



Constituency Organizing: From Club to Fighting Union



This guide contains materials adapted for use from sources cited within and:
Marshall Ganz
Midwest Center for Organizing
Jane McAlevey

Participant Handouts

Organizers can encounter issue or identity constituencies that are stuck in the development of programming that results in great recruitment and retention of constituencies but never moves them into action. Participants will learn methods and skills for planning, base-building, and leadership development through a variety of scenarios and case studies.

Lead Contact:

Ellen Holmes
NEA Center for Organizing and Affiliate Support
eholmes@nea.org

Logistics Contact:

Karla Medina
NEA Center for Organizing and Affiliate Support
kmedina@nea.org

Director:

Tom Israel
NEA Center for Organizing and Affiliate Support
tisrael@nea.org

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.

Seeking Discomfort

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

Reaching Empathy

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

Expecting Non-Resolution and Non-Closure

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

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

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

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

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



Foundations



NATIONAL
EDUCATION
ASSOCIATION

Member Retention
Power
Constituency and Community
Frames of Unionism
Visions of Justice
Levels of Organizing
Raising Expectations
Club to Fighting Union



1201 16th St, N.W. | Washington, DC 20036 | Phone: (202) 833-4000

Lily Eskelsen Garcia
President

Rebecca S. Pringle
Vice President

Princess R. Moss
Secretary-Treasurer

John C. Stocks
Executive Director

Dear Association Leader,

*Whether you are a building representative, committee chair, or local officer, you bring the power of the union to life with our current members and our potential members. We've been listening to you and our members and we know that you want the tools and messages to build a relationship with each member to strengthen our union so that we can win for our members and our students. **This Spring, we conducted extensive polling in states where fair share fees will no longer be collected, and we learned which key aspects of our collective work as a union resonate with our existing members and strengthen their relationship with, and commitment to, the union.** We offer these message points and suggestions to assist you in the work you do at the worksite level. As you review this document, remember that listening to your colleagues, who are members or potential members, is just as important as the message you deliver. Thank you for the work you do as an association leader. The recommendations here are not only based on that most recent research but also on four years of research with our members across the country – both right to work and formerly agency fees states – including interviews, surveys and focus groups looking at membership growth and strength – so we know that every state will benefit from this information today.*

Member Retention Research Findings

Our research consistently finds that a member's bond with the association (how connected a member feels to his/her local) is the best predictor of a member's intention to remain in the union when given the opportunity to drop. Members who rate their connectedness at 10 are significantly more likely to remain in the union than those who rate their level of connection at 7, 8, or even 9. Merely connecting with our members is not enough. Instead, we must build—and maintain— *strong relationships and deep connections* with our members.

How do we build an enduring bond with members? Through our research, here is what we have learned.

1. **Face-to-face communication:** The more frequently and the more recently we have communicated with members, the more likely they are to want to remain in the union. While online and paper outreach can supplement in-person contact, they are not good replacements. In fact, members who were asked in person to join the union are more likely to have favorable

views of the union than those who received a card in the mail asking them to join. Even years later, this contact continues to impact how connected they feel to their union. ***There is simply no replacement for face-to-face communication.***

2. **Small group and one-on-one contact:** Robust and committed membership is built through small group and one-on-one conversations. Although large group meetings are often necessary, big meetings do not build connectedness. Gathering small groups of members together or having informal and authentic face-to-face conversations are imperative to making sure members feel a bond with their union.
3. **Listening and connecting > asking and telling:** When we are trying to connect with members, we should be listening, not telling. We often ask a member to do x or y for the union or tell a member that the union does x or y. Instead, forging a strong connection means being in listening mode—listening to a member’s concerns, gripes, successes, and achievements. At every level, members must feel heard. This can be as simple as informally asking a member how her day is going, or as substantive as asking what improvements she would like to see, or what changes would make her job easier, better, or more fulfilling. We cannot purport to be our members’ collective voice unless we are willing to listen to what they have to say.
4. **Support is key:** The strongest predictor of our members’ job satisfaction is whether they feel supported. Support means a range of things to members, but most fundamentally it means that someone hears them and has their backs. Support could be the presence of close friendships in the workplace, colleagues with whom to share lesson plans and tips, informal mentors, or people who will speak up when there are challenges at work. Our members are the best sources of support for one another and connections to the union encourage them to care about, support, and nurture their colleagues.
5. **Keep the relationship going:** All relationships require ongoing attention and maintenance; taking members for granted is a sure way of signaling that they don’t matter and weakening the bond they feel with their union. If we want members’ connection to remain intact—and even grow in intensity over time—we must reach out to them both continually and continuously. This not only builds lasting ties; it also helps build member advocacy and activism.

Key Message Points on Member Retention

Salary/Benefits

- Your membership allows the union to effectively negotiate with your district to secure and improve your salary, benefits, and working conditions. When more members choose to be a part of the union, we can achieve stronger contracts.
- Just look at #RedForEd: union members stood together to improve their salaries and benefits and make sure educators had a voice in their state legislatures.
- Like the saying goes, We all do better when we all do better. We can accomplish much more and get a lot more done by staying in our union and working together to achieve our goals.

Protecting Members

- Our union has our backs. Whether it's advocating for better salaries or making sure we are protected in the workplace, the union is there to make sure we are not alone.
- As educators, we need to make sure we are protected if we are ever falsely accused. The union gives us that protection and has our backs when we need it most.
- Together, we have the protection that comes from being part of a union that shares our values and advocates for the things we believe in—like support for our professions and resources for our students.

Educator Voice

- Decisions about schools and what's best for students should be made by the educators who work with our kids every day. But time after time, mandates are put in place with zero input from educators. Our union empowers us by offering a seat at the table and a more prominent voice in decision-making that affects our students and our jobs.
- It is easy for us as individuals to feel isolated, but as members of our union, we are never alone. Someone always has our back, and we can reach out for support from each other in challenging times.
- Sticking with the union gives us a louder voice and more leverage to change things for the better when we work with our school board or legislature.

Collective Voice

- Being a member of our union means having a channel for sharing your frustrations as well as your hopes, and having the power and collective voice to advocate for yourself and your students. So tell me: What are you concerned about, and what would you like to see change?
- Just look at #RedForEd and the role union members played in shining a light on what students and educators need for success. That shows the power we have collectively, and the way to keep it going strong is through our union.
- By sticking with our union, we can lean on each other, come together to meet our challenges, and advocate for the things that help our students—and us—succeed.

Concepts of Power

Gettysburg Project — March 10, 2014

Introduction

For purposes of working together, the following is one way we could conceptualize power to have a common language for understanding it, interpreting our experience of it, and facilitating its strategic use. In the Gettysburg project we encourage examining ways to strategize power more effectively “internally” with respect to our constituencies, across our organizations, more collaboratively, and to address challenges in the institutional contexts within which our organizations operate.

Understanding Power

Dr. Martin Luther King defined power as “the ability to achieve purpose” - adding, “whether it is good or bad depends on the purpose.” Understanding power requires looking at it as relational: influence created in the interaction of one’s purposes – or interests — and resources required achieving them. If I can realize my interests entirely with my own resources I have all the power I need. And if acting on my interests requires access to your resources as much as your acting on your interests requires access to mine, we can collaborate to create more “power with” each other than on our own. But if my need for your resources exceeds your need for my resources you get some “power over” me: you may access my resources to act on your interests at the expense of my own. So power is not a thing one has, a resource, but influence created at the intersection of what one has what one needs.

But neither interests nor resources are fixed. De Tocqueville argued that through association with others, one could “rightly understand” one’s “self-interest”: we not only may we learn more about our interests but we may also discover interests we have in common. So one well-known way to alter power relationships is to combine resources in pursuit of common interests so as to turn individual dependence into collective interdependence (boycotts, strikes). In reality, interests and resources are highly contextualized. So an interest can be understood as any goal-driving purpose rooted in one’s values - from financial security in the form of keeping a job to a need for the status in the form of tenure. And a resource can be anything useful for acting on one’s interests: economic, political, cultural, social, etc. Appreciation of this fluidity of meaning, and its “power”, is one of the key components of strategic imagination.

One example of turning a “power over” relationship on its head was action by Montgomery Bus Boycotters to turn individual dependence on bus riding (resource) to get to work (interest) into the bus company’s dependence for profits (interest) on collective bus fare (resource) withheld. At the same time boycotters created more “power with” each other by forming a car pool that linked the resources of those with cars who wanted to end segregation with those sacrificing to fight segregation, but needed rides to work. The common interest that sustained the car pool, however, grew out of participation in a struggle that went far deeper than the relatively narrow interest of “bus riders” to that of ending segregation itself.

Understanding power as relational grew out of the work of R.M. Emerson, often described as “dependency theory” as well as that of Bernard Loomer. Its value is in enabling us to discern

patterns of interdependence within which we operate to identify points of strategic leverage.ⁱⁱ

Observing Power

Sometimes we can easily observe power at work, as when one side wins a vote on a city council and the other side loses. But at other times, power is *hidden* in that it rests with those who decide what gets on an agenda in the first place, who gets to decide, and who sets the rules of making decisions. Still other times power may be *invisible* in that it has been “baked” into our understanding of “the way things are.” This is described as the three faces of power, detectable by asking three questions: who wins (face #1), who sets agendas (face #2), and who benefits/who loses (face #3). This approach is based on the work of Steven Lukes and John Gaventa.ⁱⁱⁱ

This way of looking at power can help distinguish strategy that focuses only on dealing with a symptom, like a segregated bus, from contesting the policy of bus segregation, from getting at the inequality of power responsible in the first place. For example, during the economic meltdown some people were getting thrown out of their houses by police, sheriffs, or security agents (face #1). Decisions as to when, where, and who would be evicted were made by banks in collaboration with courts, following the rules (face #2). But who held the power to set these rules in the first place, where did it come from, and how is it sustained (face #3)?

Structuring Power

Power is exercised in particular settings, arenas, or domains shaped by political, economic, social, or cultural structures. Structures can be understood as sets of rules, practices, norms within which actors mobilize resources to act on interests. Structures themselves result from earlier power struggles, the settlement of which resulted in new “structures.”

