home visits or phone calls. If this is not possible, try for no later than the next day. Timely debriefs can help detect if there are issues, enabling you to adjust before it’s too late.

The key takeaway? Debriefs are most successful when the details are still fresh in everyone’s mind. The longer you wait, the less you’ll recall and your learning could be severely impacted.

2. Set an Agenda

No one on your team should be asking, “What are we here to talk about?” A good debriefing session is not a directive—it’s a conversation. So make sure your colleagues in the room know what you’ve gathered to talk about. What do they need to prepare? What do they need to bring?

3. Learning, Not Finger Pointing

Always remember, a debrief is not a forum to complain. It is not an opportunity for people to air their dirty laundry and especially not to lay blame.

This is easier said than done, especially if things didn’t turn out very well that day. Emotions can run high and people can become defensive, but this can be a good thing. People get emotional because they care. They’re passionate about the work, have high standards for themselves, and are embarrassed if they perceive things weren’t



successful. Keep the debrief positive and focus on collective learning. Keep it grounded in the concrete details of the campaign...the what, how, and why. Start with the data and then talk about what happened, not who did it. Your path to answering the following questions will be much clearer.

1. What went well? What didn’t? Why?
2. What constraints or barriers did you face? How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the worksite?
7. Were you able to get to everyone given the different ESP schedules and worksites?
8. How can we do better in the future?

Debriefing your events is a critical part of your entire campaign planning process. In fact, it is likely one of the more important aspects of the campaign and one that it often overlooked. By taking part in an active learning process, you’ll be better equipped to lead a successful campaign and continue to build Union power.

Articulating issues or demonstrating proficiency in the basic organizing skills alone no longer guarantees successful outcomes. Employers, “right-to-work” front groups, and political adversaries run comprehensive campaigns that employ sophisticated research, targeted messaging, community outreach, judicial and political intervention, community pressure, and the media to defeat worker power. We should not be any less equipped to carry the fight.

Organizing for Community Support

Community Organizing Tools

- Sample Member Community Organizing Survey
- Sample Checklist for Potential Community Contacts
- Living Wage Questionnaire

Developing allies in the community should be a priority for every Association. Community groups, parent organizations, religious leaders, politicians, and others are more likely to stand with us if we have identified issues of mutual concern and if we have a history of working together.

Education support professionals are often active members of groups outside the school setting, from churches to political parties to volunteer organizations, and generally live within the communities where they work. Take the time to discover relationships that already exist between members and community groups. Members may live next door to or socialize with school board members or local politicians. They may be friends with local journalists at newspapers or radio and TV stations. We need to identify all relatives and relationships that our members have encompassing their respective school district. It is also important to identify all the connections that our members' close relatives and friends have to the communities where they live and work. Be especially mindful to determine parents and relatives who are vocal supporters of public education.

All of this information needs to be entered into your database. Being able to quickly identify sources of support will be vital in campaigns to pressure the employer to negotiate favorable contract terms or resolve workplace issues.



Make a list of all potential community groups where your members are stakeholders, such as:

- PTA/PTO
- Booster clubs for bands, sports, cheerleading, high school glee club, etc.
- Boy Scouts, Girl Scouts, boys' and girls' clubs
- Little League, Pop Warner, soccer teams, etc.
- Book clubs, cooking clubs, etc.
- Places of worship
- Other charities

Keep adding to this list and remember to expand your community reach beyond your geographical boundaries.

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The NEA Education Support Professional Quality (ESPQ) department has many additional resources for ESP members. Click on www.nea.org/esp for everything NEA offers for ESP careers.



Checklist for Deciding on an Issue

A good issue will meet most of these values.
Use this checklist to compare issues. You may decide to modify or add to this list.

<i>Issue 1</i>	<i>Issue 2</i>	<i>Issue 3</i>	Will the Issue:
			1. Result in a real improvement in the lives of students, school staff, and community members
			2. Give people a sense of their own strength
			3. Alter the relationships of power
			4. Be worthwhile
			5. Be winnable
			6. Be widely and deeply felt
			7. Be easy to understand
			8. Identify the decision-maker
			9. Have a timeline that works for your group
			10. Not be divisive
			11. Build leadership
			12. Be consistent with the group's values and vision in support of public education and public education employees



A GOOD ORGANIZING ISSUE...

- **...is widely felt.** How common is the problem? How many workers face this situation? Many people must feel that this is a real problem and agree with the solution you're pursuing.
- **...is deeply felt.** Is this an issue that people feel strongly enough about to actually do something? It's not enough that many people agree, if none are really hot under the collar.
- **...is winnable.** It's hard to know for sure whether you will win, but it's possible to have a good idea whether you can. Your group should match your demand to the power you've already got.

To win, you'll need to make it harder for the decision-maker to keep saying no than to say yes. The more pressure you can bring to bear, the more issues will become winnable.

- **...builds the union and builds leaders.** Consider how this fight will build your capacity for future fights. Will the issue attract leaders or groups who haven't been very involved? Will it build solidarity between groups? Will it give you the chance to try an action that's one step beyond what you've done before? Will the solution lay the groundwork for future improvements?

Each fight should build off the last. It often happens that we don't win the concrete gain wanted, but we do come out smarter and better organized—which makes it more likely we can win next time.





EXERCISE: EVALUATE AN ORGANIZING ISSUE

Have you started mulling over some possible organizing issues at your workplace? Pick one, and answer these questions to help you think through its organizing potential.

1. What's the problem?

2. What's our proposed solution?

3. Is this issue widely felt?

- How many people are technically affected by the problem?
- How many people feel like it affects them?

4. Is it deeply felt?

- How much do people care about the issue?
- What are they willing to do about it?

5. Is it winnable?

- Who's the decision-maker who could say yes to our solution?
- What would it cost this person to say yes? Consider not just the budget but also the decision-maker's personal or political investment in the issue.

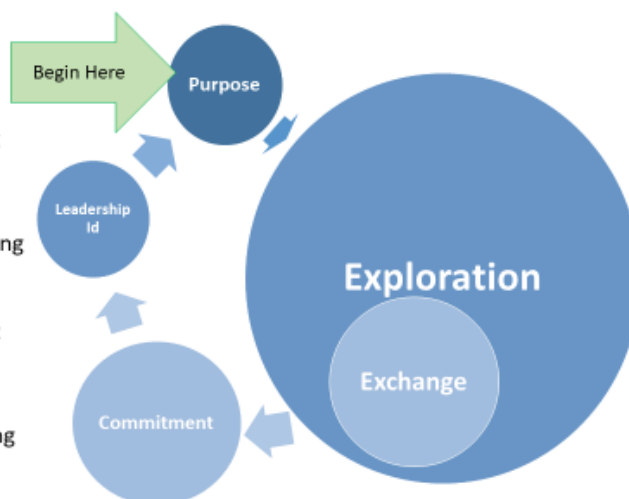
6. How much pressure will we have to bring to overcome this person's resistance?



Developing Your Script for One on One Conversations

Conversation Wheel

- **Purpose**
 - Let them know why you are meeting even before you get there.
- **Exploration and Exchange**
 - Most of the 1 on 1 is devoted to asking probing questions
 - So that we can exchange resources, stories, information, support, insight
- **Commitment**
 - We end with a commitment to start working together or continue working together.
- **Leadership ID**
 - Who here is trusted and respected



Example of a Relationship Building Script (Based on 25 Minutes)

Purpose VERY BRIEF 1 minutes:

Hello my name is _____. I am with the _____. I am excited that we could meet today to talk about _____. We scheduled (amount of time) so I want to jump right in. (In your Script think about 2 or 3 BRIEF sentences about you that allow you to be more relatable – for example what are your values related to this conversation, purpose for your work, who you are working with.)

Exploration and Exchange 80% OF THE CONVERSATION 20 Minutes:

Exploration -Ask probing questions to learn about the other person's values and interests, as well as resources they might hold. In response, it's up to you to share enough about your own values, interests, and resources so that it can be a reciprocal exchange – relatable. But remember the focus is on them.

Start by asking questions like:

- "Why is this issue important enough for you to act?"
- "Can you remember the first time you stood up for something you believed in?"
- "Did you always feel strongly about this issue? Why / why not and what changed that?"

Exchange -once you have an understanding of their story and motivations, briefly share yours. Wherever you find similarities between their story and yours, make a connection.

Commitment 3 Minutes:

A good one on one meeting ends with a commitment to work together. This commitment is best secured through a direct ask:

- Stress the urgency of the commitment you are asking for:
"Your colleagues need more people like you to join them in making this school a better place to work"
- Emphasize the values you have in common:
"To achieve a better place to work we both know it is going to take hard work and standing together."
- Frame it so that it seems the person you're asking is the solution to the problem:
"Would you join the union today to help your colleagues make this a better place to work?"
- Be specific, make sure they understand what it is you are asking them. Provide time and space for them to ask questions until they're clear.
- End the meeting with an understanding of next steps – that is, they should leave knowing the next time you will meet or how and when they will hear from you

Leadership Identification 1 Minute: Who here is trusted and respected?

Building Relationships

Key Concepts

- The **1:1 meeting** is a key tool for establishing and maintaining relationships; there are three types of 1:1s – recruitment, maintenance, and escalation.
- A **“hard ask”** is an effective way to ask for a commitment to establish a relationship.
- **Recruitment and retention best practices** can significantly increase the rate at which new people join and stay on your team.

Why Build Relationships?

Again, we define organizing as leadership that enables people to turn the resources they have into the power they need to make the change they want. Power comes from our **commitment** to work together to achieve common purpose, and commitment is developed through relationships.

“Organizing is a fancy word for relationship-building.”

– Mary Beth Rogers

Building Intentional Relationships

Relationships are rooted in shared values. We can identify values that we share by learning each other’s stories, especially “choice points” in our life journeys. The key is asking each other “why?”

Relationships are long term. Organizing relationships are not simply transactional. We’re not simply looking for someone to meet our ask at the end of a 1:1 meeting (read on for what this means) or house meeting. We’re looking for people to join with us in sustained, long-term growth and action.

Relationships are created by mutual commitment. An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time. Because we can all grow and change, the purposes that led us to form the relationship may change as well, offering possibilities for deeper relationships or more enriched exchange. The relationship itself becomes a valued resource.

Relationships involve consistent attention and work. When nurtured over time, relationships sustain motivation and inspiration and become an important source of continual learning and development for the individuals and communities that make up your organizing campaigns.

The 1:1 Meeting

The 1:1 meeting is a tool to establish, maintain, and grow relationships in organizing. Each 1:1 meeting has four key pieces:

Purpose – Be up front in establishing why you are meeting in order to make sure you are both on the same page. If you plan to ask the person you're meeting with to make a commitment at the end of your 1:1, it is appropriate to let them know when you set up the meeting and remind them at the beginning of your meeting, so that they aren't caught off guard.

Exploration – Most of the 1:1 is devoted to exploration by asking probing questions. If you are meeting a person for the first time, ask questions that help you understand their story, values, and resources that may be relevant to your shared purpose (e.g. knowledge or skills they may have). If you already have a relationship, ask questions that help you understand what's going on in their life, or the challenges or success they are experiencing in their organizing.

Exchange – We exchange resources in the meeting such as information, support, and insight; you may connect your stories or provide coaching on a challenge. This creates the foundation for future exchanges.

Commitment – A successful 1:1 meeting ends with a commitment to start working together or continue working together.

Three Types of 1:1 Meetings

There are three types of 1:1s that you will use or engage in in your organizing relationships.

1. Recruitment 1:1

These meetings happen at the start of a relationship to connect you and a new organizer and establish a connection based on shared goals and values. The goals of the recruitment 1:1 are to make a personal connection, use your personal story to identify and gauge potential and interests, probe for a shared experience and connect on values, and lastly, pivot to engagement – that is, move the volunteer to action based on what you've discussed. Think about the volunteer's aptitude, skills, and connections when considering how to best engage them.

See page 18 later in this section for a sample recruitment 1:1 meeting agenda.

