



Organizing ESP

UniServ Focus Academy



Campaign Academy

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Feedback on Feedback

Your Words

Agenda Review - Today

Leaders, from Clubs to Unions

Building Engaged Leaders

Ladder of Engagement

Team time and presentations

Lunch

Adjourn



Community Agreements p. 2-3

- › Using Self-Awareness and Self-Knowledge
- › Listening for Understanding
- › Being Gracious
- › Staying Engaged
- › Being Open and Suspend Judgment
- › Saying “I”- tell your truth
- › Seeking Discomfort
- › Reaching Empathy
- › Expecting Non-Resolution and Non-Closure

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

Campaign Lab Information and Application



<https://www.nea.org/resource-library/campaign-lab>



Leaders

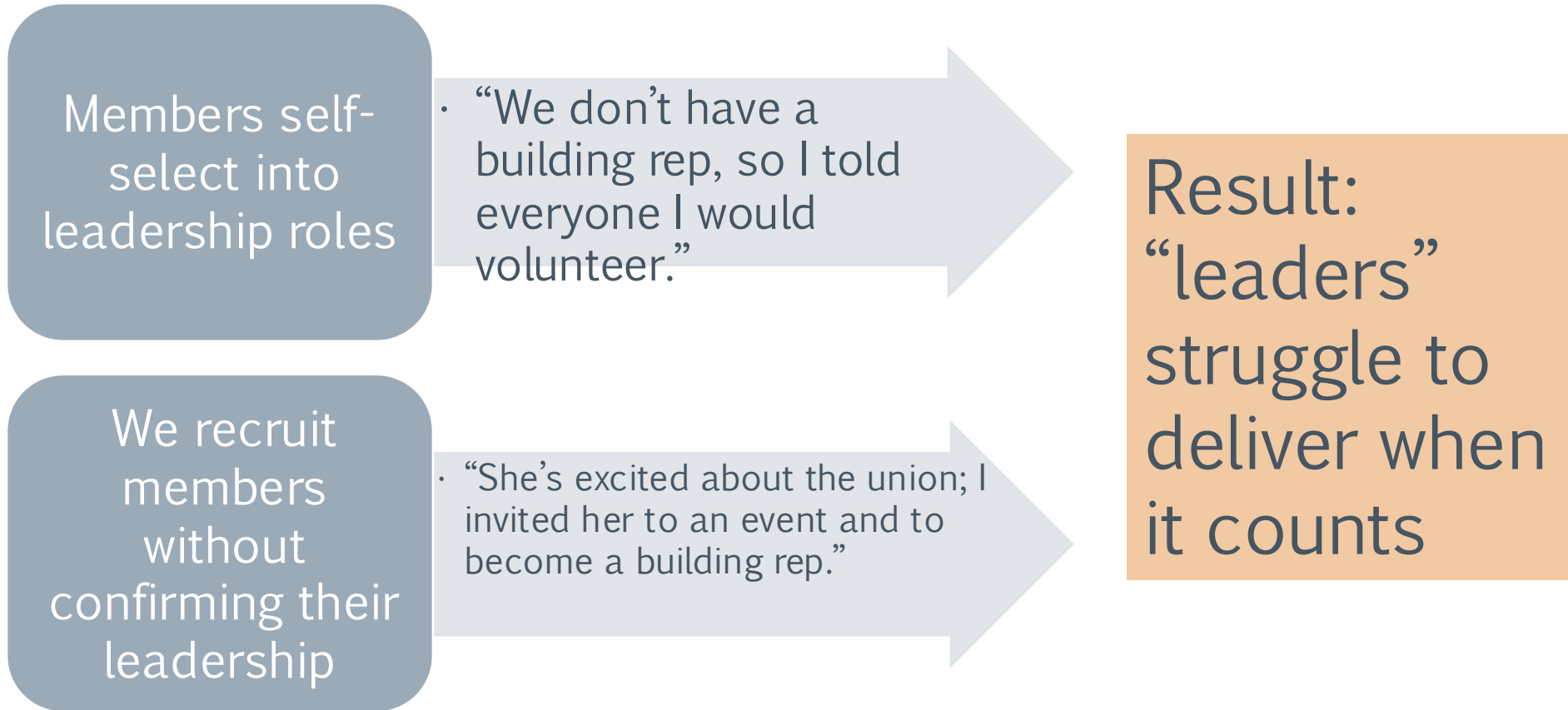
Monet & Ben

Organizing and Leadership

- › Leadership is taking responsibility for enabling others to achieve shared purpose in the face of uncertainty.
- › The members who can lead most successfully are those who already have followers, i.e. people who trust and respect them.