In the political context we often think of local, state, national, and global domains within which, and across which, power may be exercised. We may try to solve a local problem by mobilizing power locally, but if the problem is a result of power being exercised nationally, we would be wise to find allies beyond our locality. Work in this area includes that of Schattschneider, Skocpol, and others.^{iv}

We may have an economic problem, but find we must organize politically or culturally to acquire the resources to influence the interests of those responsible for our economic problem. In other words we may be able to translate “economic capital” into “political capital” or “cultural capital” into economic capital. Work focusing on domains in which power is exercised includes that of Weber, Mann, Bourdieu and others.^v

We also structure the use of power within and among organizations through which we may organize people to solve problems produced by other organizations created to pursue other interests. Who holds the resources that drive our organizations? Do we depend more on temporal or financial resources to do our work? Who decides how these resources are used, at what level, over what period of time? Work on the structuring of organizations that exercise “voice” (as opposed to goods and services providers) includes Michels, Lipset, Wilson, and

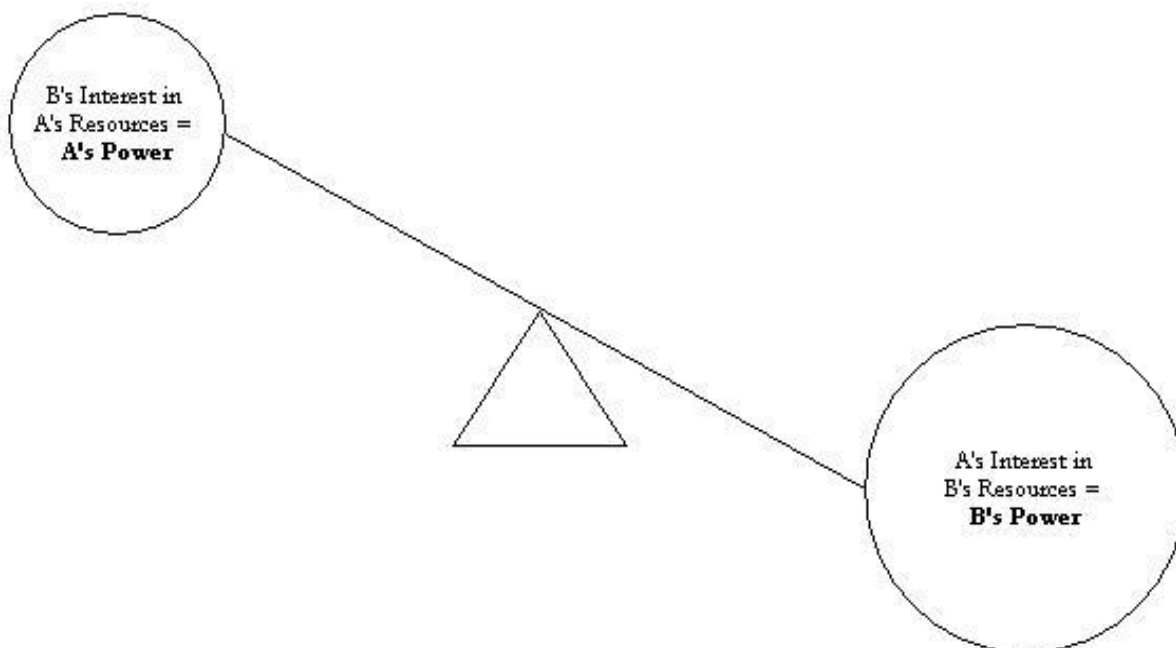
others. ^{vi}

Strategizing Power

Strategizing is how we turn what we have into what we need to get what we want – so it is all about power. Analyzing power in terms described above requires identifying the actors, their interests, their resources and the patterns of interdependency among them. We would look at the visible, hidden, and invisible ways power is being exercised as well as structural contexts in which it is operating. Strategy is often not so much about how to get more resources or even alter one's interests, but how to use one's resources so as to get all the leverage one can from them. In the chart below, it would be less about changing the size of the balls as is it would be moving the fulcrum.

Reconfiguring power, from an action perspective, begins with finding ways actors can redeploy their resources or redefine their interests. When we focus on a particular problem we may need to ask ourselves if it is only that problem we hope to solve or is it a general policy or rule affecting that type of problem, or is it the configuration of power, often structural, than created the problem in the first place. This is not a matter of long or short term strategizing but, rather, of how deep; i.e., how tactical or strategic we need to be in tackling problems we are tackling.

Relational Power



POWER WITH

Sometimes we can create the change we need just by organizing our resources with others, creating power with them. For example, creating a cooperative day care, or a community credit union, or a volunteer service bank.



POWER OVER

Sometimes others hold power over decisions or resources that we need in order to create change in our lives. In that case we have to organize our own power with others first in order to make a claim on the resources or decisions that will fulfill our interests.



CHANGING POWER OVER

When we have to engage with those who have power over us in order to create change, we ask ourselves four basic questions.



The Strategy Question:

5. What's our theory of change? How could we organize our resources to give us enough leverage to get what we want?

i.

ⁱⁱ Emerson, Richard M. 1962. "Power-Dependence Relations." *American Sociological Review*. 27: 31-41, Loomer, Bernard. "Two Conceptions of Power." *Process Studies* 6.1 (1976): 5-32. De Tocqueville, Alexis. *Democracy in America*, Volume II, Section 2, Chapter VIII.

ⁱⁱⁱ Lukes, Steven. 1974. *Power: A Radical View* (McMillan, New York); Gaventa, John, 1982. *Power and Powerlessness: Quiescence and Rebellion in an Appalachian Valley* (Gaventa, New York)

^{iv} Schattschnider, EE. 1975. *The Semi-Sovereign People: a realist's view of democracy*. (Cengage, New York); Skocpol, Theda. 1992. *Protecting Soldiers and Mothers: the origin of the American welfare state* (Harvard, Cambridge);

^v Weber, Max. 1887. "Class, Status and Party" in *From Max Weber* (1958), Gerth and Mills (Oxford, NY); Michael Mann, 1986 – 2013, *Sources of Social Power Vol.1 -4* (Cambridge, New York); Bourdieu, P. (1986) *The forms of capital*. In J. Richardson (Ed.) *Handbook of Theory and Research for the Sociology of Education* (New York, Greenwood), 241-258.

^{vi} Michels, Robert. 1915. *Political Parties* (Crowell-Collier, New York); Lipset, Trow and Coleman. 1956. *Union Democracy*. Wilson, James. 1974. *Political Organizations* (Princeton). Skocpol, Ganz, and Munson, 2000. "Nation of Organizers: the institutional origins of civic voluntarism in the US" (APSR, Sept, 2000).

Organizing Notes

People, Power & Change

Introduction

The first question an organizer asks is not “what is my issue” but “who are my *people*”? Identify the *people* whom you hope to organize, your *constituency*. What are their values, their interests, their resources, and, in particular, their challenges? Why might they want or need to organize? Do they live in a particular neighborhood? Do they do a certain kind of work? Do they share particular concerns such as parents, elders, young people? Do they share common values, such as preserving the environment? Why do they care? How do you know? Have you talked with them? Although the source of your constituency’s concern may be local, regional, national or even global, because all organizing is locally rooted, sometimes we link organized constituencies together in coordinated campaigns. Sometimes people in one place, like South Africa during the struggle against Apartheid, may organize in one way (strikes, civil disobedience) while supporters of that struggle around the world may organize in other way (boycotts, political pressure, etc.)

The second question an organizer asks is what kind of change do they need? What problems do they face? What challenges? Is their neighborhood deteriorating? Are their wages not keeping pace with the cost of living? Are their young people victims of official or unofficial gun violence? Are they morally outraged by the trafficking of young women? Is their children’s future at risk due to climate change? How would their world look if the problem were solved? Why hasn’t it been solved? What would it take to solve the problem?

The third question an organizer asks is not “how can I solve their problem for them” but “how can I enable them to work together to turn the resources they have into the power they need to achieve the change they want?”

You will need to map the power to begin finding answers to these questions: in addition to your constituency, what other actors may have a stake in the problem? What are their interests and resources? Who is responsible for the problem? Who holds the resources that might solve it? Whose interests might oppose solving it? Whose interests might be allied? Whose interests might be competitive? Whose interests might be in collaboration? And whose resources are relevant even if their interests are not clear: media, courts, the public, etc.

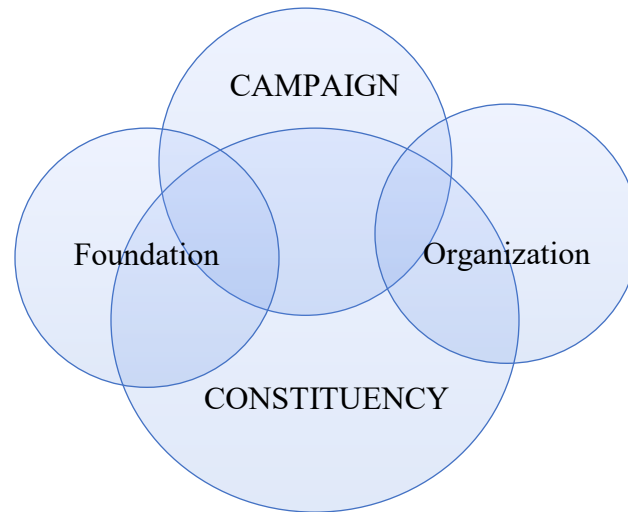
Adapted from Marshal Ganz; Organizing: People, Power, Change

Once you've mapped the power, based on analysis of the change needed, you must ask how your constituency could use their resources to create the power it needs to achieve that change: a theory of change. Could they collaborate to combine their resources to create enough "power with" each other to solve the problem: like forming a cooperative day care or organizing a credit union? Or does someone else have "power over" your constituency because they hold resources needed to solve the problem: a property owner, a bank, a public official, and an employer. Could your constituency collaborate to use their own resources in ways to affect that other person's interests enough to give them an interest in using their resources the way your constituency wants: like raising wages, passing a law, cleaning up their pollution, reducing the rent?

Based on this analysis decide on a strategic goal (specific, visible, plausible) on which to focus your effort; e.g., desegregating the busses, passing a local minimum wage ordinance, achieving union recognition, changing hiring practices, changing school text books, closing the local planned parenthood clinic, creating a new course, reallocating funding, etc. A strategic goal not only allows you to focus your efforts, but will also allow your constituency to leverage its resources, to build its capacity, and to motivate participation. Your "mountain top" or ultimate goal may be to stop gun violence in America, for example, but, given your circumstances, what more limited but strategic goal can you focus on that can contribute to building the power you will need to achieve your ultimate goal? To achieve your strategic goal you need to decide on the tactics you will use and sequence them as a campaign. Campaigns unfold over time with a rhythm that slowly builds a foundation, begins with a kick off, gathers gradual momentum with preliminary peaks, culminates in a climax when a campaign is won or lost, and then achieves resolution (Chart #7).

As Chart 1 shows, organizing is about enabling a constituency to develop the power it needs to assert its interests effectively, not only now, but also in the future. That's how power shifts. Organizers begin by building a *foundation* within their constituency. This usually requires many one on one meetings to learn people's concerns, discern the sources of the real problems, figure out the power dynamics, and identify, recruit and develop the leadership of a campaign. A *campaign* is a process through which your constituency can organize itself to create the power it needs to accomplish goals that will achieve the change they need. And turning their campaign into an organization gives them access to the capacity to build on their successes into the future.

Chart #1



Although you answer these questions in dialogue with your constituency, their leadership, and others, you need to bring an initial road map of where you want to go and how you imagine getting there as a working hypothesis so your journey can begin. To do that you need to strategize.

PEOPLE Who are the Actors?

Constituency

Organizers transform a community into a constituency. A community shares values or interests. A *constituency* is a community organized to use its resources to act on those interests (from the Latin for standing together). *Clients* (from the Latin for “one who leans on another”) have an interest in services others provide. *Customers* (a term derived from trade) have an interest in a good a seller can provide in exchange for a cash resource.

Constituents are the heart of organizations that serve them. Clients and Customers are usually external to these organizations. Constituents can become “members” of the organization just as citizens become “members” of a democracy. Voters are constituents of an elected official. Workers employed by particular employers may be constituents of a union (why wouldn't they be constituents of their employer?). People with environmental concerns may become the constituents of environmental organizations.

Adapted from Marshal Ganz; *Organizing: People, Power, Change*

Economist Albert Hirschman described three alternative responses to the need for change in a system: exit, voice, and loyalty. Constituents can influence the system through *voice*: making themselves heard through internal means. Customers and clients can only assert influence through *exit*, taking their resources elsewhere.¹ The organizers job is to turn a *community* – people who share common values or interests – into a *constituency* – people who can act on behalf of those values or interests.

Organizers assume that people are not mere “objects” of “social forces” that “cause” them to do things, but are, in fact, “agents” of change or “actors.” As actors we remember, imagine, choose, and reflect on choices. Although “social forces” influence our choices, our choices also shape “social forces.” Because we are not atomized individuals, floating in space, we exercise agency interdependently with others whose decisions affect our own. Can we understand the “drug problem”, for example, without taking into consideration the myriad dealers, smugglers, and producers who mobilize to frustrate every attempt to solve it?