2. Maintenance 1:1

These meetings should occur regularly between you and each of your organizers (assuming that you are in a leadership role in your team or snowflake). This is an opportunity to catch up on a personal level, debrief recent actions taken by the organizer and their team, and offer coaching. Maintenance 1:1s should be scheduled regularly and proactively: do not wait for a problem to occur to schedule one. A good guideline is to schedule a maintenance 1:1 every two weeks.

3. Escalation 1:1

These meetings are for organizers who are ready to take the next step on the "ladder of engagement" in assuming more responsibility and taking on ownership of goals (see the Structuring Teams section for more information on the "ladder of engagement"). First, recognize the accomplishments the organizer has already made, then propose the idea of taking on this new leadership role. If all goes as planned and the organizer accepts, take the time to clearly lay out the responsibilities and expectations for this new role.

Because every organizer has a limited amount of time, and maintenance 1:1s need to happen regularly, each organizer has a limit to how many relationships they can maintain. See the Structuring Teams section for information on "sustainable relationship ratios."

Maintenance 1:1s are the primary opportunity to coach an organizer. See the Coaching section for more information on how to approach coaching.

Hard Asks

When you ask someone to make a commitment – for instance, attend an event or take on a new role – it's important to make an effective ask, or what we call a "hard ask." A hard ask is an ask that results in a commitment to a specific action. Here are some best practices for a hard ask:

- Ask in **concise, plain, and specific language**.
 - » Example of an effective hard ask:
"Can you come to our team meeting next Wednesday at 6pm at Alisha's house?"
 - » Example of an ineffective ask:
"Would you be interested in coming to a meeting at some point to meet the team and talk about how you might want to get involved?"
- Never apologize for asking: organizing is an opportunity, not a favour. Sometimes we feel badly for asking someone to take action because we feel it is an inconvenience, when really, we're providing the person we're asking with an **opportunity** to take action.
- Don't ask them to commit to something general; instead, **have a specific event or role in mind**. If it's an event (e.g. a canvassing event or house meeting), include the date, time, and location in your ask.
- **Convey urgency**: Describe an urgent problem and how the person you are asking is the solution to the problem.

Three Types of No

When securing commitment, it's inevitable that our hard asks will sometimes be met with "no." In organizing, there are **three types of "nos"** that you will encounter – "**not now**," "**not that**," and "**not ever**" – and being attuned to the difference will dictate how you proceed with the person you're asking.

If someone says "no" they might mean "not that time," so try offering another time or date. For example:

"Can you come to our next team meeting on Monday at 5PM?"

"No, I have to work then."

"No problem, we have another meeting next Sunday at 1PM, can you come to that?"

If someone says "No, I don't want to do that," it probably means "not that." Try asking them to commit to something else. For example:

"Can you come door-to-door canvassing with us on Tuesday at 5PM?"

"I don't know if I feel comfortable going door-to-door, I've tried it before and found it really intimidating."

"That's okay! We are also planning an event to recruit new volunteers for the end of the month. Will you come to the planning meeting for that on Sunday at 1PM?"

If someone says definitively “No, I’m not interested in doing more” or “No, I don’t want to join the team,” then don’t worry about it! Thank them and move on. For example:

“Can you come door-to-door canvassing with us on Tuesday at 5pm?”

“No, I am too busy right now to take on anything else, I’m sorry!”

“That’s okay, thanks for taking some time to talk with me. Have a great day!”

Sample Recruitment 1:1 Agenda

The following is a sample recruitment 1:1 meeting agenda. Reminder here that this is a framework you can follow, not an exact formula for what you must do in a 1:1.

Purpose (2 minutes) – Be up front about your purpose for the meeting (e.g. “Our team needs a new canvass lead.”), but that first, you’d like to take a few moments to get acquainted.

Exploration, Connection, and Exchange (20 minutes) – Most of the 1:1 is devoted to exploration by asking probing questions to learn about the other person’s values and interests, as well as resources they might hold. In response, it’s up to you to share enough about your own values, interests, and resources so that it can be a reciprocal exchange. Start by asking questions like:

“Why is this issue important enough for you to act?”

“Can you remember the first time you stood up for something you believed in?”

“Did you always feel strongly about this issue? Why / why not and what changed that?”

Once you have an understanding of their story and motivations, share yours. Wherever you find similarities between their story and yours, make a connection.

Commitment: A Hard Ask (10 minutes) – A successful 1:1 meeting ends with a commitment to work together. This commitment is best secured through a hard ask:

- Stress the urgency of the commitment you are asking for:
“We need another canvass lead to enable our team to meet our target.”
- Emphasize the values you have in common:
“To achieve the change we want we need to meet our targets.”
- Frame it so that it seems the person you’re asking is the solution to the problem:
“Will you take on the role of canvass lead?”
- Be specific, make sure they understand what it is you are asking them. Provide time and space for them to ask questions until they’re clear.
- End the meeting with an understanding of next steps – that is, they should leave knowing the next time you will meet or how and when they will hear from you.

In this portion of the 1:1, you are trying to get them to share their Story of Self with you, and then to share your story to build a Story of Us. See the Telling Stories section for what this means.

Best Practices for a 1:1

Do	Don't
Schedule a time to have this conversation (usually 30-60 minutes)	Be unclear about purpose and length of conversation
Plan to listen and ask questions	Try to persuade rather than listen and ask questions
Have a plan for your meeting – give context or purpose, connect with one another, and secure commitment	Chit chat about your interests
Share experiences and motivations	Skip stories to 'get to the point'
Illustrate a vision that articulates a shared set of interests for change	Miss the opportunity to share ideas about how things can change
Be clear about your next steps together	End the conversation without a clear plan for next steps
Split the bill if you meet in a coffee shop or restaurant	Pay for the whole bill (note: it can make the relationship feel transactional and can get expensive in the long run!)
Meet in public unless you know them well (e.g. a coffee shop or public park)	

Recruitment & Retention Best Practices

Employing best practices can significantly increase the rate at which new people join and stay on your team. Here are some key best practices to keep in mind when building and maintaining relationships:

- Don't be apologetic: organizing is an opportunity, not a favour. When asking for commitment, be enthusiastic.
- Always Follow-Up: When someone offers to get more involved, ask for their contact information and give them yours. Follow up with them as soon as possible, ideally within 48 hours.
- Always schedule for the next time: don't let anyone leave without asking when they'll be coming back.
- Confirm commitment: use a hard ask and make sure your people understand that you are counting on them.
- Plan for no-shows: assume that half of your people will turn up. For example, if you need four people for a successful event, plan on scheduling eight.
- Design actions that are empowering to participate in.

Designing actions so that they are inherently motivational is a key way to keep people engaged. See the Acting: Targets & Timelines section for information on "motivational engagement."

In organizing, it's up to us to create welcoming, organized spaces and engage volunteers so that they keep coming back. The following is a list of top reasons why volunteers don't return:

- They don't feel it is worth their time
- Atmosphere is disorganized and they don't feel they're receiving attention or direction
- No one explained why the work they are doing is important
- They are uncomfortable doing what they have been asked to do
- They feel overwhelmed by tasks and goals
- The volunteer environment is unwelcoming
- No one recognizes their contribution
- No one asked them

To summarize, building strong, resilient relationships is critical for effective community organizing. Our power stems from our commitment to one another and to taking action together, and the hard ask, the 1:1 meeting, and best practices for recruitment and retention are key ways we can secure commitment in our work.

Thinking About Organizing Conversations – A.K.A. – One on Ones

Organizing Through the Anxiety by Max Belasco, UPTE-CWA for "The *Strikewave* Editorial Collective"

Imagine this for a minute:

You're representing your local at a day long new staff orientation. Your contract gives you fifteen minutes to talk about the union, sign members up for mailing lists, and get as many in the room interested in coming out to the next meeting. Management has "unintentionally" gone long in the driest HR presentation you can imagine, and warms the room up for you by saying that once the union representative is done everyone can break for lunch. By the time you're up, you've got ten minutes and the crowd is looking at the clock more than you. Who are you, trying to talk contracts and grievances and putting their lunch off?

Or maybe think about this scenario: you need to visit a building on campus filled with workers notorious for being evasive and difficult to reach. You're in contract negotiations, and you need to get folks to sign commitment cards saying that they'll keep paying their dues for the coming year. There are some in the building that are friendly to your union, but there are more than a few that won't greet you warmly. You've got to prepare for coworkers demanding that you leave the building, along with some very aggressive managers who will threaten to call security if you dare to talk to their workers while they're on the clock.

If you're at all like me, either of these situations makes your stomach turn. I vomited after my first visit encountering workers hostile to our union. I'm an introvert by nature; I've been struggling with social anxiety for most of my adult life, and I'm normally very conflict-averse. Many of our union kin are in the same boat, and some still don't seem to understand why I wanted to start engaging members and take on the duty of being a steward for our local. They certainly don't believe me when I explain to them that I find the experience empowering and therapeutic.

The first dozen times I did site visits or presentations to new staff were some of the hardest experiences I've had at work. Having conversations with dozens of complete strangers on a regular basis, and getting asked very specific questions about HR and the grievance process, all the while trying to look more authoritative and trustworthy than management, is a nerve wracking experience. What if I give the wrong information, mess up someone's case, embitter them and their coworkers forever to the union? What if I lose this whole orientation crowd and nobody attends our new member meetings? What if someone more experienced could have handled that conversation better, won that member over, and my failure to do so is just hurting my union?

But it started to change for me when I first learned to have organizing conversations. Conversations with strangers, inside or outside a union context, are frightening to me. I'm terrible with small talk and I never know what to say. I thought organizers had to be charismatic and witty, charming members into attending meetings. It never dawned on me that there was a structure to the way organizers would have conversations with those they are organizing: a structure that guides someone into becoming more involved in building their union. Once I learned that organizing conversations have a natural arc and you can use this to identify a coworker's issues, agitate them by validating their concerns, get them to lay the blame at the feet of the boss, and then have them commit to take action to resolve the issue, I started picking up some lessons I use for every social situation.

Of course, organizing conversations aren't exactly like conversations you have with friends and family—it's poor form to bring a petition or union cards for everyone to sign at Thanksgiving. But I've found what makes for a good organizing conversation also makes a good conversation in general. Trying to discover my coworker's issues made a lot more patient and deliberate in my listening to any conversation partner, making me focus on asking

questions rather than scrambling for something clever to say. Don't get me wrong: I'm still terrible at small talk. But I feel my conversations in general have gotten much more thoughtful and clear since I started adopting lessons from organizing conversations.

When I first started canvassing buildings I found success agitating coworkers once I found out what issues bothered them the most, but earning a commitment from them to come to a meeting seemed impossible to me. Part of it was just not wanting to be rebuffed by a lot of coworkers about union work, but another part of me was worried that maybe I was pushing people too much out of their comfort zone. What if I was demanding too much, and actually coming off as a jerk?

I remember sharing this concern with a more experienced union member, and his response to me is something of a mantra now—"Don't make decisions for your coworkers." An organizing conversation is an invitation you give your coworkers to take a more active role in building their power in the workplace. They may say no, but if you never ask you deny them that opportunity to make that decision for themselves.

I'm not saying that every introvert should brave their anxiety and other inhibitions to become a steward, or dive head first into organizing conversations. They're challenging and can be emotionally taxing, and it took years of practice for me to get competent at them. However, they're also structured, and that structure keeps me centered when I'm organizing in a way I don't find in other social situations. I doubt that I'd have the handle on my own social problems that I have now if I didn't learn organizing conversations as a technique.

Talking with your coworkers is hard. Having a weak union—or no union—is much harder. The way we build power is by learning to trust each other, and you build that trust one conversation at a time. Make sure that you know your own limits, but don't think being a good organizer is contingent on being a social butterfly.

Max Belasco is a rank-and-file member of UPTE-CWA and a member of the StrikewaveEditorial Collective.

Bad Habits of Listening Checklist (for self or others)

The following is a list of ten bad habits of listening. Check any of the listening bad habits that you are sometimes guilty of committing when communicating with others. Be honest with yourself!

- I interrupt to try to finish the other person's sentences.
- I jump to conclusions.
- I am often overly parental and answer with advice, even when not requested.
- I make up my mind before I have all the information.
- I am a compulsive note taker.
- I don't give any response afterward, even if I say I will.
- I am impatient.
- I lose my temper when hearing things that I don't agree with.
- I try to change the subject to something that relates to my own experiences.
- I think more about my reply while the other person is speaking than what he or she is saying.