How it typically goes...



PLUS, lots of implicit bias as we choose “leaders” who meet our criteria.

Member to Leader p.102



Identify
Leaders



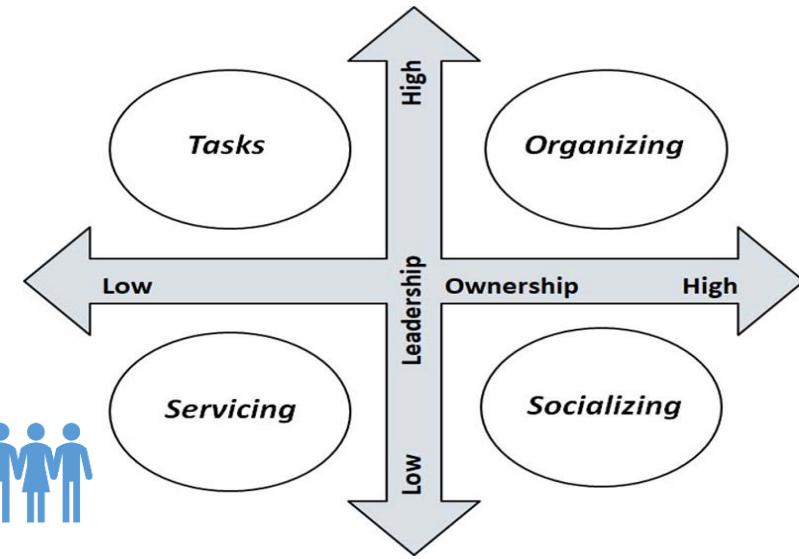
Know what
your
leader's
issues are



Ask them
to join in
shaping
the agenda
with other
leaders



Give leaders
meaningful
tasks/roles
around the
issues they care
about.



The Blitz, an organizing tool

Have 10-minute individual conversations with as many members as possible in a building:

1. What do you think are the biggest issues facing us in public education? In our school district?
2. Who's trusted and respected here in the building?



Looking at the data - what do you notice?

HAWTHORNE ELEMENTARY 15

CLASS	LAST NAME	FIRST NAME	MEMBER/ AGENCY	WEA- PAC	
CERT	Le	Tan	Member	No	
CERT	Mak	Melissa	Member	No	●
CERT	Mei	Chongyuan	Member	No	
CERT	Hamilton	Gina	Member	Yes	● ● ● ● ●
CERT	Smith-Brown	Charlene	Member	No	●
CERT	Simons	Elaine	Member	Yes	
CERT	Flanzer	Elissa	Member	No	●
CERT	Pogreba	Elizabeth	Member	Yes	
CERT	Martin Nowell	Lalania	Member	No	● ● ● ●
CERT	Kribbs	Katherine	Member	No	● ● ● ● ● ● ●
CERT	Leighton	Tina	Member	Yes	● ● ● ● ●
CERT	Toomey	Bruce	Member	Yes	● ●
CERT	Hunter	Oveta	Member	Yes	● ● ● ● ● ●
CERT	Meraki	Mark	Member	No	● ● ● ● ●
CERT	McDonough	Cassie	Member	Yes	● ● ●
CERT	Lock-Levi	Marcella	Member	No	
CERT	Gianacos	Tami	Member	No	
CERT	Hill	Len	Member	No	● ● ● ● ● ● ● ●
CERT	Rutledge	Stephanie	Agency	No	
CERT	Conner	Julene	Member	No	
CERT	Manzo	Jennie	Member	No	
CERT	Appleyard	Tracy	Agency	No	
CERT	Patterson Lystra	Shawna	Agency	No	●
CERT	Schoenfelder	Caitlin	Agency	No	