Leadership

Although your constituency is the focus of your work, your goal as an organizer is identify, recruit and develop leadership from within that constituency – initially, a leadership team – who will organize everyone else. Their work, like your own, is to “accept responsibility for enabling others to achieve purpose in the face of uncertainty.” They facilitate the work members of their constituency must do to achieve their goals, represent their constituency to others, and are accountable to their constituency. Leaders of large – or small - bureaucratic organizations may have little relationship with clients or customers. Leaders of civic associations, on the other hand, can only earn leadership through relationships with their constituents - club officers, union stewards, members of a parish council, etc. Full time or part time people who do the day-to-day work of the organization may also serve as leaders, whether volunteer or paid, even if not drawn from the constituency if they are accountable to it -- full time local union presidents, chairs of mission committees, and the people who pass out leaflets on behalf of a candidate. Most organizations have a governing “body” that decides policy, chooses staff, and may or may not be involved in day-to-day activities. In bureaucratic organizations, the governing body may be self-selected, selected by outside groups, or by donors or investors - but rarely include leaders drawn from among their clients.

¹ Albert Hirschman, (1970), *Exit, Voice, and Loyalty*, (Cambridge, Harvard University Press), p.16.

Adapted from Marshal Ganz; Organizing: People, Power, Change

You work with the leadership team you recruit by coaching them in the five organizing practices you are learning: relationship building, storytelling, structuring, strategizing, and action. Developing their leadership is not only the way you, as an organizer, can “get to scale.” It is how you can create new capacity for action – power – within your constituency. This is a critical difference between organizing and other forms of problem solving. To the extent powerlessness is responsible for the challenges your constituents face, developing the leadership who can mobilize others can create power where there had been none - thus getting at a root cause of the problem that needs to be solved.

Key components in the three models of teacher unionism

INDUSTRIAL

PROFESSIONAL

SOCIAL JUSTICE

Orientation

Emphasizes separation of labor and management. The role of the union is to limit what teachers can be asked to do and to increase the pay/benefits they get for doing it.

Emphasizes and defends teacher professionalism and promotes teacher leadership at school and district levels through union/district mentoring programs, etc.

Emphasizes alliances with parents and community to organize for social justice in schools, the community, and the curriculum. Challenges white supremacy and other forms of oppression.

View of Management

Assumes labor/management relations are hostile and adversarial.

Encourages management/labor cooperation to promote quality programs and achievement.

Partners with management when they promote anti-racist social justice policies, and organizes with parents and communities against management when they don't.

Bargaining

Win/lose bargaining with emphasis on bread-and-butter issues of salary, hours, and working conditions. Views the contract as way to institutionalize changes.

Interest-based bargaining that addresses teaching quality and programmatic initiatives, include MOUs outside of the contract. Views the contract as way to institutionalize changes.

Bargaining for the common good. Bargains bread-and-butter and professional issues, but balances those demands with the broader social justice issues in the schools and community. Views the contract as way to institutionalize changes, but rank-and-file and community organizing as key features in sustaining wins.

INDUSTRIAL

PROFESSIONAL

SOCIAL JUSTICE

District Decision-Making

Management prerogatives respected at school and district levels. Union staff grieves management decisions.

Seeks to expand decision-making and instructional leadership at school and district levels. Joint labor/management committees address professional issues.

Democratic input by key stakeholders through democratically elected school boards, shared leadership at school level, and district councils and committees that include educators, administrators, parents, community, and students. Promotes creation of transformative community schools.

Internal Union Leadership

Often a “business model” that is staff- and/or leader-dominated with limited member decision-making. Promotes member passivity except for occasional mobilizations. Members view “the union” as a third party—the staff and elected leaders.

Promotes moving significant leadership to the school level and works to infuse the district operations with teacher leaders.

Broad membership engagement and involvement in decision-making. Vision and direction provided by elected leadership; diversity and debate encouraged. Members view the union as “first person plural”—We are the union.

Service to Members

Staff “solves” most individual problems through contract enforcement.

Emphasis on school-based problem-solving.

School-based leaders are trained to organize staff to solve most problems at the school level. Districtwide problems are solved through pressure and collective action.

Equity and Race

At worst, defends white privilege; most commonly ignores such matters.

Main proponents of professional unionism are silent on race issues.

Strong emphasis on race and equity-supporting movements in the community on issues that don’t directly affect teachers. Openly deals with racial issues internal to the union.

INDUSTRIAL

PROFESSIONAL

SOCIAL JUSTICE

Pedagogy and Curriculum

Union cedes control of curriculum and professional development to management.

Union promotes additional responsibility for teacher leaders and brings teacher voice to design, implementation, and evaluation of curriculum, assessment, and instruction.

Union promotes more teaching and less testing, restorative practices over punitive discipline, and culturally relevant, anti-racist social justice curriculum that is participatory and connected to students’ lives.

Student Rights/School Safety

Focus is on teacher authority, classroom control. Teachers quick to refer students for discipline, without listening to students. Leads to zero-tolerance policies and enables school-to-prison pipeline.

Silent on the subject.

Promotes restorative practices and anti-bias training of staff, and fights for the “schools the students deserve,” which includes full social and health services, counseling, and respect for students’ personal rights.

Social Issues, Community, and Parents

Limited involvement with social and community issues; parent outreach is emphasized only during bargaining or other contractual dispute with management.

Mainly silent on broader community issues. Works with parents to improve individual parent support for their child’s learning.

Reaches out to community and parents to improve the quality of teaching and learning; supports social justice movements in the community even if not directly involved with schools and encourages members to participate in such movements.

INDUSTRIAL

PROFESSIONAL

SOCIAL JUSTICE

Relations with the Labor Movement

Supports labor struggle when in the self-interest of teachers. (Historically NEA rank and file not encouraged to view themselves as part of the labor movement.)

Silent on the subject.

Views teacher unions as on the front lines to revitalize the labor movement. Stands in solidarity with labor struggles—both union-based and community-based, like \$15 and a Union.

SOURCES

- Kerchner, Charles Taylor and Julia E. Koppich. 1993. *A Union of Professionals: Labor Relations and Educational Reform*. Teachers College Press.
- Rethinking Our Unions Institute of the National Coalition of Education Activists, Portland 1994.
- Charney, Michael and Bob Peterson (eds.). 1999. *Transforming Teacher Unions: Fighting for Better Schools and Social Justice* (first edition). Rethinking Schools.
- The Three Frames of Progressive Unionism, from the NEA's Center for Organizing.

Visions of Justice:

Unions and the community in historical perspective

BY DAN PERLSTEIN



TAMIMENT LIBRARY, NEW YORK

American teacher unionists have at times joined with working-class community activists in a common battle to win more equitable and democratic schooling for all children. At other moments, teacher unionists have defended the centralized administration of schools against activists demanding community involvement in educational affairs. Unions both have been active participants in efforts to promote racial and gender equality and have opposed such initiatives. In a society marked by profound social divisions, notions of social justice in education are inevitably as varied as those proposing them.

Two tensions have been especially pivotal for teacher unionists. Although advocates of social justice in education sometimes seem to expect teachers to fore-

swear any self-interest out of dedication to the children they teach, unionism sees teachers as agents and as beneficiaries of social justice. At issue is how teachers have understood the relationship of their self-interest (sometimes represented as business or bread-and-butter unionism) to broader political concerns (sometimes described as social justice or social movement unionism).

A second tension involves teachers simultaneously making demands upon the state while serving it. That teacher unions won the right to bargain with the state at a moment in the 1960s when the American welfare state was rapidly expanding its disciplinary power mirrors the ambiguous role that the American state has played in efforts to secure social justice more broadly. Questions involving the relationship of self-interest to social justice and the relationship of working people to the state have shaped the history of teacher unions and their participation in movements for social change.

In no city have the varied ideologies and alliances of American teacher unionism been more visible than in New York, and no city has played a more prominent role in the history of teacher organizing. New York's United Federation of Teachers (UFT) local continues to occupy a preeminent place in the American Federation of Teachers (AFT). Life in the epicenter of American teacher unionism has been in many ways atypical of conditions in the rest of the United States. Still, focusing on exceptional moments in American teachers' history can illuminate the obstacles to the pursuit of social justice teacher unionism as well as its richest potential.

Unionism, Professionalism, and Gender Equity

Teacher unions arose at the beginning of the 20th century, when elite schools responded to the social conflicts of America's burgeoning cities with new mechanisms of centralized governance and administration, new bureaucratic procedures to sort students and divide work, and new forms of technical and professional knowledge to guide and manage educators. As historian Marjorie Murphy demonstrates, elite reformers hoped to isolate teachers, most of them women, from the working-class communities in which they taught, to win teachers' allegiance to male central office professionals, and thus to have schools help maintain order in America's fractious cities.¹

Teachers were torn between old neighborhood allegiances and the promise of a new professionalism. Unlike Chicago, where elementary school teacher Margaret Haley led a militant, community-based campaign that forced corporations to pay their school taxes and won a pay raise for teachers, leading New York teacher unionists shared the professional aspirations of elite reformers. Today's AFT flagship local, the UFT, traces its history to the Teachers Union (TU) and the Teachers Guild, inheriting from the two earlier organizations its commitment to professionalism. The TU was organized in 1916. Its founder Henry Linville possessed a Harvard PhD, and over the years, as the UFT brags, top teacher unionists included "PhD's, accountants, and even lawyers—men like Jules Kolodny, Dave Wittes, and Charles Cogen."²

The male-dominated TU showed little interest in gender equity. At the same time as the TU struggled to attract a handful of teachers to the labor movement,

New York's Interborough Association of Women Teachers, under the leadership of Deputy Superintendent Grace Strachan and with the support of Carrie Chapman Catt and other suffragists, organized 14,000 women teachers with demands for equal pay. Commitment to the social justice ideal of gender equity served the self-interest of most teachers, but also required participation in a movement of white women to transform their political status.³

Acceptance of male privilege and insensitivity to women's concerns, together with the intersection of gender and racial dynamics, have been ongoing issues in teacher union politics. Although women filled 50 percent of the TU Executive Board as early as 1925, and in the 1930s they outnumbered men at union meetings, when Linville's ideological descendants founded the UFT New York organizers once again dismissed women as potential unionists. "When teachers loudly and publicly bicker with each other, when tongue-clucking 'talk' and futile hand-wringing are substituted for vigorous action," UFT President Charles Cogen argued in urging teachers to abandon other organizations, "how can we expect anything but contempt?" Cogen labeled an "old woman" a teacher "of any sex or age who . . . accepts unquestioningly . . . [the] dictates of anyone in authority over him, and who refuses to protest—even mildly—any unwarranted transgressions into his professional domain." In the early 1960s, the UFT's founders focused their efforts on angry young men in the junior high schools—and were completely unaffected when thousands of female elementary school teachers participated in early UFT actions. When, in the late 1960s, the UFT was locked in bitter conflict with Black community activists rather than with central administrators, union leaders would again view inflexibility as a virtue rather than a failing.⁴

The Teachers Union

Today's UFT traces its ideological and organizational roots to New York's Teachers Union, formed by Linville and other social democrats. Through electoral campaigns and labor organization especially, social democrats sought to extend political democracy to economic life. They believed that the United States could evolve gradually toward socialism without a fundamental reordering of its political structure; that if distinctions of class could wither, other, more superficial social divisions would disappear even more easily; and that the U.S. might achieve a universally held culture, with universal standards of judgment, into which all would assimilate. Racial problems, in this view, were largely caused by and subservient to class conflicts. The social democratic response to American racism received its most famous expression from Eugene Debs, who proclaimed socialism a "slavery-destroying" movement capable of offering "inspiring music" to Black Americans "doubly enslaved" by the "unspeakable crimes" of the white race. Still, he claimed, "The Socialist Party is the party of the whole working class, regardless of color," and therefore it had "nothing special to offer the Negro."⁵

Aspiring to professional respectability while espousing a mildly reformist vision of socialism, New York's social democratic teacher unionists placed more faith in discrete lobbying campaigns than in mass demonstrations. Until the 1930s,

Linville and his followers retained firm command of the Teachers Union, but amid the growing activism and radicalism of the Depression years, teachers began to demand that the union take a more militant stand on school issues and broader political questions. When a communist-led rank-and-file coalition won control of the TU in 1935, the original socialist leadership bolted and formed the Teachers Guild, an organization that soon won the backing of the American Federation of Labor and in 1960 gave rise to the UFT.