***If you have someone you trust have them fill out this form for you sometime, from their perspective. It can be a very enlightening and positive experience.

Communication Shutdowns

This list is made up of common phrases people use that tend to shut down conversations and communication. If not prepared for this it can create major barriers.

Come up with examples of questions or statements you can use to direct/redirect, move towards a positive outcome or help discover the obstacles that this person feels are in the way.

1. Don't be ridiculous
2. It'll cost too much.
3. That's not my responsibility.
4. We don't have time.
5. We've never done that before.
6. That's not the way we do things around here.
7. If it ain't broke, don't fix it.
8. We're not ready for that.
9. You can't teach an old dog new tricks.
10. It will never sell.
11. We will become the laughing stock of the community.
12. We tried that before and it didn't work.
13. It simply can't be done.
14. It's too radical of a change.
15. That will make our current equipment obsolete.
16. It's not really our problem.
17. Let's get back to reality.
18. I need to go over the numbers again.
19. Let's put a pin in that for now.
20. It's not in our budget.
21. We have done alright without it all this time.
22. It won't work here.
23. Okay, but if it doesn't work, you're the one who's going to get the blame.
24. I don't personally agree, but if you insist.
25. Are you crazy?

Recovering Information – Asking Questions to Understand

We often generalize when speaking, and in doing so, leave some information out. Recognize when generalizations are being used, and recover the missing information or reasoning with questions.

Generalizations	When You Hear:	Ask:	Find the Reasoning
Universal words	Every, all, never, always, etc.	“Every time?” “All of the group?”	What is the size, frequency, scope of the issue?
Restriction of possibility	Can’t, impossible, unable	“What stops you?” What would happen if you did?”	What barriers do you perceive?
Statement of necessity	Have to, necessary, must	“Or what would happen?” What would happen if we didn’t?”	What consequences do you fear?
Nominalizations Words that label a process as a thing or category	“No communication” “Lack of Transportation”	“How would you like to?” “What doesmean to you?”	How specifically does this category affect you?
Unspecified nouns and verbs	“Costs are rising” “Work is harder”	“Which costs” “Compared with what?”	What specifically does this category represent for you?
Simple negatives	Not sure, not happy	“About what in particular?”	“Find out where the discomfort arises”
Lack of reference	They aren’t happy, It happens all the time	“Who specifically?” “To you or to someone you know?”	Try to distinguish personal experience and the experience of others’ in circle of reference

Some Tips for Overturning Objections

- Keep asking. Make the potential member your project until he or she joins.
- If a potential member attempts to get you to argue or defend your position, respond with a question or offer to provide more information.
- Listen to what the potential member is saying. Continue to use listening skills while the person fully expresses his or her objection.
- Refrain from giving an immediate response to an objection.
- Keep the potential member talking after he or she has raised an objection. Ask open-ended questions that reflect on what the potential member said. This helps the person “talk it through” without your arguing or defending.
- Determine if the potential member is firm in his or her objection by observing if he or she sticks to it.
- Listen carefully until it is your turn. Then check out your statement of what you believe the objection is before you respond to it. (People often want to merely get something off their chests. In that case, just hearing them out is all that is required.)
- Share your own reasons for joining. An enthusiastic member is the best person to promote the organization.

The following are some of the most useful techniques for responding to objections:

- “That was yesterday. What can we do about it now?”
- “What should we start doing?”
- “I’ll accept that.”
- “Even if that were true...
 - what can we do to change it?”
 - what better option do we have?”
 - what better option have we than to work together?”
 - how about giving us a chance?”
 - why don’t you join us to change it?”
 - why don’t you join sides with the rest of us?”
 - I believe it’s the best thing we have going.”
- “I hear what you are saying.”
- “I understand.”

Overturning Some Specific Objections

Recruiters will be most successful if they follow the listening techniques already explained and illustrated. Their own, personal answers to questions are very likely to be the best ones to use.

Experience has shown that some questions arise again and again in all jurisdictions, all sections of the country, among all employee classifications and in local affiliates of every size.

The pages immediately following deal with 12 of the most often heard objections. We offer a number of possible responses to each objection. These are merely guides. We include them to help you along in your training session. Do not substitute them for personal ingenuity and creativity and certainly not for answers that prospective members themselves suggest in conversations with the recruiters.

Recruiter's own personal answers to questions are very likely the ones to use, but take time to consider the suggested responses to common objections.

Objections and Responses

1. "Membership costs too much. I can't afford it."
2. "Why should I join? I get the benefits for nothing."
3. "I don't agree with _____ of the Association."
4. "I'd join the local (or local/state) but not NEA."
5. "I don't like unions."
6. "We shouldn't be involved in politics."
7. "The Association doesn't do anything for kids and education."
8. "My spouse is a member. I don't need to join."
9. "I don't like (past or present) leaders."
10. "We don't need to be members this year." (non-bargaining year)
11. "I'm disgruntled because of what happened in the past."
12. "I don't know how long I'll be working here." (retiring soon)

Objections and Responses

(Continued)

1. "Membership costs too much. I can't afford it."

- "How can you afford not to?"
- "You pay only ____ a pay day (week). What can you buy for only ____ a pay day (week)?"
- "The cost of membership is less than the cost of a Big Mac, (movie, a six pack of beer...)." Equate the daily amount to an item it would buy.
- "Money is tight for most of us. We're all on the same salary schedule. Those of us who join think the benefits outweigh the cost."
- "Membership can actually save you money if you take advantage of NEA Member Benefits opportunities." Show how members save money through NEA Member Benefits group buying.
- One recruiter placed a copy of his first pay voucher alongside a current voucher on a sheet of paper to show how much he'd gained in salary over the years. On the same sheet of paper he wrote, "Thanks, to a large extent, to the Association's efforts."
- Cite salary increases over recent years and credit Association lobbying and bargaining efforts. Show that dues are a good investment.
- List protections and benefits members get 365 days a year for just \$____ per day in dues, such things as lobbying at the state and federal levels, contract enforcement, bargaining, defense in legal cases.
- "What if you lost your job? You will need the Association to represent you more than ever if you need your salary, medical insurance, and retirement credit from you job."
- "If you needed an attorney to defend you against charges such as child abuse, how would you pay the bill?"
- Remind NEA-Student Program members that their membership dues entitle them to a credit that will be deducted from their dues when they join NEA as active members after graduation.
- Equate dues to an investment.
- Remind NEA Retired members that their membership keeps them protected and involved.
- "You aren't buying services, you're buying into a cooperative."
- "You don't wait until your house is on fire to buy fire insurance." Equate paying membership dues to buying insurance.
- NEA Dues Tab provides life insurance in the amount of your dues for continuous membership.
- Personalize your message by using a member who is a single parent, new employee, or veteran member who has never had to actually "use" the organization.

Objections and Responses

(Continued)

2. “Why should I join? I get the benefits for nothing.”

- “No one gets the benefits free. Your colleagues at the local, state and national levels are paying the tab.”
- Make a list of what non-members don’t get.
- Members pay dues that cover the cost of representation and bargaining for all bargaining unit members and potential members (in units that don’t have fair share provisions where all employees pay for the costs of representation.) In addition, dues payments entitle members to vote, hold office, attend meetings, voice their concerns, and be represented on all work related matters. It also entitles them to liability insurance and buying privileges reserved for members.
- “It costs money to represent employees.”
- “The time has come when members can no longer carry the financial burden of others who have failed to make the commitment to their profession. Those who oppose public education and public school employee organizations have joined forces. We can afford to do no less.”
- “We should all be working together to make our organization the very best it can be at representing all of us.” (for locals that do have fair share or agency fee agreements)
- “When you remain a potential member, you are actually working against your colleagues.”
- One Association sends a “bill” to potential members each month to ask them to join and to remind them that it costs money to represent them.
- “As a member, you can take an active part in decision making. You can vote, hold office, and have a voice in a democratic, representative organization.”
- “If something happened to you and you needed the Association, it would be too late to join and obtain the assistance automatically provided to Association members.”
- “If everyone felt as you do, the Association would not exist and you would not be able to receive these benefits.”

3. “I don’t agree with _____ of the Association.”

- “Few people agree 100 percent with the actions or positions of any group or organization. But representative government in organizations - as well as nations - depends on people who “pay their dues” and who participate in decision making. If you don’t agree with some direction the Association is taking, join, become active and work to change its course.
- “Our Association is democratic. No member is required to agree with the majority on any issue. But every member has a chance to try to sway the majority through representative democratic governance structures. Furthermore, our representative bodies issue the recommendations of the majority. The Association doesn’t attempt to speak for every individual member in every decision.”

Objections and Responses

(Continued)

- “What if taxpayers in the district could elect not to pay taxes because they objected to something or because they do not have children in public schools or universities?”
- Emphasize the democratic nature of the organization and that the Association respects the opinions of those in the minority.
- Compare membership dues to taxation and services such as water, fire-fighting, trash collection, parks, security. Each taxpayer pays his or her share even when he or she may disagree or not make use of some services.
- “Each year the NEA Representative Assembly (RA) holds open discussions on resolutions that members initiate. The RA votes on them.” Introduce the prospective member to his or her local representative who was a delegate to the RA.
- Review the NEA Resolutions (available to every member in the September issue of the all-member *NEA Today* and in the *NEA Handbook*, available in each UniServ office). Have a member of the Resolutions Committee from your state contact the potential member.
- “How can you get involved, be informed, or work for change if you don’t join? Wouldn’t joining and working for change be more effective than staying on the outside and complaining?”
- “Some positions that the Association takes do not affect us on a day-to-day basis. The advantages of membership far outweigh the disadvantages of one or two things with which we may disagree.”
- “Our enemies distort our positions.” Explain the distortions, emotional issues, and tactics of the radical right.
- “Public education is at stake.”
- If the objection is to our protecting a “bad” employee, point out that it is our responsibility to make sure each employee has a “day in court.” Point out that rights, like laws, must be enforced for each individual or they will not exist for anyone. Cite cases.
- “Do you agree with everything the legislature does? But you don’t drop your citizenship, give up the right to vote, or refuse to pay your taxes just because elected officials take positions with which you disagree.”

4. I’d join the local (or local/state) but not NEA.

- The NEA family - local, state, and national affiliates - works constantly to protect, promote, and strengthen member rights through a variety of avenues.
 - UniServ
 - Legal services
 - Professional development
 - Research
 - Bargaining assistance
 - Benefits

Objections and Responses

(Continued)

- Human and civil rights
- Staff assistance at conferences and workshops
- Offices and office supplies
- Shared projects
- Show the Association's budget.
- "Who represents you as a delegate at all levels of the Association?"
- "How would you be affected if a colleague had a problem and no one had resources or simply chose not to help your colleague? Precedents set in other cases help protect all of us."
- Demonstrate how the NEA resolutions and budget are taking new directions. Explain politically motivated efforts to separate members from leaders, local affiliates from state affiliates, and national affiliates from the national.

5. "I don't like unions."

- "What do you think of when you say union?"
- Use dictionary definition of union: join together for a common cause.
- Cite professional development, community action, child protection, help for parents, and workshops and conferences on professional issues ranging from stress and discipline to school safety, technology, and teacher quality.
- "What would be the effect if there were no union to monitor, lobby, represent, enforce policies and contracts, and ensure due process?" Cite local, state and national records.
- "Our activities are common to both unions and professional associations."
- The unions role is to work to improve education and to guarantee that everyone's rights are respected.

6. "We shouldn't be involved in politics."

- "If we want to have an impact on the resources that are available to our schools and students, we must recognize that people elected to public office control those resources."
- "If we want modern schools, qualified teachers, and computer-equipped classrooms, we need to have people in public office who regard these as priorities. If we're not involved in politics, public education may not be a priority."
- NEA does not use dues to make direct contributions to candidates in federal elections. (Add state and local rules and practices.)
- Education employees make recommendations regarding support for candidates for public office through a fair and open process.

Objections and Responses

(Continued)

7. “The Association doesn’t do anything for kids and education.”