Person	Member	Yes	
Susan	Member	Yes	
Deborah	Member	No	●
Tina	Member	No	
Stacy	Member	No	●
Jessica	Agency	No	
Siobhan	Member	Yes	● ● ● ● ● ● ●
Erin	Member	No	●
Heather	Member	Yes	
Elisa	Member	Yes	● ●

KEY POINTS



Just because they have been identified by a number of colleagues does not immediately mean members are the “best” leaders for what the local needs.

There needs to be more work to build a relationship with members about what their agenda is and what the agenda of the union is – moving them to work with the union’s agenda.



Club to Union

Monet & Ben

Opportunities for Leadership

Unorganized

- Staff Lead – No Risk by Members
- Focus on Recruitment and Engagement

Club

- Staff Lead – Already Active Members –Low Risk Activities
- Staff Focus on Engagement and Leader ID

Union

- Member and Staff Partners – Mid Risk Activities
- Staff Coach and Build Leader Capacity

Fighting Union

- Members Lead with Courage and Risk
- Staff Advise and Coach

Club or Union?

	Unorganized	Club	Union	Fighting Union
Budgeting	Little or no local funding	Funding used to recognize activists -- stipends, meals	Funding used to recognize activists and also to reach out to members: stickers, buttons, tee shirts, picket signs.	Funding used to release activists to do work, to communicate with members, and to open opportunities to the newly active. Funding supports coalition work and socially focused issues
Roles	A few officers, risk of vacancy	Proliferation of titles and stipends to Presidential allies	Titles and roles generally tied to actual activities; if there's a treasurer, there is a budget; if there's a newsletter chair, there's actually a newsletter	Titles rotate regularly, or are even dropped when no longer needed
Bargaining	No bargaining, or done by a single expert (UD, President)	Small group of the usual folks on the bargaining team that the president trusts	Team represents all major job categories. Criteria is whether or not the president trusts them and they are recognized by members	Team represents all major job categories; criteria is whether they are trusted by the members
Leaders	Volunteers if any	Tends to be the same small group of folks that populate other teams. Little to no risks are taken.	Elections are regularly held and there are sometimes contested positions. Leaders can move others to act. However, their focus is on activism and mobilizing instead of term organizing.	Are trusted and respected by members, and there is a healthy election process with a number of good candidates. Leaders routinely deliver on persuading large groups to take public collective action; the and actively seeks other trusted and respected leaders. Leaders use their agency to take risks that result in growth.
Equity	Very little prioritization of racial equity or inclusionary practices by local leaders.	An awareness of the value of equity-based practices but seeing that as the districts role to execute.	Values diversity and has an 'official' position reserved in the leadership for a diversity representative. Limited interactions with the community around valuing racial equity and inclusion. Still seen as the district's responsibility to implement equity based practices. Leadership may reach out intermittently to underrepresented employee groups.	Infuse bargaining with concerns that address race, class, democracy, historically marginalized communities/members, and equity issues. Local union budget reflects equity as a priority and positions in the union. The commitment to equity is explicit. Management and Labor are partners in engaging families, community and ethnic groups to support the local public schools. Local leadership and positions in the union reflects the diversity of their membership and/or community they work in. Leaders see racial equity as their responsibility to implement and lead on.

Club or Union? ACTIVITY (In additional participant resources)



Think of a local you work with – at what point of the continuum are they on?

What is your role in moving locals from left to right in this framework?

What do you think is most required to move from left to right?

Club or Union Debrief



- What did you learn?
- How useful was this in thinking about your work with ESP units?
- What would you add to it?

KEY IDEAS



Unions with leaders who are unwilling to take any level of risk will not be able to grow into unions that can demand and win what members want and need.

The way to build leaders is to not do for them what they can do for themselves, design “tasks” that cause people to have more leadership and ownership



Building Engaged Leaders

Michael & Eric

The best way to grow leaders is to give them meaningful, challenging (risky) tasks (tests), and see if they can achieve them. Then give them another task to do . . .