Following the 1935 split, commitments to social justice animated both TU and Teachers Guild activities. But they were not always the same commitments. The communist-led TU, notes historian Clarence Taylor, attracted large numbers of teachers by simultaneously fighting to improve salaries and working conditions while also offering a compelling analysis of racism and class oppression and building a movement of civil rights, community, and labor activists to end poverty, racial discrimination, and other forms of social, economic, and political oppression. Despite the exodus of the social democratic faction and opposition from school officials, the TU grew from perhaps 1,500 members in 1935 to more than 6,000 in the late 1930s.⁶

One of the most significant differences between the TU's new leadership and Linville's more moderate group was its response to school racism, which the TU now made a major focus of its work. Although Blacks constituted only a small percentage of New York's students in the 1930s, school segregation and discrimination were already well established. "Old, poorly equipped, and overcrowded" schools were a primary source of Black discontent, a 1935 city investigation reported, and "many of the white teachers" assigned to Harlem schools "regard the appointment as a sort of punishment."⁷ Even after he became disillusioned with communism and left the party, former communist leader George Charney fondly recalled TU's militant activism:

Pressing their demands for better schools, more schools, textbook revisions, Negro teachers and principals, free lunches, and so forth . . . mothers came [to meetings] en masse to organize programs, assign delegations, and join in citywide activities. In every school, white teachers, with the active support of the Teachers Union, came forward to collaborate with the parents in this inspired effort to transform a community through education.⁸

Alice Citron, a leader in the overlapping communist and Teachers Union circles of the 1930s, epitomized Depression-era anti-racist school organizing. In her Harlem classroom, Citron replaced textbooks written by New York school administrators that portrayed happy, dancing slaves and defended the Ku Klux Klan with lessons inspired by Carter G. Woodson's *Negro History Bulletin*. After school, she compiled bibliographies on Black life for other teachers, organized campaigns to rectify derelict school facilities, and earned a reputation throughout the streets of Harlem for her role in battles against American racism.⁹

The theory on which the TU based its anti-racist campaigning originated in the American Communist Party. Extrapolating from the role played by national minorities in the Russian Revolution and influenced by demands for African American self-determination, communists reasoned that the union of the anti-capitalist working-class protest and Black community organizing could catalyze a movement to overturn class and race oppression in America. Even if the communist vision of self-determination for an “oppressed Negro nation” has rightly been dismissed as “a bit of ‘fatuous romance,’” notes historian Mark Solomon, it led communists “to deal with racial issues and attitudes in ways that were totally beyond the awareness and comprehension of most white Americans,” and gave rise to “the most determined efforts of a predominantly white organization to achieve equality since the abolitionists.”¹⁰

TU members joined with parents and community activists to organize pickets against the brutal corporal punishment of Black students and to secure the construction of Harlem’s first new schools in decades. For almost 20 years, TU-led coalitions remained New York’s most militant and effective grassroots school reform effort. Although most teachers never joined the TU’s radical campaigns, its prin-

cipled efforts improved working conditions, enriched teachers’ work and aligned teachers with efforts to democratize the wider society.

But the TU’s ability to simultaneously promote the interests of white teachers and of Black communities provided it little protection from the anti-communist hysteria of the McCarthy era, when hundreds

Teachers Union members joined with parents and community activists to organize pickets against the brutal corporal punishment of Black students and to secure the construction of Harlem’s first new schools in decades.

of activist teachers were forced out of the New York school system and parents were cowed into ending association with “subversives.” In 1950, the Board of Education declared that school administrators were no longer permitted to “negotiate, confer, or deal with or recognize [the Teachers Union] in relation to any grievances or any personal or professional problems, nor grant to said Teachers Union any of the rights or privileges accorded to any teacher organization.” The ban, which lasted until 1962, destroyed the TU and cleared the way for the rise of the UFT.¹¹

The Teachers Guild and the UFT

Even in the heyday of the TU, Guild activists were promoting an alternative vision of teacher unionism, one that would lead directly to the establishment of the UFT and through it to the transformation of teacher organizing across the U.S.

Within the Guild, a younger generation of teachers combined the mild reformism of Linville’s generation with the militancy of their communist competitors. The Guild, according to veteran socialist and future UFT leader Jeannette

DiLorenzo, “was a social movement as well as a trade union movement.” Like many future UFT leaders, DiLorenzo had grown up in a home where “the religion” was “being part of an international movement.” She studied socialism and Marxism at the Rand School and honed organizational and leadership skills in the Young People’s Socialist League. Through countless meetings, debates, and bare-knuckle ideological and organizational battles, future UFT and AFT leaders mastered a vision of teacher unionism that they would maintain steadfastly through future decades. “I never stopped to analyze whether it was good people I was working for,” DiLorenzo would remember. “It was the idea; it was working for a better world.”¹²

When the Civil Right Movement arose in the South in the 1950s, the Guild’s response was shaped by its continuing commitment to the Debsian ideal of equality for workers of all races. Prodded by the Guild, the AFT voted as early as 1951 to charter no new locals that practiced racial discrimination, and by 1956 the union ordered Southern affiliates to desegregate or be expelled. The AFT’s efforts contrasted with those of the National Education Association (NEA), which did not fully desegregate until the 1970s.¹³

A vision of uniting all teachers and a strong commitment to unionism remained hallmarks of the New York AFT local when the Guild reconstituted itself as the UFT in 1960. “The goals of the embattled teachers,” UFT founder Dave Selden claimed, “were the usual worker goals—higher wages, better benefits, and improved working conditions. Perhaps the ultimate goals were higher status and dignity.”¹⁴ AFT President Carl Megel argued in 1962 against equating teachers with such professionals as doctors and lawyers: “A doctor or a lawyer is a businessman. A teacher is a worker. You are a day laborer.”¹⁵

When the UFT initiated its organizing campaign, it received tremendous support from the labor movement. Unions donated tens of thousands of dollars and lent field workers for the 1961 election in which the UFT won the right to represent New York’s 43,000 teachers. Noting that white-collar employees had come to outnumber blue-collar workers in the U.S., Cogen acclaimed the election as labor’s biggest collective bargaining victory since the United Auto Workers organized Ford’s River Rouge Plant in 1941.¹⁶

While portraying teachers as workers, UFT leaders also sought to promote teacher professionalism. If a teacher were “considered a production worker,” Selden conceded, issues such as class size would be non-negotiable questions of educational policy rather than issues of working conditions. “But a teacher is not merely a production worker. He is a professional,” and like other professionals, Selden argued, teachers had a right to be “self-directed and use their judgment in their work.” By this definition, he argued, teachers might rightly negotiate over class size not because large classes “sweated” teachers into undue hardship but because teachers rightly had a say in pedagogical issues.¹⁷

Unionists’ understanding of teachers’ work was not the only reason they invoked teacher professionalism as well as industrial unionism. The emergence of teacher unionism signaled important changes in American economic and political life. After World War II, automation and deindustrialization led to a decline in the

number of factory jobs, and together with McCarthy-era repression and pro-management changes in labor law, to an even steeper drop in blue-collar unionism. Meanwhile, the number of state and local government jobs mushroomed. New York City alone lost 40 percent of its 1 million manufacturing jobs between 1950 and 1969, but increased its 375,000 government jobs by 40 percent.¹⁸

Union leaders were keenly aware of changes in the labor force, changes that made organizing groups such as teachers crucial to the future of the labor movement. When International Brotherhood of Electrical Workers President James Carey addressed the NEA's 1962 convention, he pointed to the UFT's New York campaign as a model for teachers across the U.S. The NEA's simple professionalism, Carey argued, "implies that your *craft* is somewhat above this world of ours; it implies a detachment, a remoteness from the daily battle of the streets, in the neighborhood, and in the cities." Without unions, he warned, teachers would lack decent wages and thus the ability to "afford integrity and honesty" in their work.¹⁹ Another union official made the big picture plain. "How long will the file clerk go on thinking a union is below her dignity," he asked *BusinessWeek*, "when the teacher next door belongs?"²⁰

The synthesis of industrial unionism and professionalism proved immensely popular with teachers in New York and across the U.S. Still, teachers' self-directed activity involves the direction of other persons. Like the Progressive Era reorganization of urban schooling, the new professional unionism distanced city teachers from the urban communities in which they worked. Nowhere was the potential for conflict between urban teachers and the families they serve more clear than in New York.

By the late 1960s, the racial politics of education, together with wider changes in urban life, had undermined Black activists' faith in the goodwill of white teachers. The UFT never applied to local race relations problems the militant commitment to racial equality that informed its response to Southern struggles. Among the accomplishments of which the union boasted to teachers, for instance, was its having "killed the superintendent's plan to force teachers to transfer to difficult schools."²¹ In 1964, when more than 400,000 of New York's 1 million students boycotted school in order to press for integration, the UFT declined to endorse the protest.²²

Following the defeat of the campaign to integrate New York's schools, Black activists increasingly demanded that school curricula and jobs be controlled by Blacks themselves. In 1968, experimental local school boards in Harlem and Brooklyn's Ocean Hill-Brownsville neighborhood became the focal points of New York's political life. After the Ocean Hill-Brownsville board attempted to remove 13 teachers from the district's schools, the UFT went out on strike for much of the fall of 1968. By the end of the year, the UFT had won its strikes and effectively ended the movement for decentralized "community control" of schooling.

In defense of the union's position, UFT leaders argued that the same vision of professional autonomy, race-blind due process, and solidarity that had led them to support the Civil Rights Movement (and that would soon lead the AFT pioneer trade union advocacy of gay workers' right to be judged by their work alone and not their identity)²³ justified union opposition to community control. Neverthe-

less, in the context of the school conflict, invocations of professional autonomy increasingly dominated Debsian notions of working-class solidarity. Teachers, future AFT president Sandra Feldman claimed on the eve of the 1968 conflict, “in general support civil rights and equal educational opportunity, but their commitment to a fight for improved schools was . . . largely, and understandably, self-interest . . . a struggle to create a respected profession from a beleaguered, downgraded occupation.”²⁴ “We don’t deny their equality,” a white teacher claimed while walking a UFT picket line, “but they shouldn’t get it by pulling down others who have just come up. It’s wrong and reactionary for them to pit their strength against a group that struggled for years to make teaching a profession.”²⁵ “It has always been the intent of the UFT,” Al Shanker claimed in the face of Black demands, “that community participation does not mean that those decisions under professional control should be surrendered.” Union teachers, he declared, “will not continue to teach in any school or district where professional decisions are made by laymen.”²⁶

In addition to the heightened passions of the moment, the very conditions of urban school teaching contributed to teachers’ willingness to distance themselves from the communities in which they worked. By the late 1960s, a majority of New York’s students were Black or Latino; meanwhile, most teachers were white. An increasingly wide physical, cultural, and political gulf separated teachers, who could abandon cities for suburban retreats, from their students, who lived in decaying urban neighborhoods. The majority of teachers, New York teacher activist and future urban school reformer Deborah Meier has observed, brought prejudices against poor minority children to their work, and “rather than undermining these prejudices,” the teaching experience “arouses them.”²⁷ Amid the troubling and visible tragedy of widespread minority student failure, adherence to seemingly uniform, race-blind standards of instruction asserted teachers’ professionalism while absolving them of responsibility for their ineffectiveness.