- “The Association is focusing its efforts on ways to enhance teacher quality and improve student achievement.”
- “What should we be doing?”
- “What are you willing to do?”
- Share information about local, state, and national activities to promote quality education and benefit students.
- Share information on teaching and learning initiatives.
- Share information about new unionism.
- Share information about the \$1 per member per year of NEA dues set aside to support the National Foundation for the Improvement of Education.
- Point out the Association’s many professional development and outreach activities; grants and scholarships, workshops, publications, professional standards, activities for American Education Week, National ESP Day, Teacher Day, and Read Across America.
- Point out the resources available through the NEA website www.nea.org, such as “helpfrom.nea.org,” and the new member CD-ROM, “It’s All About Kids.”

8. “My Spouse is a member. I don’t need to join.”

- “How many salaries do you and your spouse get? If one of you is a member, only one of you will get the benefits of membership - liability insurance and representation, for example.”
- “It’s true you both can read our publications, but the percent of dues that goes to publications is minimal. So much more goes into other vital services that benefit every member.”
- “Anti-public education attacks and anti-education employee actions affect both of you. Association activities that counter these attacks help both of you.”
- Note other couples who are both members.
- “Both of you get salary increases and bargained benefits.”
- “Could either of you afford to pay for attorneys to defend yourself?”
- “There are special needs of special groups at the work-site level.
- “The school system did not hire you because you are a couple. Each of you must stand on his or her own.”

Objections and Responses

(Continued)

9. “I don’t like (past or present) leaders.”

- “Get involved and help change things.”
- “It’s understandable that some people don’t like some people.”
- “They are volunteers.”
- “The way to influence the Association and its leaders is to join and participate.”
- “They are elected by means of open nominations and secret ballot by majority vote.”
- “That was yesterday. What should we do about it now?”
- “What should we start/stop/continue doing?”
- “Whom would you suggest as a better leader?”
- If the prospective member is speaking of a current leader, ask him or her to follow up.
- Take the prospective member to a meeting with you.

10. “We don’t need to be members this year.” (non-bargaining year)

- What happens in neighboring districts and states affects us when we bargain next time - rollbacks, strikes, arbitration, legal cases, unfair decisions, for example.
- Programs go on all the time:
 - Teaching and learning initiatives
 - Research
 - Training of leaders and bargaining teams
 - Office maintenance
 - UniServ
 - Lobbying
 - Monitoring of state and federal agencies
 - Monitoring of retirement funds
 - Legislative programs
 - Community relations
 - Public relations and employee image programs
 - Contract enforcement

11. “I’m disgruntled because of what happened in the past.”

- “What are you willing to do to change that?”
- “That’s history. What do we need to do now?”
- “I understand that.”
- “You’re right. Now what can we do?”
- “Nothing can change that. Now we are...”

Objections and Responses

(Continued)

- “I know it.”
- “We’re working this year so that we will be strong next year.”
- If the problem is a poor record in the past, especially in bargaining, acknowledge it if it’s true. Then move the potential member to join to help improve the situation or cite positive gains in the most recent bargaining. “We’re making improvements now.”
- “We didn’t have the benefits of your participation in the past. What can you do to ensure better results next time?”

12. “I don’t know how long I’ll be working here.” (retiring soon)

- “Your retirement income depends on salary gains these last years. We need your support to get maximum gains.”
- “Retired people have the greatest need of all for these vital protections and services. The Association monitors such things as retirement funds and insurance.”
- “Join now and stay involved through NEA Retired. You’ll not only remain a vital part of education, but the Association will continue to work 365 days a year to protect your investment and your future.”
- “For now, join the group and build unity. Get to know your colleagues.”
- “You’ll benefit from the support of other Association members.”

COACHING 101

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



ACKNOWLEDGEMENTS

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.

The coaching framework is from the work of Ruth Wageman and Richard Hackman, and the full framework can be found in Wageman, 2010 "Toward a framework for coaching" Working Paper, Harvard University, and in Hackman and Wageman, (2005). "Toward a theory of team coaching," Academy of Management Review, 30, 269-287. Adapted here by Hope Wood, New Organizing Institute.

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COACHING: FROM EXTERNAL CONTROL TO GROWTH

OBJECTIVES:

By the end of this training, you will...

- Learn a simple diagnostic framework and a 5-step process for coaching others in organizing efforts
- Practice the coaching process through role-plays and reflective discussion
- Learn to build a culture of coaching into your team

Why is coaching an important organizing practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching, put simply, is the act of enabling 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. Some examples of when coaching skills are necessary:

- Preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.
- Facilitating the goal setting of a leadership team struggling with common understanding of the goals
- Debriefing with a leader who has not kept a commitment
- Helping a leader overcome motivational challenges with managing volunteer teams in the field
- 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.

Effective Coaching Is	Effective 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 coaches before you even hear or observe their challenges
- Helping the coaches explore and make sense of their challenges and successes and what they learned from it all	- False praising of the coaches or only focusing on their strengths because you do not want to hurt their feelings
- Helping the coaches to find solutions to challenges	- Solely criticizing the coaches for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coaches what to do

How do I practice coaching in organizing?

Good coaching requires learning how to identify a person's or team's strengths and weaknesses in order to find ways to help them mobilize their strengths to overcome their weaknesses. People often know what they "should" do, but a fresh set of eyes is helpful in diagnosing the specific challenges they're facing and initiating a brainstorm of solutions to maneuver through them. There are three basic practices of coaching:

Basic Practices of Coaching:

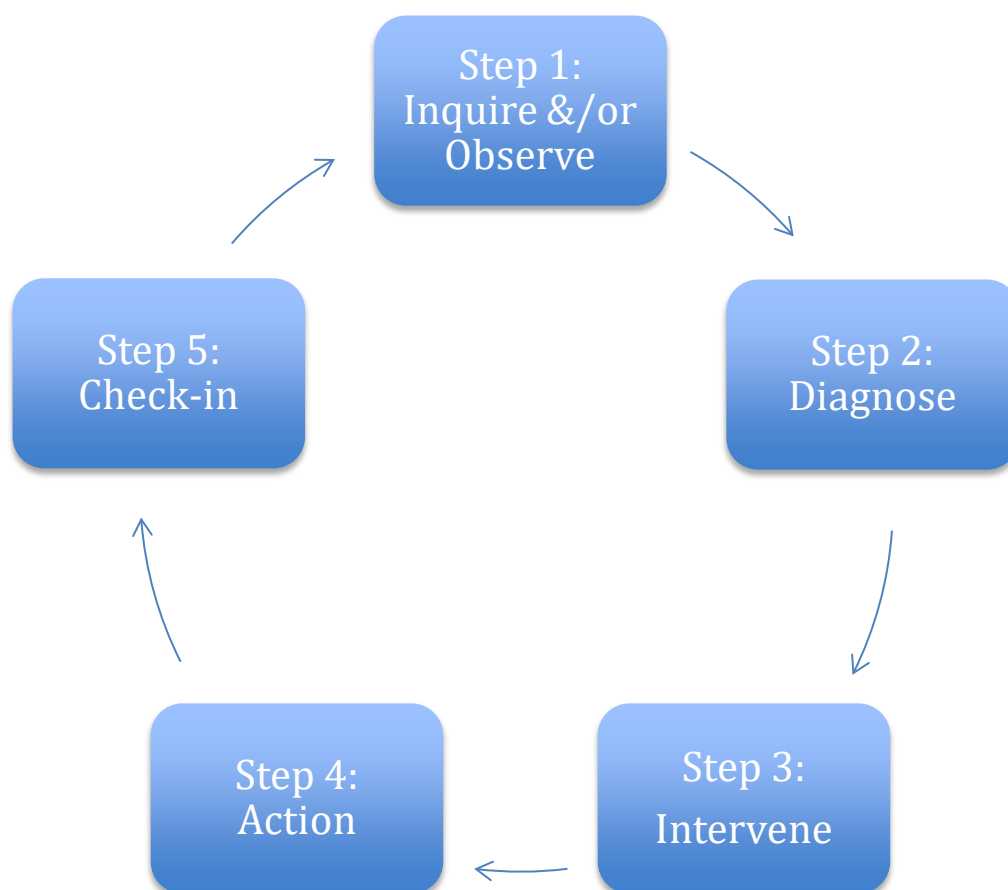
- **Motivational (heart) coaching** is aimed at enhancing *effort*.
- **Strategic (head) coaching** is aimed at helping the team or individual plan, evaluate, or think about its *strategic or structural approach*.
- **Skills-based (hands) coaching** is aimed at helping the team or individual *execute with skill* (and learn from execution).

The first part of effective coaching is diagnosing which coaching practice is most needed in any given moment. For example, if an organizer is struggling with strategy but you try using motivational coaching, it is likely to frustrate them further.

As is true for the other practices of leadership, coaching is a practice that only gets honed by DOING, and then reflecting on what works and what doesn't.

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? How will I intervene?

		
If your diagnosis is that the individual needs to put in more intense effort, choose a <i>motivational</i> intervention, – for example:	If your diagnosis is that the individual is not <i>understanding</i> the focal practice adequately, or thinking about it appropriately, choose a <i>strategic</i> intervention – for example:	If your diagnosis is that the individual lacks <i>execution skill</i>, choose an <i>educational</i> 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?

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!

WORKSHEET:

REFLECT ON COACHING

How does this way of COACHING compare with other types of COACHING you have experienced?

What is most challenging and most new or interesting about this way of supporting others' development?

How could this type of coaching be used to help you support other organizers (volunteer and staff) out in the field? What are some of the practices that you will use next time you work with another organizer?

Coaching Cycle Scenarios – For Use with Coaching 101 Package

Below are 4 scenarios, you have been provided enough information for **Step 1: Inquire and/or Observe - What do I see and hear?** of the coaching cycle – and you are free to use a little imagination to round out the scenario. Your task is to determine what kind of coaching they need – **Motivational, Strategic, Skills-based.**

Scenario 1: The context – You are preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.

This is a group of local leaders that have secured member volunteers to run a phone bank asking for campaign contributions for a school board candidate’s campaign. The leaders are scared of hearing no’s from their colleagues on the phones and are a little by the growing “clarifying questions” coming from their volunteers. Ultimately, they feel they should just scrap the whole thing because they are not confident that the volunteers will show up and they are sure they won’t raise much money.

Type of Coaching: _____

Scenario 2: The context – You are facilitating the goal setting of a leadership team struggling with common understanding of what their campaign should be able to achieve.

The team members have a wildly divergent notions of what the outcomes should be and they keep shying away from setting a goal and straying into thinking about “cool” actions they could plan. It appears to you that they may not have run this kind of meeting before and they may not understand how to develop a plan for action.

Type of Coaching: _____

Scenario 3: The context – You are debriefing with a leader who has not kept a commitment.

The leader is relatively new and quite a bit younger than others at the worksite – but has good relationships and is well respected. The commitment was a relatively small one that was dependent on using already established relationships – a.k.a. “ask five friends to...” You get the sense that this leader has not taken this commitment seriously at all.

Type of Coaching: _____

Scenario 4: The context - Helping a leader overcome motivational challenges with managing other members across several worksites who are supposed to be making a face to face contact with each employee in the worksite to update contact information and establish a basic presence in each worksite.

The leader is having difficulty keeping the teams to following the protocol of relationship building – various teams are reverting to – “ place a notice in the mailbox” – send a broadcast email – or are leaving it to one person at the worksite to do alone – or are not doing it at all. The leader has been shy to redirect the teams to the protocol of face to face contact and feels that it is “not their place” to question if other adults have kept up their end of the work.