1

Experience
meaningfulness: the
task is important in
the overall scheme of
things and is big
enough that it will be
a challenge to
achieve.



2

Experience
responsibility: how
well the task gets
done is up to me.



3

Experience results:
as I attempt to do
the work, I can see
whether or not I
am doing well.

How you make the ask matters



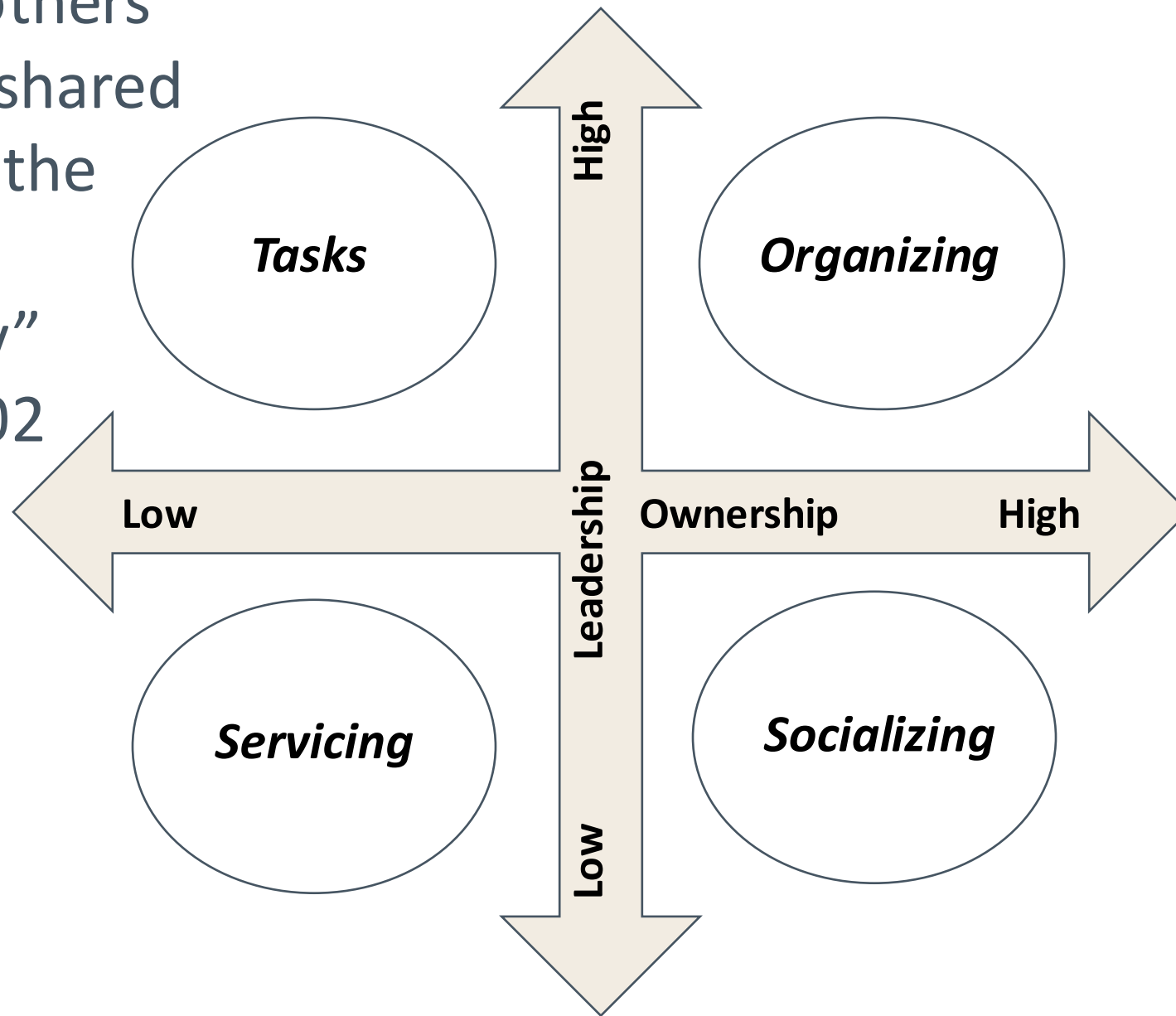
Communicate:

- Why the task is significant
- Why their input and contribution are key
- That multiple skills are involved...and you'll help coach them if needed

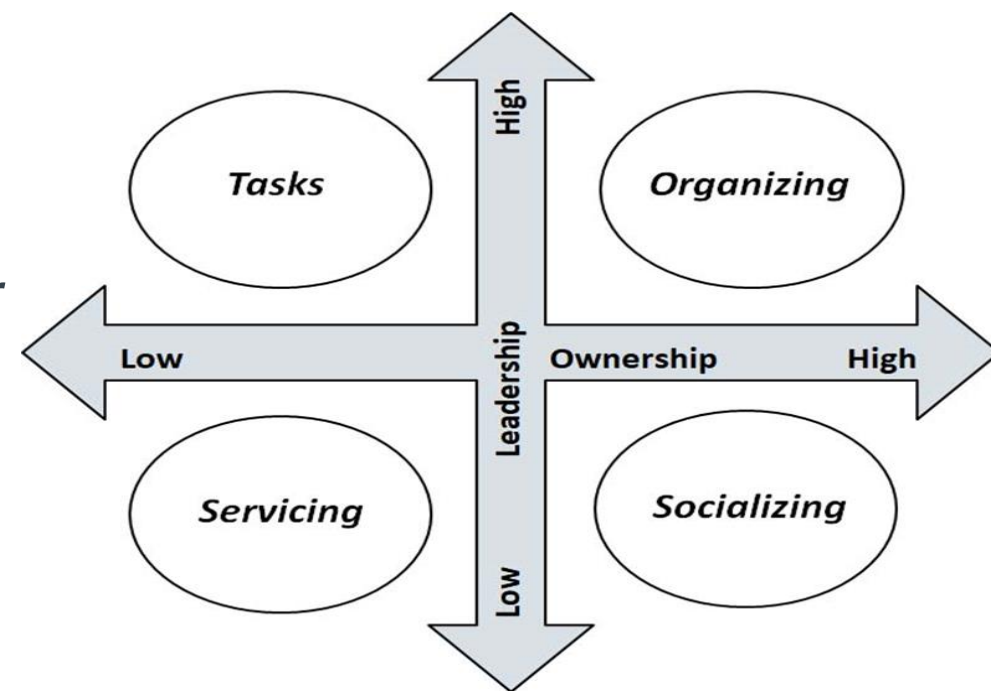
Nothing is meaningful if you aren't
expected to be accountable



“enabling others
to achieve shared
purpose in the
face of
uncertainty”
(Ganz) p.102



- As a team discuss how you could move those not in the organizing quadrant into the organizing quadrant or higher up either axis.
- How would you bring this back to your locals?
- Could it be a tool for you to self-evaluate or tool for a local to use with leadership to discuss?



KEY POINTS



- › Tasks must be meaningful and members need to own them.
- › Our job is to look for opportunities to increase ownership and leadership whenever possible.
- › Leaders grow by taking risk, accepting ownership, and sharing accountability.