The same economic changes that led the labor movement to organize teachers and other white-collar workers also undermined the UFT’s invocations of working-class interracial solidarity as a vehicle for advancing Black freedom. As factories disappeared, industrial democracy could no longer animate the imagination of New York’s poor. Their grievances—welfare rules, police brutality, poor city services, urban renewal, and school policies—were the results of an oppressive state rather than an oppressive boss. Community activists in New York and across the U.S. increasingly abandoned residual faith in the promise of racial integration and

By the late 1960s, the racial politics of education, together with wider changes in urban life, had undermined Black activists’ faith in the goodwill of white teachers. The UFT never applied to local race relations problems the militant commitment to racial equality that informed its response to Southern struggles.

embraced demands for Black Power. The people of Ocean Hill-Brownsville were a “community,” as Black teacher activist Rhody McCoy argued, because “they were involved in struggles with poverty programs, with political machines. They’ve had common goals and interests.”²⁸

Despite the changes in urban life, UFT leaders insisted throughout the 1968 conflict that the social democratic politics of interracial solidarity remained the surest means of securing real power for Black Americans. Community control, Feldman argued, “strengthens segregation and places upon poor communities the burden of creating desperately needed, massive, substantive, programmatic changes in their schools.” Only the federal government, Feldman insisted, “can provide the kind of resources needed” to substantially improve inner-city education “and only a massive coalition of forces can prod Congress into action.”²⁹

By 1968, however, the commitment of the U.S. to social welfare programs and racial equity had already begun to ebb. When AFL-CIO leaders endorsed the UFT’s 1968 fight against community control, it was because of the union’s importance “not only for the future of teacher unionism but for the growth and expansion of white-collar and public service employee unions as well.” Labor leaders’ endorsement of the UFT signaled both the rise of public employee unions and the declining power of labor in American life.³⁰

The 1968 school crisis established the UFT’s powerful role in school politics and urban life, a role that benefited teachers in later salary renegotiations. Victory in 1968 was, however, expensive for New York’s teachers. In the years following the school conflict, racial tensions demoralized school work and undermined the very liberal coalition that the union claimed to seek. In an earlier time, the UFT’s rhetoric of equal opportunity, due process, industrial unionism, and professionalism might have enabled members to transcend narrower views and individual bigotry. In 1968, the UFT’s anachronistic invocation of interracial working-class solidarity distanced teachers from the poor communities in which their students lived and legitimized racial inequality in the contested world of the schools.

The Past and Future of Social Justice Unionism

Self-interest alone is inadequate as a guide to personal action or social analysis in part because self-interest is never really clear. “Conditions,” philosopher and AFT founder John Dewey observed, are not “fixed or even reasonably stable. . . . Social conditions are running in different, often opposed directions. Because of this fact the educator . . . is constantly compelled to make a choice. With what phase and direction of social forces will he throw in his energies?”³¹ Teachers’ notions of their self-interest, the movements in which they participate, and the alliances they make inevitably reflect their interpretations of social reality.

Combating perceived threats from below left teacher unionists exposed to threats from above. With its 2018 *Janus* decision by requiring unions to offer services for which they are not paid, the Supreme Court joined the long-standing right-wing campaign to destroy the unions of teachers and other public employees. And even before *Janus*, teacher unions’ lesser-of-two-evils fealty to the Democratic

Party and the state led them to give far more than they have received. In recent decades, Gates, Broad, the Waltons, and other billionaires have imposed their vision on the schools, while corporations have feasted at the schoolhouse trough. They and their advocates in government have promoted charter schools, vouchers, the outsourcing of teaching to the gig economy, and other neoliberal “reforms” that have undermined not only teacher unions but also the century-old system of school district governance and administration that constituted the conditions out of which the unions emerged.

In 2012, Chicago Teachers Union President Karen Lewis, who is Black, led teachers in a strike against the complicity of government and union officials with the privatization of the city’s schools. Since then, soon after the election of Donald Trump gave rise to the notion that the white working class had fully embraced racist reaction, teachers in West Virginia, Oklahoma, Arizona, back in Chicago, and across the country have walked off their jobs to demand justice for themselves and their students. Some of these strikes were launched and directed by unions; others were wildcat actions in places that ban public sector strikes.³²

Teacher unions have at times challenged the inequalities of American life, and fostered broader demands for the public good. At other moments, they have allied themselves with the state to place teachers’ immediate interests and privileges above more expansive ideals. At times, teachers have been served reasonably well by such visions, even if their more disadvantaged students have not been. But teachers are also harmed by theories that lead them to ally themselves with class, gender, and racial privilege. In order to protect both material self-interest and the joy of their work, public school teachers must, in the long run, protect the public interest. Will today’s attacks on schools and the political and economic conflicts they reflect lead teacher unionists to imagine ideologies responsive to today’s realities? It is too early to know whether recent strikes herald a new form of teacher unionism and with it a new relationship to the groups and movements seeking social justice in America. The history of teacher unionism raises questions that only its future will answer. 

Dan Perlstein is a historian whose work focuses on American education. He teaches in the University of California, Berkeley’s Graduate School of Education.

ENDNOTES

¹ Murphy, Marjorie. 1990. *Blackboard Unions: The AFT & the NEA, 1900–1980*. Cornell University Press: p. 23.

² Schierenbeck, Jack. Feb. 19. 1996. “Class Struggles: The AFT Story, Part 1.” *New York Teacher*. uft.org/your-union/about-uft/our-history/class-struggles-uft-story/class-struggles-uft-story-part-1

³ Carter, Patricia. 2002. “Everybody’s Paid but the Teacher”: *The Teaching Profession and the Women’s Movement*. Teachers College Press: p. 41–45; Santangelo, Lauren. 2019. *Suffrage and the City: New York Women Battle for the Ballot*. Oxford University Press: p. 71–73.

⁴ Cogen, Charles. May 1960. “The President’s Column.” *United Teacher*: p. 2; Cogen, Charles. June 1963. “The Teacher’s Public Image.” *United Teacher*: p. 3.

Visions of Justice: Two Tensions for Teacher Unions

“Two tensions have been specifically pivotal for teacher unionists. Although advocates of social justice in education sometimes seem to expect teachers to forswear any self-interest or dedication to the children they teach, unionism sees teachers as agents and beneficiaries of social justices. At issue is how teachers have understood the relationship of their self-interest (sometimes represented as business or bread and butter unionism) to broader political concerns (sometimes described as social justice or social movement unionism).

A second tension involves teachers simultaneously making demands upon the state while serving it... Questions involving the relationship of self-interest to social justice and the relationship of working people to the state have shaped the history of teacher unions and their participation in movements for social change.” (pg.43)

“Teacher unions have at times challenged the inequalities of American life, and fostered broader demands for the public good. At other moments, they have allied themselves with the state to place teachers’ immediate interests and privileges about more expansive ideas. At times teachers have been served reasonably well by such visions, even if their more disadvantaged students have not been. But teachers are also harmed by theories that lead them to ally themselves with class, gender, and racial privilege. In order to protect both material self-interest and the joy of their work, public school teachers must, in the long run, protect the public interest.” (pg. 51)

After reading the article, Visions of Justice consider the following:

How do the tensions of self-interest (industrial, and professionalism) and broader social justice concerns (social justice) make it difficult to move a community to constituency?

Across the history, as outlined in this article, when were the teachers most powerful? Least powerful? How did unity or the lack of it contribute to this?

How do you see these tensions in your own work with members?

This is a draft framework designed to help you think about your role as staff with your affiliate. This is in no way complete and is only designed to be used as a starting point for assessing your next steps with affiliates. Each level from Survival to Advanced is dependent on the previous level.

Levels (Staff Focus)	Membership	Structure Development	Identification and Protection of Rights	Agenda Setting	Visibility and Credibility
Advanced Organizing (Member-led with Staff Advisory and Coaching)	Leaders (elected and not elected) are driving membership recruitment and engagement. Coaching leaders who are committed to the contact and engagement work. One on ones are limited to those who are identified as emerging leaders by other leaders. Exploration of options to expand “belonging” beyond traditional dues paying members. Dues are seen as a positive and an investment in the members.	There are well-defined, member-led, leadership and communication structures in which there is competition for positions. Structures are formed around various issues, are led by members, and come and go. Participation in these structures are for members to collectively use their agency for change. Structures extend beyond the affiliate and work with other organizations around common values, issues and goal. Participation is expected by the rank and file and participation data is shared widely.	Members lead on all aspects of the identification and protection of worker rights. Staff expertise is reserved for legal services and consultation. Members are the visible and credible source for workplace rights attainment and protection. Identification and protection of rights expands beyond membership and affiliate. Local is able to wield power to demand ‘wins’ that are not within their contract but align with their interests outside of bargaining.	Leaders work with all levels of the organization (rank and file, issue structures, leaders, staff) to set agenda. Leaders work with other organizations on shared agendas in which resources, risks, and decisions are shared. Organizational data and issue research are used to drive and evaluate the agendas. Members are given lists and learn how to map their own buildings. There are multiple agendas that are focused both internally and externally.	The affiliate is recognized as long term partner with multiple organizations. It shares values, interests, risks, and resources beyond its own membership. Members view their union as the primary way that they participate in creating the society they want to live in. The reputation of the union is known broadly throughout the community as a good one or one that advocates for its’ community interests. Members have confidence enough to participate in risky, visible actions.

Levels (Staff Focus)	Membership	Structure Development	Identification and Protection of Rights	Agenda Setting	Visibility and Credibility Page 34
Basic Organizing (Member - Staff Partners w /Staff Growth -Coaching)	Staff and Leaders are building capacity to grow, maintain, and engage membership. Focus is on member recruitment AND retention. Engagement of members in actions that encourage ownership and build leadership. Staff and leaders are focused on Identifying potential leaders, ensuring worksite structures, and connecting leaders. One on ones focus on values based relationship and leadership ID. Dues are seen both as an investment in themselves and a transaction for support.	Staff are working to ensure building rep structures exist and local affiliate structures are functioning in ways that support and sustain the affiliate. Structures are coached to move closer and closer to ownership of collective decisions and actions. Coaching the structure to consider leadership pipeline. Participation in these structures is beginning to result in planning and action.	At the worksite level there are leaders and structures for addressing worker rights. There are affiliate level structures and leaders who work alongside staff to support worksites and are beginning to lead on district level issues. Members are part of the problem solving process. There are well established worker rights and processes that the union successfully enforces. Local is able to demand the basics that are guaranteed in their contract.	Staff and Leaders work to gather information about issues workers report from their worksites. Staff and Leaders determine short term and long term goals for both growth and strength. Focus is mostly on organizing to achieve worker wins and build internal capacity. Data is used to help support and evaluate agenda.	The affiliate is recognized as a credible and respected organization capable of achieving wins on issues important to members. The reputation of the affiliate is best known within the school district and its worksites. Members have a positive view of their union and are willing to participate in some public actions.
Beginning Organizing (Staff lead with a focus on growth and engagement)	Signing up members, maintaining lists, ensuring dues collection, providing information about the benefits of belonging. Staff mostly do this work and some locally elected leaders. One to ones are used to survey members. Some non-members are engaged. Staff are engaging members in very transactional or social actions and looking for people to fill existing leadership roles. Dues are seen as a transaction for services.	Ensuring basic structures required for affiliation with state and national are in good order. Focus on finding local leaders and on building a building rep system with at least one person per worksite. Leading effective meetings and modeling collective decision making and planning. Participation in structures is more about process than problem solving.	Reliance on union staff and staff relationships with employer. Members not engaged in problem solving beyond reporting issues to local leadership. Staff drive and lead bargaining, work place policy, and grievance processes. Rights and processes are somewhat known understood by the workers or some policies are worked out with the employer.	Staff help newly identified leaders understand how a union uses a values driven mission to achieve change. Staff develop a plan typically focused on membership growth and basic affiliate functions. Focus is on effective service delivery. Data is used to track members, non-members, and leaders.	The affiliate is somewhat recognized. Members and non-members are clear about membership status. The effectiveness of the union in regards to worker issues is limited. Only a group of activists participate in union activities outside of socializing. Rank and file participation is low and engagement of non-members does not happen.