Type of Coaching: _____

The Consultancy Coaching Protocol

15 mins	What	How
	Opening by Lead Facilitator	<i>Facilitator reviews protocol and adjusts time as desired by presenter or as fits the group. The group may decide to spend more time on the preparation section, or in the discussion. Timing also depends on how many are in the group.</i>
5	Presenter Shares	1. <i>Presenter shares the dilemma—this can be verbally shared or presenter can offer a written document. If a written description is shared, presenter can also verbally add anything he'd like before or after the group reads the document. It's appropriate for the group members to take notes about what they're hearing. Presenter might also share an artifact such as a transcript of a coaching conversation, an email, a plan for a conversation, etc.</i> 2. <i>Presenter can ask for feedback or input in one area or around one key question. Asking for specific feedback or support can help a discussion stay focused and useful.</i>
3	Clarifying Questions NOT Probing	<i>Group asks presenter clarifying questions. Clarifying questions are yes/no or require very short answers.</i> <i>The facilitator needs to interrupt if probing questions are asked and can remind the group that probing questions can be raised during the discussion.</i>
5	Group Fishbowl Discussion	1. <i>Presenter moves his/her chair outside of the circle and can take notes if desired.</i> 2. <i>The presenter can remind the group of the presenter's key question.</i> 3. <i>Group members can raise probing questions, share the insights they gained, and share any other comments or reflections they came up with. The facilitator can open this section by suggesting that each group member briefly (in about one minute) share his/her initial thoughts on the dilemma and the group can whip around so that all can share a thought before opening into a less structured discussion.</i> 4. <i>Group needs to ensure that discussion stays focused on the presenter's dilemma and if requested, on his/her key question. Group may also take actions to ensure equity of participation.</i>
2	Closing	<i>Presenter shares any reactions, insights, feelings about protocol or what was said; he/she doesn't need to respond to questions that were raised in the group discussion. If time permits, group can share reflections on process.</i>

General Coaching Sentence Stems

Active Listening Stems	Nonjudgmental Responses
• So... • In other words... • What I'm hearing, then... Is that correct? • What I hear you saying is... Am I missing anything? • I'm hearing many things... • As I listen to you, I'm hearing... Is there anything else you feel I should know?	• I noticed how when you...the students really... (to identify something that worked and why it worked) • I'm interested in learning (or hearing) more about... • I'd love to hear more about... • Thank you for sharing your thoughts. Can you tell me more about...?
Clarifying Stems	Probing Stems
• Let me see if I understand... • I'd be interested in hearing more about... • It would help me understand if you'd give me an example of... • So, are you saying/suggesting...? • Tell me what you mean when you... • Tell me how that idea is like (or different from)... • To what extent is...? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...	• What's another way you might...? • What would it look like if...? • What do you think would happen if...? • How was...different from (or similar to)...? • What's another way you might...? • What sort of an impact do you think...? • What criteria do you use to...? • When have you done something like...before? • What do you think...? • How did you decide...(come to that conclusion?)? • I'm curious to know more about... • I'm intrigued by... • I'm interested in... • I wonder...



Facilitative & Directive Coaching Stems*

FACILITATIVE	DIRECTIVE
Cathartic Stems - I'm noticing that you're experiencing some feelings. Would it be OK to explore those for a few minutes? - What's coming up for you right now? Would you like to talk about your feelings? - Wow. I imagine I'd have some emotions if that happened to me. Are you experiencing strong feelings?	Informative Stems - There's a useful book on that topic by... - An effective strategy to teach ____ is... - You can contact ____ in ____ department for that resource... - Your principal will be in touch about that. ____ is very effective at teaching that skill; maybe you could observe him.
Catalytic Stems - Tell me about a previous time when you... How did you deal with that? - I hear you're really struggling with... How do you intend to start? - It sounds like you're unsatisfied with... What would you do differently next time? - You've just talked about five different things you want to work on this week. The last thing you mentioned is... How important is this to you? - How do you want your students (or a particular student) to remember you? - How do you want to remember this time or situation in fifteen years? - Who do you want to be in this situation?	Prescriptive Stems - I would like you to discuss this issue with your supervisor. - You need to know that the school's policy is... - Have you talked to ____ about that yet? Last week you said you planned on doing so. - Would it be ok if I share some advice that I think might help you? You're welcome to take it or leave it, of course. - I'd like to suggest...
Supportive Stems - I noticed how when you...the students really... (To identify something that worked and why it worked) - It sounds like you have a number of ideas to try out! It'll be exciting to see which works best for you! - What did you do to make the lesson so successful? - I'm interested in learning (or hearing) more about... - Your commitment is really inspiring to me. - It sounds like you handled that in a very confident way. - You did a great job when you... - I'm confident that you'll be successful.	Confrontational (Interrupting) Stems - Would you be willing to explore your reasoning (or assumptions) about this? - I'd like to ask you about... Is that okay? - What's another way you might...? - What would it look like if...? Is there any other way to see this situation? - What do you think would happen if...? - What sort of an effect do you think...would have? - I'm noticing (some aspect of your behavior)...What do you think is going on? - What criteria do you use to...? - Who do you want to be in this situation? How do you want to show up? - How do you want others to see you in this situation?

* The labels for these categories—cathartic, catalytic, supportive, informative, directive, confrontational—are from the work of John Heron.



Trusted and Respected

Seattle's site-based organizing

BY JOHN DONAGHY



KATHERINE STREETER

“**S**hannon—but she doesn’t like the union,” said a 3rd-grade teacher, then a 4th-grade teacher, and then eight more teachers over the course of the day we spent at an elementary school in North Seattle in spring 2014. My partner, a board member of the Seattle Education Association (SEA), and I were on a union listening tour. The question we’d posed to each teacher, after first asking how their year was going and about our upcoming bargaining, was “Who’s trusted and respected here in the building?”

SEA was then two years into an effort to reorganize. We’d visited at least 80 of the District’s 100 schools and spoken with more than half of SEA’s 6,000 teachers and certificated staff, para-educators, and office administrators.

The reorganization would culminate in a seven-day strike in September 2015, led by a 40-member bargaining team of largely first-time bargainers and activists. The action won guaranteed recess time for students, removed any connection between test scores and teacher evaluations, won significant raises, and launched Racial Equity Teams in dozens of schools.

The cornerstone of the reorganization was an effort to identify natural school leaders—educators trusted and respected by their co-workers, regardless of their disposition toward the union—and invite them to engage with and shape the union’s direction.

New Leaders Elected

Recognizing their union was not nearly as powerful as it could be, a new slate of SEA officers and the union’s executive director, Glenn Bafia, looked for a new approach in spring 2012. Membership participation and educator morale were low following the bruising regime of an education reformer as superintendent. The union had eaten a high-profile, though somewhat symbolic concession on teacher evaluations and student testing without much of a fight. The regular monthly meetings of building representatives were contentious and caustic, often focusing on “taking positions” on issues but with little action to back them up. Member engagement lagged well behind other locals in the state. SEA staff were buried in disciplinary hearings, grievance meetings, and evaluation conferences, without a strategy or much time to organize.

SEA’s new president, Jonathan Knapp, was a high school auto-shop teacher who’d just finished a term as vice president. Phyllis Campano, an elementary special education teacher, was the new vice president. They were both on full-time release from their teaching jobs. When I first met them, after I was assigned by the Washington Education Association (WEA) to support local organizing, the two indicated they wanted to meet one-on-one with every SEA member. Across WEA and other NEA state affiliates, local leaders were being asked to sit down with each member for a half hour or so to get to know them. I looked at my watch, pressed a button, and said, “Go!” With only four-year terms, they would need to start right away.

In Aesop’s fable, the strength of a single stick is contrasted with that of a bundle of sticks. A single stick can easily be broken, but wrap together enough of even the flimsiest sticks, and they can’t be broken. This is of course the very premise of unionism. But while Aesop’s fable holds much truth, we know as organizers that rather than members being simply scattered individuals, they have instead already grouped themselves informally around natural leaders. The work of the union, then, is to unite as many of the natural leaders as possible, who then bring along those in their circles of influence.

In unions that regularly and successfully organize unorganized workers, the identification and recruitment of natural leaders is the basis for developing effective campaigns. When the employer fights back hard against the union, either the natural leaders can assure their co-workers that the struggle is worth it, or the campaign is defeated.

The opposite approach, which is more common, puts a premium on activism and affinity for the union over actual leadership. The ticket to getting union roles is simply willingness to do something—lobby, make phone calls, come to a school board meeting—rather than any ability to bring others along. Some who get involved are in fact leaders, but many are not. When activists complain about co-worker apathy, a common refrain, it can be an indicator they simply do not have leadership. I was on a building visit in another local, and my partner there began recruiting someone we'd just met to be a building rep after she told us how big a union supporter she was—even though she also told us that she was new in the building and isolated from everyone else! We had no reason to think this person would influence any of her co-workers; if she did become rep, it was likely to be a frustrating experience for everyone.

SEA's leaders instead decided to apply a natural leaders approach. Early in the reorganization we were running phone banks for an upcoming school levy vote. Our usual turnout methods—email blasts, announcements at union meetings, etc.—were getting the usual poor turnout. One afternoon we received a call from an elementary teacher, Michael Tamayo, asking for the phone-banking details. A half-dozen or so of Michael's co-workers had named him among the most trusted and respected educators in his school. A few hours later, he showed up with eight co-workers in tow. Although the union was a bit of a vague idea to him, he cared a lot about the school levy, since it provided more resources to his low-income school and to a program that provided a path for people of color to become teachers. Jonathan and Phyllis continued to seek him out, and he became progressively more involved in SEA, especially around teacher quality and racial equity, and eventually he became SEA's president in late 2019.

With the understanding that natural leaders exist in every school, our plan was to identify and engage such leaders across Seattle's 100 schools. That seemed more doable than sitting down individually with 6,000 members! Our theory of change went something like this: "We can reboot the Seattle Education Association by relentlessly identifying natural school leaders, building relationships with them, and inviting them to lend their leadership to a new shared purpose."

The First Listening Tour

Eager to help the state's largest local reinvent itself, WEA's state president and executive director joined the SEA team of staff and local officers in June 2012 for the first listening tours. We broke into teams of two to go from room to room and office to office in our target schools to seek out staff for brief one-on-one conversations. We didn't announce our visits ahead of time, lest various gatekeepers—principals, office managers, human resources—try to herd us into break rooms or otherwise restrict access.

The teams spoke individually with more than 700 educators in 20 schools over four days. While some union staff feared members would close their doors to us or even be hostile, the opposite occurred. Members were eager to talk with us. If they couldn't speak when we visited, they'd insist we come find them later in the

day. While some shared criticisms, most were curious about our visits and hopeful that the union could make a difference.

The individual visits were intended to last about 10 minutes. These were not classic one-on-ones, but a survey with an eye toward mapping important relationships in the building. We mostly asked how their year was, what the school was like, and what they thought their union should be focusing on. And then we asked, who would you say is trusted and respected here in the building?

Trust and respect are the main currency in cultivating a following. You can trust someone without respecting them, or vice versa. You might have a colleague you trust enough to share complaints about the principal, but whose teaching doesn't meet your standards. Likewise, you might admire someone's excellent lessons, but you wouldn't share a complaint with them for fear it would get back to the principal. Without a measure of both trust and respect, it's unlikely someone will have much influence with you.

When the Seattle teams returned to the union office, they wrote visit reports, and then, on large posters of each school's roster, placed a colored adhesive dot next to a person's name for each time they were named by someone as trusted and respected. Dozens of educators had five or 10 dots next to their names, and in larger schools some had more than 20! While some of those members (and with union shop in place, nearly all were members) were known to union staff and leaders, others were not. Many were wholly uninvolved in SEA.

As the team looked at the posters, it was inspiring to think of the power educators could wield if these natural leaders were united. In subsequent presentations we've done with other locals, showing leaders and staff one of these charts is enough to set them salivating.

Based on my experience in Seattle and then in other locals around the country, not all team members are immediately successful at asking the "trusted and respected" question. Sometimes they aren't fully committed to the reason for asking (which can result from a less than timely orientation). They may think that the real value of the tour is in showing members their union is active and cares about them. That's a common viewpoint, but unfortunately one that reinforces the idea that the union is a third party. Others may struggle because the question can feel like a non sequitur. It takes a bit of skill to have a 10-minute conversation with someone where you establish enough trust and credibility that you can get up from the table and say, "Great talking with you today. Before we go, who would you say are some of the folks who are really trusted and respected among the staff here at Longwood Elementary?"