**TAKE
A BREAK**

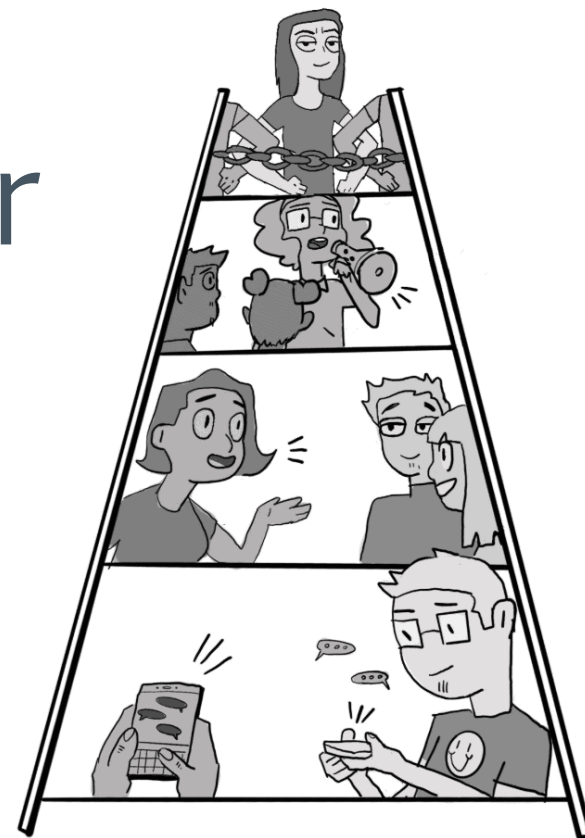
BREAK



A Strategic Ladder for Union Campaigns

Jessica & Hedy

LADDER OF ENGAGEMENT



What is the Ladder of Engagement? P. 106

A framework to help union leaders **activate and elevate member participation** through a series of intentional steps.

Each stage **builds trust, capacity, and ownership**—turning passive members into powerful advocates and leaders.

Steps to Solidarity

Campaign Ladder of Engagement



Step 1: Spotting the Ladder – *Recognizing the Path to Collective Power*

Objective: Introduce the campaign and spark initial interest.

Tactics:

- Send targeted emails or texts with campaign goals and relevance to educators.
- Share compelling stories or visuals on social media.
- Host informal info sessions or coffee chats at school sites.

Leadership Focus:

- Equip building reps and site leaders with talking points and flyers.
- Use warm, inclusive language that affirms educators' values and concerns.

Step 2: Gripping the First Rung – *Taking Hold of Shared Purpose*

Objective: Encourage members to express curiosity and take a first step.

Tactics:

- Invite members to sign a petition or pledge of support.*
- Conduct short surveys to gather input and build buy-in.*
- Offer low-barrier opportunities to attend virtual briefings or town halls.

Leadership Focus:

- Track engagement* and follow up personally.
- Celebrate participation publicly to build momentum.

Step 3: Climbing with Purpose – *Building Strength through Action*

Objective: Move members from passive support to active involvement.

Tactics:

- Recruit/Track volunteers for canvassing, phone banking, or event support.*
- Form working groups* around specific campaign issues (e.g., class size, funding).
- Host action nights or community forums.*

Leadership Focus:

- Provide clear roles, training, and support.
- Recognize contributions and foster team spirit.

Step 4: Standing Steady – *Holding Space for Collective Voice*

Objective: Cultivate consistent, reliable contributors.

Tactics:

- Invite members to take on formal roles (e.g., site coordinator, committee lead).*
- Offer leadership development workshops.*
- Engage committed members in strategic planning or negotiations.*

Leadership Focus:

- Build trust through transparency and shared decision-making.
- Create pathways for growth and mentorship.

Step 5: Reaching the Top – *Creating Opportunities for Others to Climb*

Objective: Enable members to lead, organize, and inspire others.

Tactics:

- Support members in organizing their own events or initiatives.
- Encourage representation at regional or statewide union gatherings.
- Develop a leadership pipeline with coaching and peer support.

Leadership Focus:

- Shift from directing to enabling.
- Celebrate leadership as a collective legacy.