Survival Organizing (Staff-led with a Focus on Growth)	Signing up members, maintaining lists, ensuring dues collection, providing information about the benefits of belonging. One on Ones focused on recruiting and education of union member value. Staff are engaging members in very transactional or social actions and looking for people to fill existing leadership roles.	Ensuring basic core leadership roles required for affiliation with state and national are filled. Focus on finding local leaders and some worksites have building reps. Participation in structures is focused on monthly meetings and socializing.	Reliance on union staff and staff relationships with employer. Member is not engaged in the problem solving process. Staff drive and lead bargaining, work place policy, and grievance processes. Rights and processes are not widely understood by the workers or clearly established with the employer. Focus is on ‘asking’ employer and ensuring good relationship with key employer personnel.	Staff help newly identified leaders or established leaders to develop basic agendas focused on process for basic affiliate functions. Staff develop a plan typically focused on membership growth and basic affiliate functions. Focus of staff is almost exclusively on service delivery. Data is on members is tracked and information on non-members is noted, but not followed up on.	The affiliate is not yet widely recognized. Page 35 Members and non-members may be equally confused about their membership status. The effectiveness of the union in regards to worker issues is not a part of the locals work or anticipated work. Members are not likely to participate in public actions beyond social activities. Member participation is low to non-existent and non-members are have no recognition or a negative recognition with the union.
--	---	---	---	--	---

Step 2. Planning for Movement through Levels of Organizing

What are the types of activities that you would need to put in place to move an organization from Survival Organizing to Advanced Organizing.

Keep in mind, this is a draft framework designed to help you think about your role as staff with your affiliate. This is in no way complete and is only designed to be used as a starting point for assessing your next steps with affiliates. Each level from Survival to Advanced is dependent on the previous level.

Levels (Staff Focus)	Membership	Structure Development	Identification and Protection of Rights	Agenda Setting	Visibility and Credibility
Advanced Organizing (Member-led with Staff Advisory and Coaching)					

Levels (Staff Focus)	Membership	Structure Development	Identification and Protection of Rights	Agenda Setting	Visibility and Credibility
Basic Organizing (Member - Staff Partners w /Staff Growth - Coaching)					
Beginning Organizing (Staff lead with a focus on growth and engagement)					

Survival Organizing (Staff-led with a Focus on Growth)					
---	--	--	--	--	--

Examples of Reasons to Join – What are the expectations that are set?

THE VALUE OF MEMBERSHIP

https://join.nea.org/louisiana/?_ga=2.88326299.1863554204.1669648611-847814035.1669648611

Salary and Benefits

Simply put, educators deserve professional pay for professional work — and the members of LAE are the premiere advocates fighting to ensure you're paid what you're worth. This also means stopping legislative cuts to your benefits such as health insurance and retirement.

Respect

From the local school board to the state legislature, elected officials are making decisions that impact your schools — join our union and be a part of the discussion. LAE members form the strongest voice advocating for educators and students across Louisiana. We're fighting against the standardized test regime, raising the need for fair evaluations, and standing in solidarity to secure fair wages for every worker in our schools.

Networking

Being an educator can be stressful — but you're not alone. LAE members have a support system of thousands of educators and LAE staff who live and work in your district. Whether you're a new teacher who needs advice on a difficult classroom or a food service worker that's pushing back against student lunch debt — our union members are here to provide support, experience, and their voices to your needs.

Professional Development

LAE is one of the largest providers of high-quality professional development trainings in the state. Take part in continuing education in everything from classroom management to teacher evaluations.

Leadership Training

Do you have big dreams to help your students and school? LAE has access to robust leadership training courses that will give you the skills to be an effective leader in your school, community, and state.

Legal Protection

Members get access to the best team of education law experts in the state. Having our liability insurance makes sure that LAE has you covered.

Member Discounts

Members can take advantage of deep discounts on vacations, movie tickets, life insurance, cars and more.

Why Union? Why NYSUT?

<https://www.nysut.org/resources/special-resources-sites/our-union/why-union#:~:text=The%20union%20offers%20contract%20protection,%2C%20retirement%20security%20%2D%20and%20more.>

Learn more about the value of union membership.

- [For Your Benefit](#)

The union offers contract protection, higher earnings, access to affordable health care, retirement security - and more.

- [For Your Profession](#)

NYSUT gives you a voice with lawmakers and policymakers to improve your workplace and profession.

- [For Your Future](#)

NYSUT offers programs and resources for professional growth, support for cutting through the bureaucracy, and specialized training.

- [For Your Rights](#)

The union is your partner in advocacy and legal representation.

- [For a Better World](#)

As a union member, you are part of a community dedicated to each other and to making the world a better place.

The Red for Ed Movement, Two Years In

<https://newlaborforum.cuny.edu/2020/10/03/the-red-for-ed-movement-two-years-in/>



October 2020 Administrator

Photo caption: Teachers' strike in Phoenix, Arizona on April 26, 2018. Photo credit: Eric Blanc

By Eric Blanc

In late February 2018, teachers and support staff shuttered schools in all fifty-five counties of West Virginia. Their strike inspired educators across the country and raised hopes that a long-awaited revival of

organized labor may have finally arrived. That spring, school employees in Oklahoma, Arizona, and beyond walked out to demand increased education funding and better pay. Confounding all expectations, these actions erupted in Republican-dominated (Red) states with weak labor unions, bans on public sector strikes, and electorates who voted for Donald Trump. The Red for Ed movement soon spread nationwide, with strikes throughout 2019 paralyzing school districts in Democratic cities such as Los Angeles, Oakland, Chicago, and Denver. How has this Red for Ed movement developed over the two years since those events in West Virginia? Have the walkouts strengthened educator unions and rank-and-file teacher activism? And to what extent has the movement been able to win its demands and effect broader political changes?

The Movement Continues

Although educator militancy predates 2018, one of the novel impacts of the strikes in West Virginia was that it immediately set off a wave of similar workplace actions, particularly in Republican-led “right-to-work” states. Despite bans on public sector strikes and relatively weak labor movements, the spring of 2018 witnessed statewide teacher strikes in Oklahoma and Arizona, as well as one-day walkouts in Kentucky, North Carolina, and Colorado. All in all, more than 375,000 education workers engaged in work stoppages in 2018, bringing the total number of strikers that year to 485,000—the largest number since 1986.[1]

After the spring 2018 upsurge, it remained an open question whether Red for Ed was an ephemeral explosion or the beginning of a sustained nationwide movement. Strike statistics would seem to indicate the latter. A total of 425,000 workers struck in 2019, with a strong majority (270,000) again coming from the education sector. And this number does not include the numerous examples of school districts such as Las Vegas, where unions organized credible strike threats but management avoided walkouts by granting major last-minute concessions.

After the spring 2018 upsurge, it remained an open question whether Red for Ed was an ephemeral explosion or the beginning of a sustained nationwide movement.

The fact that the strike upsurge remains largely limited to education, however, is a significant limitation. Educators can only go so far in the absence of a broader revitalization of organized labor. Large numbers of workers across the country may be ready to fight—but faced with powerful corporations and a much weaker union movement in the private sector, turning that potential into a reality remains easier said than done.

Of the 2019 work stoppages, the most important were certainly January’s strike in Los Angeles and October’s strike in Chicago. Each were offensive actions to reverse the education policies imposed by corporate Democrats over the past two decades; each foregrounded “common good” demands on behalf of students as well as the broader community. These common good demands, for example, included an increase in the number of nurses and counselors as well as smaller class sizes. Importantly, each of these strikes highlighted the interconnection between the fight for public education and racial justice. What set Los Angeles apart from other

work stoppages in recent memory were the depth and systematic nature of the organizing drive that made it possible. Upon winning the leadership of United Teachers Los Angeles (UTLA) in 2014, the newly elected leadership from the Union Power caucus proceeded to reorient UTLA toward a years-long process of deep organizing. An increase in membership dues and internal staffing served as the scaffolding for training hundreds of rank-and-file leaders, tasked with organizing their school sites and reaching out to parents. Any activist or union interested in systematizing effective organizing methods would do well to study the UTLA strike.

In Chicago . . . , a particularly significant development was that the October 2019 work stoppage was not only of teachers but also of school service personnel.

In Chicago (whose 2012 teachers' strike was the most important precursor to, and inspiration for, Red for Ed), a particularly significant development was that the October 2019 work stoppage was not only of teachers but also of school service personnel. Thousands of special education classroom assistants, custodians, bus aides, and security guards organized via SEIU Local 73 walked picket lines to fight for living wages and better working conditions. As in West Virginia, the result was a significantly stronger strike, one that made clear to the public that it takes more than teachers to run a school.

As seen in the Los Angeles and Chicago strikes, Red for Ed's center of gravity in 2019 shifted to "blue" cities and states. In Oakland, a February strike had a similar social justice orientation to Chicago and Los Angeles, though with only six months to prepare its campaign, the union's contract wins fell somewhat short of gains won elsewhere. And the strike wave finally reached the East Coast in October, when educators in Dedham, Massachusetts walked out in an illegal action that consciously challenged the state's ban on public sector strikes. Though it took place in a small district, Dedham's victory was politically significant because it again showed that anti-strike laws—which remain on the books in most parts of the country—can be surmounted through collective action.

Republican-led states also witnessed important work stoppages in 2019. In February, West Virginia educators organized another victorious statewide strike, which succeeded in stopping the introduction of charter schools. Nashville, Tennessee educators organized wildcat sickouts in May against budget cuts. On November 14, educators in Little Rock, Arkansas organized a one-day strike to stop racial resegregation and to demand Democratic local control of their school district. And Indiana teachers followed suit on November 19, in a statewide walkout to demand more funding, better pay, and an end to over-testing. Whereas most of these work stoppages raised social justice issues and were led either by militant union leaders or by unruly rank-and-filers, one of the less reported developments of 2019 has been the spread of strikes narrowly focused on wages and led by relatively moderate union officials. Examples of such actions include the February strike in Denver, the May-June strike in California's New Haven school district, and the November walkout in West Sonoma, California, as well as numerous walkouts in smaller school districts across the country. Although the results of these work stoppages were mixed, it is a sign of the times that even some old-school union leaderships have felt the pressure to take action.

Organizational Growth

Have the educator strikes since 2018 resulted in a quantitative and qualitative revitalization of organized labor? One important criterion for assessing this question is growth in union membership. From February 2018 through February 2019—that is, in the year following West Virginia's walkout—the American Federation of Teachers (AFT) grew by one hundred thousand members. And despite the passage of the anti-union *Janus* Supreme Court decision in the summer of 2018, the National Education Association (NEA) similarly saw an uptick in membership. To quote *EdWeek* journalist, Madeline Will, "the groundswell of teacher activism across the country over the past year might have attracted more members."^[2]

. . . [I]n the year following West Virginia's walkout—the American Federation of Teachers (AFT) grew by one hundred thousand members.