In the experience of most tour leaders, members are actually happy to answer that question and recognize some esteemed co-workers. It does tend to be better not to ask them directly who they *themselves* trust and respect; that can feel too personal. But asking them who is generally trusted and respected seems to create the needed personal distance (and in fact often results in the member sharing who they personally trust and respect, saying for example, "She's such a great teacher.") The No. 1 mistake we make is not to give enough time to answer the question. In-

stead of letting the question hang out there while the person mentally goes down the building's roster (or looks at the roster we have), we rephrase the question, most typically into something like "you know, who do people go to?" That's actually a different question, one that tends to result in a skew toward naming people with more access to knowledge or resources, such as department chairs, team leaders, office secretaries, union building reps, or even the principal.

Combating Racism and Implicit Bias

Evidence-based leadership identification and recruiting is an important check on implicit bias. Without it, we are likely to pick people who tend to be like us. At future decision points, SEA leaders would check the name of every potential recruit to a committee, lobbying team, or other union body against what their co-workers indicated. We weren't shy about calling each other out for seeking to elevate someone we personally liked in the absence of evidence of leadership. If none of your co-workers placed you among their most trusted and respected colleagues, it wouldn't make sense for the union to ignore their views and elevate you into a representative role. This created some delicate situations when eager volunteers or longtime activists were turned away. While this could be awkward, officers believed the benefit to the union made it worthwhile.

Officers and staff were keen to discern the leadership of educators of color. On one hand, we had a fairly objective measure, but on the other, it was an overwhelmingly white certificated workforce (paraprofessionals and office staff were much more racially mixed) naming whom they trusted and respected. Although there were in fact many educators of color who were named by their white co-workers as trusted and respected, we chose to bake an assumption of bias into our future recruitment efforts. If you ask a white educator to name colleagues they trust and respect, we assumed that they would be at least somewhat more likely to think of other white people first. So when we were recruiting elementary teachers to a committee, for example, we might build a starting list from all the educators of color who received at least three dots and all white educators who received at least five dots.

While this method supported robust recruitment of educators of color into union roles—membership of color on SEA's 40-member bargaining teams has been at least 40 percent over the last three bargains, far higher than the share of educators of color in the workforce—some wondered whether the chosen educators of color were those who were named more by their white peers than their peers of color and how that might be skewing representation. (No one argued that the leadership of an educator of color who was frequently named by white peers should be discounted, only that we needed to be sure that educators of color were represented by leaders of their choosing as well.) To some degree this concern was met by over-recruiting from schools with higher proportions of educators of color, virtually guaranteeing that the leaders were named by educators of color. SEA has also begun in recent years to enter more data into NEA's new membership database, called NEA 360. This allows the union to note exactly who each member names as those they trust and respect, and thus reports can be generated that

provide some insight into that question. In the meantime, SEA did generate one useful data point on that question: a survey about new graduation requirements asked 1,000 high school staff to name staff they trusted and respected to serve on a bargaining committee with the district. SEA was able to disaggregate responses by race and compare who educators of color and white educators each chose and fine-tune recruitment (although in that survey, at any rate, largely the same educators were chosen by both groups).

Intentional Leadership Recruitment

The issue that led us to Shannon's North Seattle school in 2014 was that we'd gotten almost no signatures from there on a petition to place a class size initiative on the Washington state ballot. The union's building rep told us people were apathetic. We were puzzled, as members at other buildings were collecting signatures like crazy—the first fruits of our efforts to involve more natural leaders over the previous two years. For the first time anyone could remember, SEA was among the state's leaders in participating in a coordinated WEA action.

Members at the school told us that Shannon (not her real name) didn't like the union and had spoken against the initiative at a meeting. It would have been easy to take a pass on initiating contact with Shannon—there were 100 other schools to get signatures from. But not every school has a Shannon, trusted and respected to the virtual exclusion of anyone else. We often find three or four staff taking top billing. If we were going to get any signatures from her school, or probably much support for anything union, we needed to meet Shannon.

Vice President Phyllis Campano stopped by a few days later. As it turned out, Shannon was not anti-union, but rather simply believed the union's priority needed to be compensation, not class size. Phyllis couldn't persuade her our ballot initiative was the right priority, and we never did get many signatures from her school. But a relationship was begun that eventually led to Shannon being a member of the 2015 bargaining team, and then of SEA's executive board. In the years that followed, I can't recall a union event that Shannon attended, and there were many, where she didn't bring along a sizable group of colleagues.

After the initial round of visits in June 2012, SEA visited another 50 schools the following school year. But the follow-up with leaders was slow and not terribly successful. The officers invited identified school leaders to lobby days and other events, but had few takers. SEA's leadership team knew the union wasn't seen as very powerful, and these natural leaders were clearly reluctant to invest time and energy in an uncertain proposition. Also, many of them were already highly engaged both at school and in their personal lives.

One leader at a North Seattle high school was on our radar for several years. Although she always seemed on the edge of getting involved, she never made the leap. She led a vibrant after-school horticulture program, was science department chair, and was in training to be a principal. A few weeks *after* the strike in 2015, however, she walked into the union office and told us she'd stepped down as department chair and wanted to prioritize union activism. It took the success of the

strike for her to believe collective action by educators, and her union, held more potential to make the change she wanted to see. While we were fortunate that not all natural school leaders needed this level of proof, there is a positive feedback loop between organizational success and leadership commitment: More of one spurs more of the other.

The leadership team pivoted in the winter of 2013–14. Instead of recruiting leaders to join the union's work, which hadn't borne fruit, we set up a series of meetings that simply brought these leaders together to meet and talk about what was important to them. We approached about 75 of the newly identified leaders, most of whom had little or no union involvement, and more than 60 participated, an astonishing turnout. After a brief welcome from Jonathan and Phyllis, they rotated World Café-style in groups of four for the next hour or so, responding to some open-ended questions. The leaders were excited to have met and to have had rich conversations, and were intrigued by what this convening said about their union.

The meeting did not include an ask, which is something of a sin in organizer circles, but making an ask is what they expected us to do, and we knew we needed these new leaders to join us in figuring out what was worth asking and doing as a union. We never did get around to reconvening these groups, but they provided an important entrée to establish new relationships and signal to these leaders that there was untapped possibility in their union.

Time to Fight Back

SEA's leaders correctly assessed that there was a significant lack of trust in the union and its leadership. SEA had accepted a concession on testing and evaluation in 2010 and failed to remove it in bargaining in 2013. While the practical impacts of the provision were limited, and the contract settlement was otherwise pretty typical, the contract passed by only a thin margin. Educators at Seattle's Garfield High School had organized a high-profile and successful boycott of the district's use of the standardized MAP tests that spring, but the union had failed to leverage that into a robust or successful contract fight over testing and evaluations. Members were understandably reluctant to express approval for a deal that reflected that failure. While the union had tried to organize some pushback in the summer of 2013, it was too little, too late.

In truth, the natural leaders of the workforce were largely on the sidelines as far as the union was concerned and were not responsive to calls to action, such as there were. Most immersed themselves in the work of their individual schools. Some joined Social Equity Educators (SEE), a member caucus, to push the union and Seattle Public Schools toward a more progressive agenda. When natural leaders did choose to become reps, many quickly quit or confined themselves to their buildings. As many confessed to us, they found the monthly Rep Assembly absurdly contentious, and seemingly irrelevant. Indeed, the first Rep Assembly I witnessed featured a lengthy debate over a letter to an elected official of another state. Meanwhile the union's bargaining team had just begun bargaining and virtually no time was devoted to any meaningful discussion of what was at stake.

Following the 2013 bargain, SEA's leadership team and staff conducted more school visits but also focused on following up with the hundreds of members identified as natural leaders. They found that almost to a person they were angry about education reform, cynical about the district's leadership, and, although wary of SEA, appreciative that union leaders had recognized their leadership and were reaching out to them. Finally feeling some sense that they could turn things around, union leaders were challenged in early 2014 by an announcement from the district that it was going to cut 50 positions due to an unexpected budget shortfall.

With many schools at a loss on how to cope with the coming cuts, they began recommending that schools vote down their budgets.

Union leaders believed the district had enough in reserves to cover the shortfall, but complaining publicly about that in board meetings hadn't stopped such cuts before. So rather than focus on getting a few dozen or even a few hundred people to a school board meeting to protest, leaders devised a strategy to create chaos in the school-by-school budgeting process then underway. It would require schools to vote down their budgets, which by contract would trigger a mediation process facilitated by a central office administrator. Even though the superintendent held final say over each school's budget, such a strategy would have the potential to involve thousands of educators right where they worked.

Successful execution of the strategy would require influential educators in each school to endorse it and validate the union's recommendation to vote no on their school budget, *even if their school was untouched by the cuts*. The SEA Rep Assembly endorsed the strategy somewhat lukewarmly, expressing doubts about the union's analysis and strategy. But SEA's leaders then began reaching out to the school leaders they had been cultivating relationships with to get their thoughts on the strategy. With many schools at a loss on how to cope with the coming cuts, they took a leap of faith and, along with many of the building reps, began recommending that schools vote down their budgets to force central office administrators to come explain themselves.

Within three weeks, nearly 50 schools voted to reject their budgets, with more reporting in each day. After the first school's mediation, and faced with the prospects of dozens more, the district called the union to say they were re-analyzing their budget for ways to avoid the cuts. In a school board meeting shortly thereafter, the district's budget director publicly thanked SEA for pointing out that there was a "fudge factor" that could cover the cuts. District administrators then privately appealed to the union for help in getting new school budgets passed, without the cuts, expressing particular bewilderment about "all these solidarity votes" where even schools without cuts had rejected their schools' budgets.

Following the budget action, SEA began recruiting its team for the upcoming bargaining. While the budget fight had garnered SEA's leadership some credibility,

they still barely won re-election later that spring. The following school year, SEA's leadership team proposed quadrupling the size of its bargaining team. We wanted as many members as possible to know someone on that team who held their trust and respect. The countless hours of relationship-building, the success of the budget fight, and the commitment to open the process to many more people led to a tremendous amount of interest from heretofore inactive leaders in joining the new team.

2015 Bargain and Strike

The 2015 bargaining kicked off a year later as locals up and down the I-5 corridor had been going on one-day strikes against the Washington Legislature. Seattle chose May 19 for its one-day strike, the day *before* bargaining was to start. The march through downtown Seattle was a blocks-long warning shot to the school district; this was not the SEA they had been dealing with in recent years. While everyone from SEA's building reps to district officials expressed doubt that a 40-member team could functionally bargain, as team members walked into bargaining in their red T-shirts, still jubilant from the previous day's action, our power was evident.

Most team members were new to bargaining, and many to being active in the union. Others were seasoned bargainers, and at least five were members of the SEE caucus. SEA's leaders had made a particular effort to recruit natural leaders who were in SEE, including their candidate for vice president in the recent election. SEE members, for their part, made it clear they weren't going to drop their critique of union leadership nor back off from their own progressive advocacy, including guaranteed recess for all students, not a typical union demand (and which was immediately dismissed by the district as outside legal bargaining parameters).

The union officers knew that all on the team, even their critics, were highly credible to their co-workers, and that would lead to a cohesive and effective bargaining team. The team debated and hashed out proposals from recess to teacher quality, from racial equity for students to the pay gap between ESPs and certificated staff, and won on virtually all of them (including recess). When the district brought a late-game takeaway to the table, a raucous meeting of thousands of SEA members gave the team unanimous authority to call a strike. When talks broke down the night before school was to start, our team let the district know that we were now on strike.

Any large strike of any length is a story in itself, and Seattle's seven-day strike is no exception. Almost to a person, the WEA and NEA staff who joined in to support our strike noted how incredibly well organized each school's strike operation was, and how little was needed of them. The natural school leaders were in charge. 📌

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Financialization Created Chicago Public Schools' Fiscal Crisis

BY

STEPHANIE FARMER

Chicago Public Schools has constantly found itself in fiscal crises in recent years, crises that then justify brutal austerity. But those crises didn't come from nowhere: they were the logical outcome of turning to Wall Street for funding on credit instead of taxing the rich.