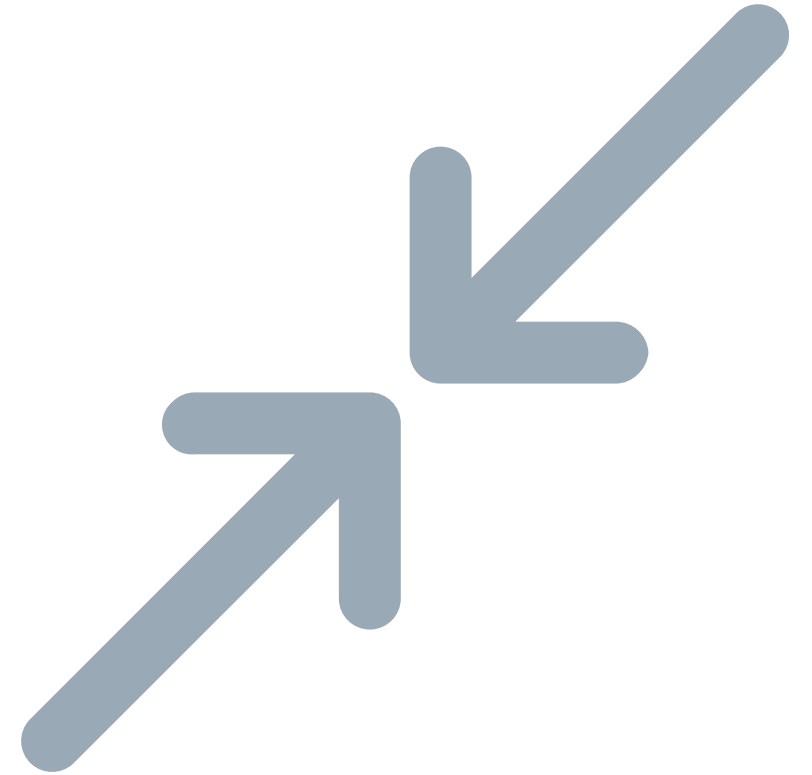
Let's Practice! P. 106

Welcome to the “Stories That Lift Us” ladder activity.

Together, we will plan how to engage members and community leaders in a book giveaway and storytelling event. Use this ladder to map out actions, leadership support, and communication strategies that build momentum and uplift diverse voices.

Ladder of Engagement Stage	Member activity to engage others.	Leadership action to support it.	Communication method to amplify it.
Spotting the Ladder (Spark curiosity and introduce the campaign.)			
Gripping the First Rung (Invite members to take simple actions to show interest.)			
Climbing with Purpose (Build momentum and visibility through collective action.)			
Standing Steady (Deepen commitment and create space for member leadership.)			
Reaching the Top (Empower others to lead and sustain the campaign.)			

Share Out!



Debrief

- › What ideas or perspectives shifted as your group built the ladder?
- › Which stage did you see a strong potential for impact?
- › What strategies felt most effective for supporting and amplifying member voices?
- › What's one action you feel ready to take after this session?
- › How can you help others climb the ladder with you?



Key Points: Using the Ladder Strategically



Map your members: Identify where individuals currently sit on the ladder.



Design your campaign: Align tactics with each stage to meet members where they are.



Track progress: Use engagement data to assess movement and adjust strategy.