Data from the specific unions that coordinated statewide strikes confirm a hypothetical link between strike militancy and union revitalization, though with an important caveat. The available evidence suggests that union

membership grew in the wake of *successful* union-led strikes—ineffectual strikes, in contrast, led to a decrease in dues-payers.[3]

Arizona and West Virginia were the two states in the spring of 2018 where unions helped lead what educators generally felt to be victorious strikes.[4] In West Virginia, the push for a work stoppage forced the state to withdraw its controversial rate hikes to the public employee health insurance plan. Then, after almost two weeks of shuttered schools in late February and early March, West Virginia’s legislature caved to the strikers and granted a 5 percent raise to all public employees, not only educators.

In Arizona, the April-May strike forced the legislature to grant teachers an average 20 percent pay raise—a remarkable outcome given that legislators had until this point refused to consider anything more than a 1 percent raise. The work stoppage also successfully pressured the legislature to rescind its new proposed tax cuts and its efforts to take an anti-privatization referendum off the November 2018 ballot.

In contrast, Oklahoma’s April walkout wrested no gains from the state government. A 15 percent pay increase had been approved by the legislature on the eve of the strike, but the walkout itself, unlike in Arizona and West Virginia, was unable to force any more concessions. Perhaps most damaging, the Oklahoma Education Association (OEA) controversially called off the walkout before most teachers were ready to return to work, resulting in widespread denunciations of the union from rank-and-file educators.

Following the actions in West Virginia and Arizona, union membership grew by the thousands. The affiliate of the NEA in Arizona experienced a 10.3 percent increase in members. [5] And in West Virginia, the NEA affiliate grew by 3.8 percent and the American Federation of Teachers grew by 4.6 percent.[6]

... [W]hile there is no automatic link between strikes and increased union membership, successful strikes do tend to quantitatively strengthen organized labor.

Oklahoma presented a different picture. Given the disappointing outcome of the strike and the union’s controversial role, one should not be surprised that the OEA’s membership dropped by 1.7 percent.[7] In short, the spring 2018 upsurge suggests that while there is no automatic link between strikes and increased union membership, successful strikes do tend to quantitatively strengthen organized labor. As one Arizonan teacher argued on a Facebook thread concerning the lessons of the strike, The word “union” does not scare me anymore. I joined [the Arizona Education Association] and plan on continuing to fight for what is right for educators and students. I feel the most empowered I have ever felt as an educator and now do believe that change is possible.

Membership increases tell only part of the labor revitalization story, for there were many members who did not become active participants in the union until these work stoppages. Tanya Asleson’s experience in Ravenswood, West Virginia was illustrative:

I went from not wanting to be a building rep, to being aggravated and involved, to now becoming president of the AFT in our county. The strike forced me to find leadership skills within myself. We’ve all really grown in the last couple of months; it makes us proud.

Another significant organizational development since 2018 has been the growth and increased influence of rank-and-file reform efforts across the country, which promise to sustain the educator upsurge over the years to come. Although teachers’ unions have generally become more assertive since 2018, this has not overcome tensions between risk-averse officials and more combative activists oriented to workplace militancy and social justice issues. Indeed, the post–West Virginia upsurge has led to the growth and spread of reform caucuses hoping to replicate the democratic organizing methods, anti-racist focus, and strike-oriented strategies promoted by reform union leaderships in Chicago, Los Angeles, and beyond.

Many of these reform groups have coalesced around the United Caucuses of Rank-and-File Educators (UCORE), including the new West Virginia United Caucus led by many of the organizers who helped initiate the 2018 strike. And these forces experienced some notable successes this past year, with the election of rank-

and-file reformers to union leadership in Baltimore, Denver, and Nashville. Yet as seen in the January 2020 defeat of a well-organized electoral challenge waged by the Caucus of Working Educators in Philadelphia, incumbent leaderships generally remain in the driver's seat.

Shaping the Political Narrative

Red for Ed has also brought about important changes in the political arena. Perhaps the movement's most important win has been to change public perceptions of the crisis facing education. Only a few years ago, the mainstream media as well as leading Democrats and Republicans routinely scapegoated educators and championed a billionaire-backed "education reform" agenda, focused on privatization, high-stakes testing, and union busting.

The strike upsurge has succeeded in pushing the national and statewide political conversation in a new direction. Low wages for teachers and the systematic underfunding of schools are now the most commonly cited explanations for public education's travails. To cite one example, Time magazine went from publishing laudatory cover stories about privatization advocates like Michelle Rhee to running a September 2018 cover story titled "I Have a Master's Degree, 16 Years of Experience, Work Two Extra Jobs, and Donate Blood Plasma to Pay the Bills. I am a Teacher in America."

Low wages for teachers and the systematic underfunding of schools are now the most commonly cited explanations for public education's travails.

Polls show that a strong majority of the population support the education strikes, believe that teacher salaries are too low, and would support teachers locally if they decided to strike.[8] Scholars have also documented how the walkouts have directly impacted public opinion in effected regions. An original survey conducted by Columbia University sociologists in the six states that experienced walkouts in 2018 found that "the strikes had large, direct, and positive effects on mass attitudes, even nearly a year after the strikes originally occurred." Noting that the impact upon parents was particularly pronounced for "conservatives, Republicans, and those without personal experience with unions," the study concludes that

[n]ot only did the teacher strikes appear to succeed in establishing a greater sense of common fate between parents and the teachers, but the strikes also increased individuals' own interest in labor action (though not necessarily through traditional unions), suggesting a potential multiplier effect that could inspire greater labor mobilization, especially strikes.[9]

Policy Changes

In terms of policy concessions and changes at work, the gains have been more uneven. As noted earlier, some of the strikes failed to win any concessions. This was less common in 2018, when state legislators were generally caught off guard by the strikes; by 2019, however, they were clearly better prepared. In June 2019, the West Virginia legislature took advantage of the end of the school year to ram through the same charter school legislation that striking educators had defeated just a few months earlier. Arizona's movement still has not recovered from the blow delivered by the right-wing state Supreme Court's decision to unilaterally remove a progressive funding initiative from the ballot. And in New Haven, California, educators returned to school after fourteen days of striking without wresting any major concessions from the district.

That said, lost strikes since 2018 have won significant pay raises for educators and, as such, have been experienced as at least partial victories. These wage gains have eased material survival for thousands of teachers and simultaneously served to confirm that teachers deserve respect in the community and dignity at work. Gains beyond pay raises have been more limited. While the Los Angeles and Chicago strikes were able to win some "common good" demands, these broader victories were the exception rather than the rule. Nor have any of the strikes reversed systematic school underfunding, particularly in communities of color, or the draconian test-driven "accountability" measures that remain the norm across the country.

If anything, the rapidly raised expectations generated by strike participation have put into sharper relief the distance between educator aspirations and day-to-day working conditions. Although this gap fuels ongoing mobilization campaigns, it has also led to considerable individual demoralization and collective frustration beyond educator-activist milieus. There is also only so much that one walkout can do to turn around decades of public school neglect, particularly when limited to a single district. Even the most powerful of the strikes since 2018 were not able to win all their demands. The mixed results we have seen suggest that strikes, while likely necessary for the revival of labor and the transformation of public education, are not sufficient on their own to wrest the structural reforms proposed by educators and their unions. Without political solutions like ballot initiatives to tax the rich and electing firmly pro-education representatives to office, it is hard to imagine how Red for Ed will be able to ultimately reach its ambitious goals.

For a glimpse at how the energy of workplace action can potentially feed into changes in political office, consider the case of Kentucky, where a teacher-led political insurgency took down Republican governor Matt Bevin. In response to the governor's push for austerity, Kentucky educators walked out by the tens of thousands in the spring of 2018 to save their pensions and fund public education. Over the following eighteen months, they formed the backbone of the "Won't Be Bullied by Bevin" election crusade that was buoyed by \$1.2 million in teacher union donations. Faced with this grassroots upsurge, even Donald Trump's last-minute campaign rally was not enough to save Bevin, who lost in November 2019 by five thousand votes to Andy Beshear, a mainstream Democrat who nevertheless ran on a strong pro-public education platform. On election night, Beshear acknowledged the decisive role of unionized school workers: "To our educators, your courage to stand up and fight up against all the bullying and name calling helped galvanize our entire state." [10]

When asked about how to refund public education, Chicago Teachers Union Vice President Stacy Davis Gates put it well: "Where will the money come from? Rich people."

It remains to be seen whether the Red for Ed movement can find the means in other states and on a national level to bring about a major reprioritization of public education. With wind in their sails, unions are increasingly pointing their fingers at the billionaires and corporations who many hold responsible for undermining the school system. When asked about how to refund public education, Chicago Teachers Union Vice President Stacy Davis Gates put it well: "Where will the money come from? Rich people."

One important test is looming in California, where a group of unions has spearheaded a statewide coalition to pass a progressive taxation initiative in the November 2020 elections that would raise \$13 billion for schools and public services by reforming Proposition 13, a landmark anti-tax initiative passed in 1978. On a national level, teachers were the number one funders of the Bernie Sanders campaign. In large measure, this stemmed from Sanders' active support for the school strikes and his adoption of their core demands. Some of the unions that led work stoppages in 2019—including UTLA and the Oakland Education Association—also endorsed Sanders, breaking with the labor movement's long-standing attachment to the Democratic Party establishment. Most other progressive educator unions, however, remained paralyzed by divisions between supporters of Sanders and Elizabeth Warren. Eventually, both the NEA and AFT national leaderships endorsed Joe Biden.

Although Biden presided over years of austerity, privatization, and high-stakes testing as part of the Obama administration, it is a testament to the strength of Red for Ed and the changing political tides that Biden's campaign has, at least rhetorically, significantly distanced itself from those anti-educator policies. Whether Biden will stick to his campaign promises if elected will very likely depend on the extent to which the movement can pressure him through strikes, protests, and community organizing.

Looking Ahead

What comes next? The already challenging task of predicting future political developments has been made much more difficult by the unexpected eruption of the coronavirus crisis, which has quickly upended schools as well as protest activities. In March, a strike in St. Paul, Minnesota was cut short for health and safety reasons. In New York City, rank-and-file educators led by the Movement of Rank-and-File Educators caucus forced the mayor to close public schools, a step soon after followed by districts across the country.

At this moment, it remains unclear when schools will reopen and under what conditions. One thing, however, is certain: a virus-induced funding crunch for local and state governments could lead to an even more severe reprise of the bipartisan austerity, privatization, and unionbusting that prevailed after the 2008 recession. But there is at least one big difference from the last economic crisis—a robust educators’ movement now exists and is ready to resist any such attacks. As such, the future of America’s public schools will remain tied to the Red for Ed movement for the foreseeable future.