Chicago Public Schools (CPS) is in a deep and enduring fiscal crisis. After decades of budget cuts, Chicago's public K–12 schools have been hollowed out, magnifying the hardships of stagnant wages, rising housing prices, and more faced by the city's working class. Pundits have predictably blamed CPS's fiscal crisis on either the greedy teachers' union (Republicans' and a few austerity-minded Democrats' scapegoat) or on conservative suburban and rural "downstate" politicians in Illinois hostile to urban children's plight (most Democrats' scapegoat).

But Chicago is a one-party city, controlled by the Democrats, in a solidly blue state, where Democrats usually control the state government. In reality, CPS's endless fiscal crises and austerity are consequences of a ruling-class project to chip away at Chicago public education. This has involved a two-pronged strategy of school-choice policies and education financialization carried out by successive Democratic mayors with the backing and active encouragement of key elements of Chicago capital. School-choice policies seek to remake public education in the image of a competitive market, where schools compete for education consumers (children and their parents). Education financialization expanded the role of financial instruments, actors, and markets in public education's operations.

Together, these policies have reconfigured Chicago Public Schools. The district's funding streams now function as a rent extraction machine, channeling revenue out of the CPS classrooms that serve black, brown, and immigrant working-class neighborhoods and into the pockets of Wall Street.

A Marketplace of Schools

Public K–12 education has many uses. It provides hard and soft skills in preparation for the labor force; socialization in civic, cultural, and political norms; and acts as de facto childcare centers for younger children, reducing the cost of living for parents. Radicals and reformers have demanded tuition-free public education since the late eighteenth century. Universally accessible, tuition-free, public, K–12 education contributes to the social wage, the mix of publicly provided goods and services that add to the normative standard of living. Universal access to tuition-free public K–12 education was rolled out alongside other New Deal reforms of the 1930s and '40s — taxing the rich, the expansion of unions, and regulation of finance and industry — associated with the Keynesian period in the development of US capitalism.

By the 1970s, the Keynesian phase of US capitalism was in crisis as competitor economies in Europe and the Pacific Rim rebuilt following World War II, and high wages and high fixed costs cut into the corporate profit rate. In the 1980s and 1990s, an ideologically committed and organized capitalist class rolled back Keynesian capitalism and rolled out a more cutthroat neoliberal capitalism.

By the 1990s, an anti-tax, anti-union, anti-regulation, and anti-public-sector ideological conventional wisdom had taken root among Republicans and Democrats alike. Taxation was characterized as rent-seeking by the “parasitic state” with its inherently “inefficient” public sector. In contrast, free enterprise capitalism with open markets and light regulation was held up as the ideal institutional arrangement for organizing the production and distribution of nearly all goods and services.

In this context, the meaning of public education shifted. Public education became less about cultural enrichment and civic engagement. Under neoliberalism, the emphasis in public education was placed, first and foremost, on providing individuals with the skills and habits appropriate for the marketplace. Anyone could overcome the hardship of their circumstances so long as they were willing to work hard, first in school and later in the labor force.

Public schools were expected to operate akin to businesses and adapt to the new era of iterative austerity, doing more with less. Public education was expected to reflect and advance the same norms and practices as the prevailing neoliberal capitalism it was embedded in.

In Chicago, Mayor Richard M. Daley and his business-elite organization backers (like the Civic Committee of the Commercial Club) were ahead of the national trend in implementing neoliberal reforms of the school system. In order to make schools function more like businesses, CPS adopted school-choice reform policies (like the 1996 Illinois Charter School Law and the Renaissance 2010 plan of 2004) that would create a simulated “marketplace” of schools. Parents were encouraged to approach education like consumers and choose the best school product for their children, comparing metrics of success like shopping for toothpaste in the grocery store.



Chicago mayor Richard M. Daley in May 2010 (Chris Eaves / Wikimedia Commons)

To create this school marketplace, CPS closed putatively low-performing public schools and rolled out a portfolio of high-performing public schools (like gifted elementary, magnet, and selective enrollment high schools) with competitive admission criteria, primarily in high-value real estate markets.

CPS also privatized the school system through charter schools, schools that are privately operated but still publicly funded. These less transparent, less democratically accountable, and initially nonunionized charter schools were overwhelmingly placed in black and Latino working-class communities.

According to the Chicago Public Schools Comprehensive Annual Financial Report from 1995 to 2018 (our data source throughout), between those years, CPS opened 230 new schools, while closing 123 schools, for a net gain of 107 schools. Over half of CPS's 230 new schools were charter schools. Charter school expansion privileged the interests of charter operators, seeking a foothold for their business enterprises in the city, over what was best for the public school system as

a whole. As the CPS system was growing dramatically with a wave of charter expansion, Chicago's population of school-aged children actually declined from over 435,000 students in 2005 to 371,000 students (64,000 fewer kids) in the CPS system in 2018.

Despite this pattern of population decline, nearly 85 percent of the new charter schools were opened after 2005. By 2018, charter school proliferation consumed 11 percent of CPS's budget, up from just 3 percent in 2006.

The Financialization of Chicago Public Schools

Due to the prevailing neoliberal anti-tax conventional wisdom, the state and city governments were unwilling to raise taxes to fund CPS. So, in order to carry out these school choice reforms, CPS turned to credit markets, paving the way for education financialization. Local education administrators, financiers, and politicians partnered up to devise frameworks and investment instruments that insinuated finance capital into the funding and operation of public education as the needs and well-being of children were monetized for rent-seeking investors.

Finance capital was attracted to public education because it provided new sites for capturing profits. By the 1990s, due to overaccumulation in other markets and government deregulation of finance, capital flooded into US finance and real estate markets. Moreover, dollar-denominated US municipal bonds were comparatively safer and provided steadier returns (albeit at a lower rate of return) than other, more traditional private-sector investment instruments.

With this new, expanded access to credit markets, CPS leveraged \$8.5 billion in debt to finance its oversupply of choice schools. By 2018, CPS was dedicating \$651 million of its budget (or 10 percent of its operations budget) to make payments on its debt, up from \$133 million, or 3.5 percent of its operations budget in 1998 (adjusted for 2018 inflation).

Predictably, charter schools carved out their own niche in the financialization game. Since their finances are considered proprietary, researchers could only find data for 27 percent of all CPS charter schools in 2015 through audits filed with the Illinois State Board of Education. The combined outstanding debt from bond issuances for these Chicago charter schools totaled \$225 million. Ultimately, charter school debt becomes taxpayer debt, since charter schools receive a per-pupil stipend from CPS to cover their facility and operations expenses.



The Chicago Public Schools logo. (WBEZ)

As the debt obligations of CPS grew, the district pursued financial fixes to address debt-driven budget shortfalls. CPS leadership contracted with banks to develop new, higher-risk speculative instruments around CPS debt, including variable rate bonds, auction rate bonds, credit swaps, and options. CPS officials were hoping to deliver a financial windfall for the public sector via these high-risk, high-reward instruments.

CPS made an unprecedented \$1.5 billion bet on bonds with high-risk floating interest rates. Traditional municipal bonds have a fixed interest rate for the term of the bond. In contrast, bonds with floating interest rates have rates of interest that rise or fall in relation to some agreed reference rate (frequently the LIBOR rate at which banks lend to one another). If interest rates fell below the traditional fixed interest rate bonds, CPS would capture significant savings. Yet if interest rates rose above that fixed interest rate, CPS would be obligated to pay more for their bonds than traditional bonds.

Then, in a gambit to protect CPS from the impact of interest rates falling, the district “hedged” their risk by buying \$1 billion worth of interest-rate swap derivatives from Bank of America, Goldman Sachs, Merrill Lynch, and Lehman Brothers.

When the 2007 financial crisis hit, the Federal Reserve reduced interest rates to 0.5 percent. CPS’s interest-rate swap agreements mandated the school district pay a higher fixed interest rate on their variable rate bonds to the investment banks holding the swaps, which only had to pay a little over 0.5 percent interest rate on the variable bond. The investment banks pocketed the difference between what CPS paid them and what they owed on the bond. The *Chicago Tribune* has shown that the variable rate bonds may have cost Chicago taxpayers \$100 million more than if the schools had borrowed the debt with more traditional fixed interest rate bonds.

Meanwhile, the same banks that were reaping windfall profits from CPS’s interest-rate swap disaster were also receiving federal bailout dollars. There was no bailout for CPS. The district had to pay a total of \$254 million in penalties to terminate all their associated swap contracts in order to refinance their underlying debt at the lower interest rates now

on offer. Since CPS revenues nose-dived during the crisis, they had to turn once again to the credit markets, to borrow money (at interest) from banks awash in government bailout dollars to pay those penalties.

CPS also sold option derivatives to the Royal Bank of Canada and Bank of America on its bonds, where the contract compelled CPS to issue debt if certain conditions occurred, like credit rating devaluations. In the wake of the financial crisis, CPS's bond rating fell below the rating needed to be in good standing for those options. In turn, the banks exercised their rights to make CPS issue another \$263 million in new debt in order to protect their investments.

Altogether, CPS's fling with exotic debt instruments cost the school system at least \$617 million. Since these payments were themselves largely debt financed, the people of Chicago, via the taxes paid to CPS, will end up paying Wall Street nearly \$1 billion on these losses.

Public Education Dispossession

Chicago Public Schools' school choice reform and financializing strategies have entrenched the public schools in a cycle of austerity. Tax cuts for the rich and retrenchment of federal and state government forced local governments into footing the bill for public goods and services under conditions of fiscal austerity. CPS overbuilt public schools through a high debt leverage funding strategy. This debt-driven oversupply of schools in an era of austerity pushed CPS to use risky financial instruments that then increased the debt burden of CPS.

The rising costs associated with building and operating redundant schools, growing debt service obligations, and the fling with high-risk exotic financial instruments produced recurrent fiscal crises. The response from the mayor and CPS leaders has been to embrace more austerity for the public schools, dispossessing Chicago residents of essential public education services.

“Chicago Public Schools’ school choice reform and financializing strategies have entrenched the public schools in a cycle of austerity.”

By the mid-2010s, the school system was anticipating annual half-billion-dollar deficits. With raising taxes off the table, CPS again cut its expenditures to close budget gaps. Since 10 percent of the district's general operations budget is locked into servicing debt, this portion of the budget is off-limits to cuts, requiring CPS to make even deeper cuts to the parts of the budget associated with frontline teaching and learning.

The district cut teaching and other student-facing education professional positions. Between 2010 and 2018, CPS reduced spending on teachers' salaries by \$421 million. In that same period, CPS's debt service payments increased by \$264 million, from \$387 million in 2010 to \$651 million in 2018. Ballooning debt service payments consumed the "savings" from downsizing the teaching labor force, effectively transferring revenue from Chicago's teachers to the investor class.

CPS starved school budgets, forcing individual schools to make repeated \$1 million cuts from their budgets. Things got so bad that schools held toilet paper drives to supply their schools. Other schools have packed forty kindergarteners into single classrooms and slashed arts, language, and other enriching but noncore curriculum. The most vulnerable students with learning disabilities were not spared, as \$40 million in supports was pulled out from under them.

Dispossession was largely racialized. In 2013, under the directive of Mayor Rahm Emanuel, CPS closed forty-nine schools with low enrollments, nearly 90 percent of which were in mostly black communities.



Protesters march in the Loop on March 27, 2013 during a rally to protest the proposed closing of 54 Chicago public schools. (WBEZ / Robin Amer via Flickr)

In contrast, the affluent (and mostly white) families who sent their kids to CPS were largely insulated from dispossession, thanks to activist parents' fundraising activities. According to CPS's Internal Accounts data, CPS schools raised a combined \$33 million from parent groups and "friends of" committees that hosted whimsical holiday craft markets, teacher bartender nights, and school spirit stores in 2018.

You can't blame wealthier parents for plugging the holes in their kids' budgets. But schools in poorer communities could not equally tap into parents' or charitable community members' pockets.

When cuts and closures proved insufficient to fill in the holes in the budget, CPS doubled down on its financialization strategy and issued another \$725 million bond to pay off one year's worth of debt service and short-term operation expenses in 2016. The district was forced to borrow at an onerous 8.5 percent interest rate, since its debt burden drove down its credit rating. The dependence on debt to pay for operating expenses sealed the conversion of CPS into a rent extraction machine for finance capital.