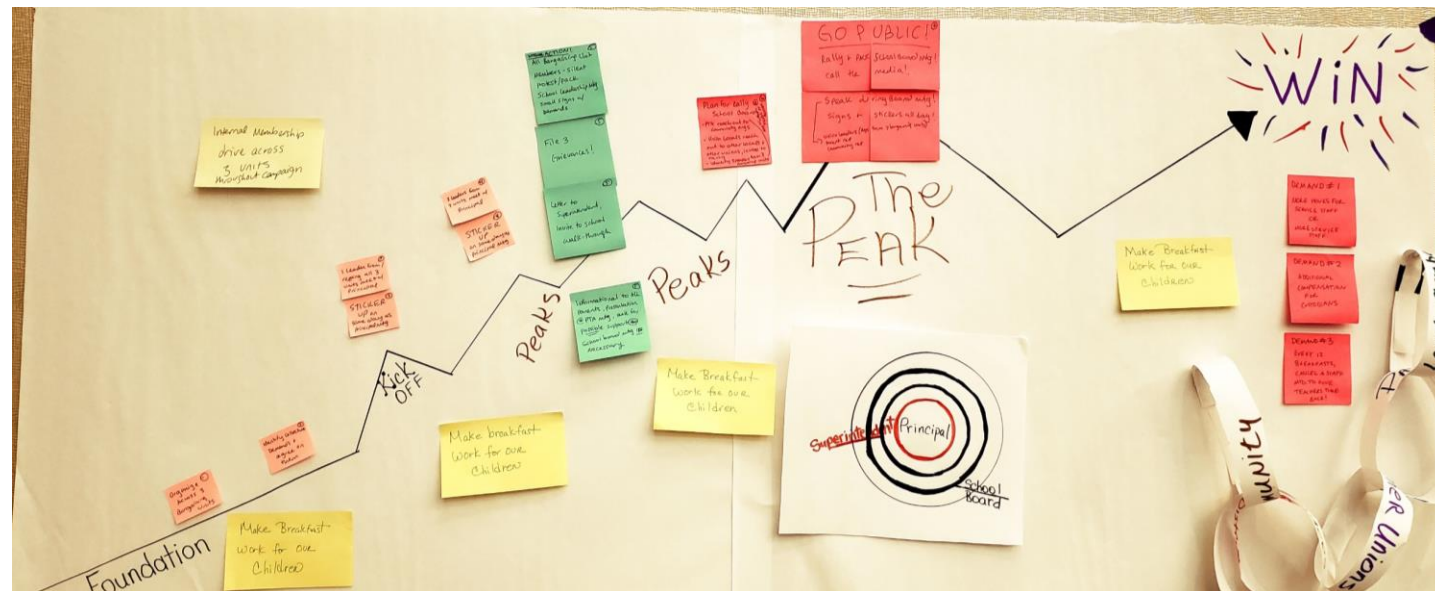
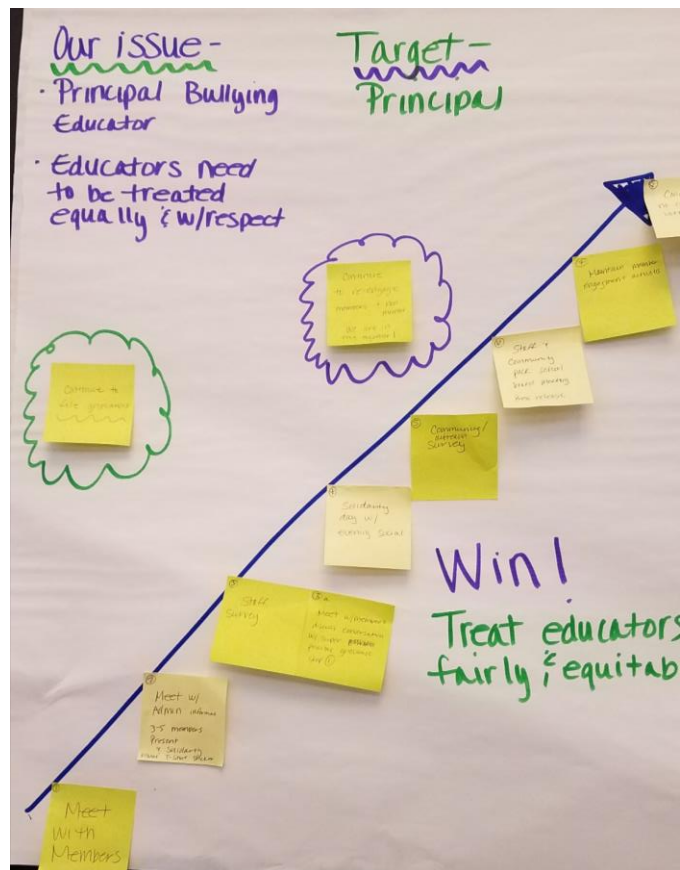


Build culture: Reinforce that union work is shared, valued, and visionary.



Campaign Planning Team Time

Beth & Sonia



Team Work Time

Team Presentation and Coaching Time



Feedback Questions

- What specific elements of the plan stood out to you?
- How did the plan engage others around the values they share?
- How did the plan address finding and developing leaders to help implement the plan?
- In what ways does the plan use opportunities to build structure and power?



Ending it Right

Ellen

Please share
your feedback
with us

Final Feedback for ESP Organizing Strategies



Campaign Lab Information and Application



<https://www.nea.org/resource-library/campaign-lab>



**KEEP
CALM,
IT'S**

**JUST THE END
OF MY POWERPOINT**

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