A New Era of Education Inequality

The two-prong strategy of market-based school choice reforms and education financialization pursued by CPS has created a new era of education inequality. Compelling public education to mimic a marketplace of competition has privileged the interests of elites and the affluent over and against the interests of the working-class majority, hollowing out mostly black and Latino communities' schools so that the district could roll out exclusive enrollment schools (disproportionately serving white professional-class families) and a wave of privately operated charter schools.

Education financialization is transforming the distributive role of public schools, from taxing the rich to fund public education, to borrowing money from the rich to pay for schools. CPS's strategy of education financialization turns schools into income streams for rent-seeking finance capital, which siphons public dollars out of classrooms and communities. Those dollars are then channeled into investors' portfolios. As the burden of debt grows, debt overhang is used by austerians as an alibi to further shrink the public sector by inflicting cuts on frontline teaching and learning.

Political leaders can continue to debt finance and grind public education into dust. Or they can change course and tax the rich to raise the revenue necessary to fund public K–12 education. Clearly, taxing the asset-owning rich is the better option than borrowing money from them (through the bond market) and paying them back with interest.

Taxing the rich to spend on universal, tuition-free, public K–12 education funds quality education for all children; reduces economic inequality, channeling revenue away from the rich and raising the social wage for the working class; and demonstrates the efficacy of providing goods and services via the more transparent, more accountable, and democratically planned public sector. If we don't tax the rich to pay for public goods and services, we'll be stuck in endless waves of austerity — and working-class students, parents, and educators will pay the price.

The author thanks Rachel Weber for her contributions to this piece.

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CHARTER SCHOOLS / CHICAGO PUBLIC SCHOOLS

Join the movement for a living wage, fairness, and rESPect for school support staff!

#ESPBillofRights



Education Support Professionals (ESPs) are critical to the success of our nation's public schools. Education leaders and policymakers must commit to investing in ESPs, respecting their professional expertise, and recognizing their vital contributions to student learning and well-being.

✓ Fair Compensation

One job should be enough! ESPs should not have to work multiple jobs to maintain financial independence. Those who do not have a full 12-month contract should be eligible for unemployment benefits during the summer or time they are laid off.

✓ Recognition and Respect

ESPs play a vital role on the education team and in students' lives inside and outside the classroom. They keep our schools running and our students safe, healthy, and ready to learn every day. They deserve to be respected and recognized as accomplished professionals.

✓ Safe and Healthy Work Environment

ESPs deserve a safe and healthy workplace that is free of violence, including physical, verbal, and emotional abuse, and free of exposure to hazardous materials. ESPs deserve clear safety protocols, appropriate supplies, safely maintained equipment, training on workplace regulations, and whistleblower protections.

✓ Affordable Healthcare

ESPs should have access to affordable health insurance.

✓ Paid Leave

ESPs deserve paid leave, including personal days, sick days, parental/caregiver leave, and Family and Medical Leave Act (FMLA) benefits.

✓ Professional Learning and Career Advancement

ESPs deserve high-quality, job-related professional learning and accessible opportunities for career advancement. Seniority rights must be protected when ESPs pursue promotions and request transfers, and at times of layoffs or furlough.

✓ Workload and Staffing

ESPs have the right to a workload that allows them to excel in their assigned positions. ESPs deserve a voice in establishing fully staffed shifts, clear work protocols, and resources that support their careers.

✓ Retirement

ESPs have the right to a secure retirement. All their years of service should count toward a pension.

✓ Protection from Privatization

ESPs should be free of the threats of privatization that risk the stability of school communities, silence the voice of employees, and further undermine the value of the services they provide in their jobs.

✓ Right to Bargain

ESPs deserve a strong voice in their workplace that includes the right to join their union and advocate for the rights and protections they deserve. Bargaining and advocacy ensure they enhance student learning and improve educator working conditions—benefiting students, schools, and the community as a whole.



Learn more and sign on as a supporter at
nea.org/ESPBillofRights
 or scan the QR code!



**ESP Bill
of
Rights**
 One job should be enough.

¡Únete al movimiento por un salario digno, la equidad y el r**ESP**eto al personal de apoyo escolar!

#ESPBillofRights

#ESPDeclaraciondeDerechos • #DeclaracionDeDerechosESP



Los Profesionales de Apoyo Educativo (ESP) son fundamentales para el éxito de las escuelas públicas de nuestra nación. Los líderes educativos y los responsables de la formulación de políticas deben comprometerse a invertir en los ESP, respetando su profesionalismo, y reconociendo sus contribuciones vitales al aprendizaje y bienestar de los estudiantes.

✓ **Compensación Justa**

¡Un solo trabajo debe ser suficiente! Los ESP no deberían tener que trabajar en varios trabajos para mantener la independencia financiera. Aquellos que no tienen un contrato completo de 12 meses deberían ser elegibles para beneficios de desempleo durante el verano o el tiempo en que son despedidos o dados de baja.

✓ **Reconocimiento y Respeto**

Los ESP juegan un papel vital en el equipo educativo y en la vida de los estudiantes dentro y fuera del aula. Mantienen nuestras escuelas en funcionamiento y a nuestros estudiantes seguros, saludables y listos para aprender todos los días. Merecen ser respetados y reconocidos como profesionales consumados.

✓ **Ambiente de Trabajo Seguro y Saludable**

Los ESP merecen un lugar de trabajo seguro y saludable que esté libre de violencia, incluido el abuso físico, verbal y emocional, y libre de exposición a materiales peligrosos. Los ESP merecen protocolos de seguridad claros, suministros adecuados, equipos mantenidos de forma segura, entrenamientos sobre las regulaciones del lugar de trabajo y protección de los denunciantes/informantes.

✓ **Seguro Médico Asequible**

Los ESP deben tener acceso a un seguro de salud asequible.

✓ **Tiempo Libre Pagado**

Los ESP merecen tiempo libre pagado, incluidos los días personales, los días de enfermedad, permiso parental/cuidador/a y los beneficios de la Ley de Permiso Familiar y Médica (FMLA).

✓ **Aprendizaje Profesional y Avance Profesional**

Los ESP merecen un aprendizaje profesional de alta calidad relacionado con el trabajo y oportunidades accesibles para el avance profesional. Los derechos de señoría (años de servicio) deben protegerse cuando los ESP buscan ascensos y solicitan traslados, y en momentos de despidos o dados de baja.

✓ **Carga de Trabajo y Dotación de Personal**

Los ESP tienen derecho a una carga de trabajo que les permita sobresalir en sus puestos asignados. Los ESP merecen tener voz en el establecimiento de turnos con todo el personal, protocolos de trabajo claros y recursos que apoyen sus carreras.

✓ **Jubilación**

Los ESP tienen derecho a una jubilación segura. Todos sus años de servicio deben contar para una pensión.

✓ **Protección contra la Privatización**

Los ESP deben estar libres de las amenazas de privatización que ponen en riesgo la estabilidad de las comunidades escolares, silencian la voz de los empleados y socavan aún más el valor de los servicios que prestan en sus puestos de trabajo.

✓ **Derecho a Negociar**

Los ESP merecen una voz fuerte en su lugar de trabajo que incluya el derecho a unirse a su sindicato/unión y abogar por los derechos y protecciones que merecen. La negociación y la promoción garantizan que mejoren el aprendizaje de los estudiantes y mejoren las condiciones de trabajo de los educadores, lo que beneficia a los estudiantes, las escuelas y la comunidad en su conjunto.



¡Obtenga más información y regístrese para apoyar en
nea.org/ESPBillofRights
 O escanee el código QR!



**ESP Bill
 of
 Rights**

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 meetings ➤ 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 NEA Education Support Professionals Bill of Rights

What is the NEA Education Support Professionals (ESP) BOR?

In response to advocacy from ESPs on NEA's board of directors and at the direction of NEA President, Becky Pringle, the NEA ESP Bill of Rights was created after the success of ESP-specific strategic campaigns in Massachusetts, Maryland, and Illinois. The priority topics of the NEA Bill of Rights were identified with input from ESPs nationwide and the NEA Board of Directors ESP Careers Committee.

There are 10 priority topics named in the NEA ESP Bill of Rights:

- Fair Compensation
- Recognition and Respect
- Safe and Healthy Work Environment
- Affordable Healthcare
- Paid Leave
- Professional Learning and Career Advancement
- Workload and Staffing
- Retirement
- Protection from Privatization
- Right to Bargain

What is the purpose of NEA's ESP Bill of Rights?

The NEA Education Support Professionals Bill of Rights is an articulation of the most important needs of ESPs as identified by a national sampling of ESPs. Having these needs packaged and branded under the NEA ESP Bill of Rights helps NEA and its affiliates pursue policies, programs, and partnerships that help meet these needs. NEA's ESP Bill of Rights is the charge given to this union by its members on where to focus its energy and resources.

The NEA Bill of Rights is supported by a campaign to get individuals and affiliates to sign-on and endorse the NEA ESP Bill of Rights, thereby giving the document greater weight and credibility. Each endorsement is also a commitment to advocate for these ESP needs. An important part of the campaign is encouraging/prompting state and local affiliates to create *their own* ESP Bill of Rights.

Why not just use the NEA ESP Bill of Rights?

The creation of any ESP Bill of Rights should reflect the voice and interests of the ESPs it represents. **A foundational component of an ESP Bill of Rights is a commitment to conversations and other strategies to engage as many ESPs as possible to assure *their* voice is reflected in *their* Bill of Rights.** Simply adapting someone else's Bill of Rights, even if you are certain the topics will be the same, skips that very important step and shortcuts ownership and engagement. Any affiliate interested in creating their own ESP Bill of Rights is welcome to use NEA's ESP Bill of Rights as the starting point for a conversation with ESPs.

The ESP Bill of Rights should be used as an organizing tool to:

- Make a positive impact for ESPs – Win! Win! Win!
- Position the union and the power of the collective as a force for positive change for ESPs and, in doing so, attract new members and engage/activate existing ones
- Foster collaboration and relationship building by engaging ALL members, regardless of membership type, in supporting ESPs
 - It is important to have the support and engagement of certified staff, local and state union leaders, and other unions in the local, region, and state
- Create a bargaining and policy framework to address issues outlined in state and local ESP Bill of Rights
- Engage the community, decision makers and elected officials to increase awareness, advocacy, and solutions for issues impacting ESPs

How is NEA's ESP Bill of Rights different from the *Bill of Rights for Paraprofessionals and Education Support Staff*, the resolution introduced in November 2023 by U.S. Senator Markey?

NEA is grateful to Senator Markey for introducing his resolution. As a resolution, what he has proposed is not law (so no funding or accountability), but rather is an expression/message of collective sentiment/support of a group of people (in this case, Congress). The resolution has not yet been adopted, but work continues to secure the votes needed to pass. Despite it not being law, Senator Markey's Bill of Rights does a great deal to raise awareness and move support for ESPs in Congress and can do even more when/if passed. Awareness is foundationally important to build from when legislation is proposed, for awareness can allow for smarter ESP inclusion and greater ESP benefit.

Senator Markey's resolution is NOT in competition with the NEA ESP Bill of Rights, rather they complement each other by raising awareness and carving multiple paths to support ESPs. Support from members for both is crucial and will benefit ESPs.

How do I start an ESP Bill of Rights campaign in my own state or local affiliate?

As part of NEA's strategic campaign to scale impact for ESPs through its Bill of Rights, NEA has started compiling a variety of resources, including prerecorded webinars from Massachusetts, Maryland, and Illinois, explaining in detail how to begin a campaign. These webinars are an invaluable resource! We are also in the midst of compiling additional resources, including sample bargaining language, legislation, branding, advocacy collateral, etc. We will make these available in the coming months.

Where do I get support?

In your affiliate: Speak with your local, and/or state leadership, your Uniserv Director, or your state staff ESP Coordinator.

At NEA: Contact us at ESPBOR@nea.org

From other members: If you're at the NEA ESP National Conference, consider attending workshops 30 and/or 23. If you are unable to, then reach out to the workshop presenters to learn more about their experience.

Are resources available? Please visit nea.org/espbillsofrights