Notes

1. Bureau of Labor Statistics, “Major Work Stoppages in 2018,” February 8, 2019, https://www.bls.gov/news.release/archives/wkstp_02082019.pdf.
 2. Madeline Will, “Nation’s Largest Teachers’ Union Sees Slight Upswing in Membership,” June 14, 2019, http://blogs.edweek.org/teachers/teaching_now/2019/06/nations_largest_teachers_union_upswing_membership.html.
 3. Unfortunately, the absence of membership data from district-wide unions precludes incorporating their experience into our analysis. As such, we rely on membership numbers for statewide unions.
 4. Eric Blanc, *Red State Revolt: The Teachers’ Strike Wave and Working-Class Politics* (New York: Verso, 2019).
 5. Mike Antonucci, “Mixed Results from New NEA Membership Numbers Pre-Janus Ruling, Post 2018 Teacher Walkouts in W. Va., Okla. and Ariz.,” June 19, 2019, <https://www.the74million.org/article/mixed-results-from-new-nea-membership-numbers-pre-janus-ruling-post-2018-teacher-walkouts-in-w-v-a-okla-and-ariz/>.
 6. Antonucci, “Mixed Results From New NEA Membership Numbers,” Mike Antonucci, “In the Byzantine World of American Federation of Teachers Membership, Numbers Just Don’t Add Up,” September 3, 2019, <https://www.the-74million.org/article/union-report-in-the-byzantine-world-of-american-federation-of-teachers-membership-numbers-just-dont-add-up/>, Mike Antonucci, “Teachers Unions See Modest Membership Losses in 2018-19 School Year—Janus Decision Having Little Effect, So Far,” October 16, 2019, <https://www.the74million.org/article/union-report-teachers-unions-seemodest-membership-losses-in-2018-19-schoolyear-janus-decision-having-little-effect-so-far/>. Since American Federation of Teachers (AFT) locals are disproportionately clustered in large cities on the coasts and the Midwest, West Virginia was the only state during the spring 2018 upsurge in which there existed a significant AFT affiliate.
 7. Antonucci, “Mixed Results From New NEA Membership Numbers.”
 8. John Bowden, “Two-thirds Support Teacher Strikes in New Poll,” September 12, 2018, <https://thehill.com/blogs/blog-briefing-room/news/406373-poll-majority-support-teacherstrikes>, Tim Walker, “Poll: Public Support for Teacher Strikes, Higher Pay Runs Wide and Deep,” August 27, 2018, <http://neatoday.org/2018/08/27/pdk-poll-2018/>.
 9. Hertel-Fernandez, Alexander, Suresh Naidu, and Adam Reich, “Do Teacher Strikes Make Parents Pro- or Anti-Labor? The Effects of Labor Unrest on Mass Attitudes,” October 29, 2019, <https://equitablegrowth.org/working-papers/doteacher-strikes-make-parents-pro-or-anti-labor-the-effects-of-labor-unrest-on-mass-attitudes/>.
 10. “Democrat Andy Beshear Declares Victory in Tight Kentucky Governor’s Race,” November 6, 2019, <https://www.cbsnews.com/news/kentucky-election-results-today-andy-besheargovernor-race-2019-11-05-live-updates/>.
-

Author Biography

Eric Blanc is a doctoral student in sociology at New York University and the author of *Red State Revolt: The Teachers’ Strike Wave and Working-Class Politics* (Verso 2019).

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.
Advocacy	None, or done by staff and/or local president Used as one of the few justifications to pay dues	Few members may help with advocacy with much support from staff. Advocacy is solely viewed as a service to single members.	Intentional identification and training of member advocates who conduct low-level meetings with support of higher levels from staff. Most advocacy is still viewed as a service to individuals with some understanding that protecting the work standards are in everyone's interest.	Advocacy is primarily viewed as way to build worker solidarity and ways to exercise collective action in response to poor work standards. Issues to organize around.
Activity	None, or led by the union, the staff, or by union members. No ownership.	Programs for individual interest with little risk in participating. Led by one person, and focus of change is on personal practice.	Works to have leaders design and lead the programs. Focus is on change of relationship with the union from rank and file to leader. Mobilizing and activism are the norms focused on traditional worker issues.	Organizing is the norm focused on the solidarity of the group and the work is to apply pressure on a system of oppression. Issues are broad and include social movement thinking.



Case Studies

Peer Assistance and Review
It's Not Magic It's Organizing
Organizing a Caucus Step by Step
New Teachers Energize Their Union



NATIONAL
EDUCATION
ASSOCIATION

Assessing Resources

For any campaign to be effective, the leadership team needs to assess the constituents' resources and capabilities. What resources are currently available to the group? What resources is the group lacking? What resources does the boss have? What is the boss lacking? In this assessment, be certain to consider all types of resources – those that deplete as you use them and those that grow. Resources that deplete: facilities, money, materials, time, volunteers. Resources that grow: skills, trust, hope, relationship, allies, reputation, volunteers.

Our Resources	The Boss' Resources

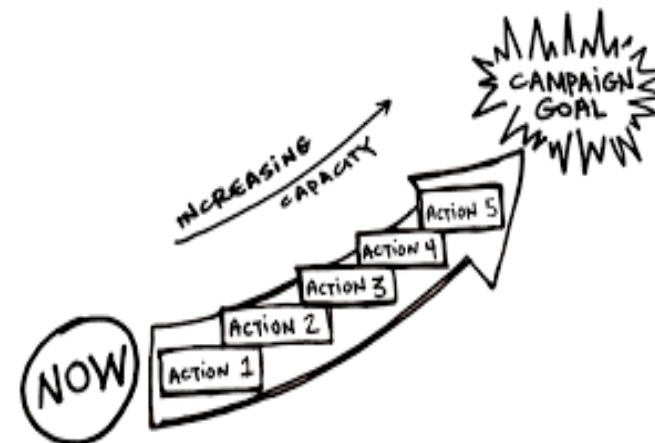
Grow as you use them.

Deplete as you use them.

Key Point – the bigger the win you are trying to achieve, the more resource you need.

Clubs to Fighting Unions Case Analysis

We are going to use 4 Cases from the book, Teacher Unions and Social Justice. You are going to be analyzing them in terms of what they describe as their wins, how they achieved those, and the leaders that were involved.



Case	Who is the boss? What are the key issues that they have? What are their wins?	What are the resources that they used to win?	What are the small steps along the way (tactics or structure tests) that were put in place?	Who are the key leaders and how do you know?
It's Not Magic It's Organizing				

Case	Who is the boss? What are the key issues that they have? What are their wins?	What are the resources that they had to win?	What are the small steps along the way (tactics or structure tests) that were put in place?	Who are the key leaders and how do you know?
Peer Assistance and Review				
Organizing a Caucus in Philadelphia, Step by Step				

Case	Who is the boss? What are the key issues that they have? What are their wins?	What are the resources that they had to win?	What are the small steps along the way (tactics or structure tests) that were put in place?	Who are the key leaders and how do you know?
New Teachers Energize Their Union				

“It’s Not Magic. It’s Organizing!”

The powerful journey of North Carolina teachers

BY ELENI SCHIRMER

In March 2013, just months after Republicans gained a supermajority in the North Carolina legislature and won the governor’s office, state NAACP president Rev. William Barber II stood before educators at the annual convention of the North Carolina Association of Educators (NCAE) and delivered an electrifying keynote speech.

Barber, a civil rights leader who led the state’s “Moral Monday” movement and, later, the national Poor People’s Campaign, called on teachers to confront the conservative agenda taking apart their states through direct actions, protests, and organizing. If educators saw public education as a cornerstone of democracy, they would need to stand up and fight for it. His exhortations struck a new tone in the NCAE, an organization better known for lobbying elected officials than leading mass movements against them.

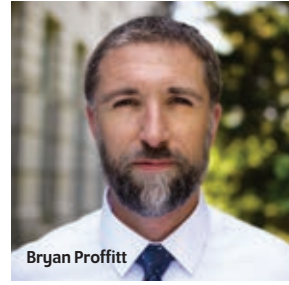
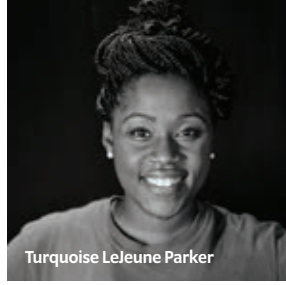
“He lit the room on fire,” remembered Durham high school teacher Bryan Proffitt. Inspired but new to the NCAE scene, Proffitt texted a veteran NCAE friend: “Bring everyone you know who wants to do *that* to the back of the room.”

The assembled teachers quickly realized they wanted—indeed, needed—to get to work. Three weeks later, they met to talk more. Shortly thereafter, they put together a workshop about organizing skills for their colleagues—how to have one-on-one conversations, map workplaces to gauge membership, assess power structures. They began study groups about the neo-liberalization of education, structural racism in education, and the role of teacher unions.

In April 2020, that scrappy group of teachers from the back of the state convention won the NCAE’s statewide leadership elections.

These teachers’ successful organizing marks an important landmark in today’s teacher union movement. Although often overlooked in popular accounts of teachers’ recent “red state revolts,” North Carolina’s progressive caucus, Organize 2020 for Racial and Social Justice, offers crucial lessons for building social justice teacher unions. Their name defined their goals and their method: to organize a fighting union that prioritized racial and social justice by 2020.

In April 2020, that scrappy group of teachers from the back of the state convention won the NCAE’s statewide leadership elections.



Caucus members Tamika Walker Kelly and Bryan Proffitt will serve as the NCAE's president and vice president, respectively; Turquoise LeJeune Parker will become North Carolina's National Education Association director. To date, they are one of the few progressive teacher union caucuses to win state-level leadership elections. In one sense, Organize 2020 has achieved its namesake: to organize a progressive, racial justice-focused teacher union by 2020. But perhaps more accurately, their success reflects the work of years of careful organizing, a patient buildup of strength, and a movement still hitting its stride.

In the past decade, North Carolina has become the extreme right's frontier. In 2010, Republicans won the state's General Assembly, as the legislature is formally known, for the first time since Reconstruction. In 2012, they took the governor's mansion and achieved a three-fifths majority in both houses of the legislature. With Tea Party and Koch brothers backing, the Republican supermajority pushed through a series of American Legislative Exchange Council (ALEC)-sponsored legislation. ALEC is a right-wing corporate-backed association that drafts and advances conservative legislation. In North Carolina, ALEC legislation starved the public sector, cut social spending to the bone, and deregulated corporations and private entities. The General Assembly slashed the earned income tax credit for working families, cut Medicaid coverage, and ended federal unemployment benefits for 170,000 in a state with one the nation's highest unemployment rates.

Meanwhile, legislators rolled back corporate taxes, estate taxes, and personal income taxes to the lowest in the country. The ensuing budget shortfalls devastated public schools. Per-pupil spending plummeted. Schools lacked basic supplies. Those who stayed saw their wages decline 9.4 percent since 2009, dropping to among the lowest teacher salaries in the country. At the same time, North Carolina legislators reallocated funds to private and charter schools. In 2011, Republican legislators removed a cap on charter schools. In 2013, they created private school vouchers, drawing even more money from public school budgets. North Carolina's Republicans were turning the lights out on public education.

Building a Base, Step by Step

While public education's enemies assembled new power and strategies, the teacher union seemed frozen in place. Throughout much of the preceding decades, North Carolina had been governed by moderate Democrats, such as Jim Hunt and Mike Easley. Thanks to a strong alliance with the NCAE, these "education governors"

passed reforms that made North Carolina's public education system shine across the South, from class size reductions to teacher salary increases to prized principal training institutes. It was a stable compact: the NCAE secured teachers' bread-and-butter protections in exchange for teachers' votes and political contributions. But by the 2010s, as the right gained power, Tea Party and Koch brother-backed Republicans seized the legislature and governorship, and the NCAE's lobbying strategy crumbled—along with its influence.

Across the state, teachers increasingly saw the union as an irrelevant, even impotent, force of change. Membership dropped precipitously. But when the Chicago Teachers Union won a historic strike in 2012 against one of the country's most powerful Democrats with unprecedented levels of community support, educators around the country began to reimagine possibilities for their own unions. The Chicago strike helped many, including Proffitt, realize a “union isn't like a mythical creature. It's just a set of humans.” A union could change. But how?

Weeks after the NCAE's 2013 convention, Rev. Barber began North Carolina's Moral Monday movement. Thousands gathered each week in Raleigh to demand voting rights, immigrant rights, racial justice, tax reform, and public funding for public schools. Although NCAE leadership did not participate, Proffitt and fellow educators Raquel Robinson, Jessica Benton, and Kristin Beller jumped in. They spent the summer of 2013 walking through the crowds holding up a clipboard that read “Public School Worker?” By the end of summer, they had connected with hundreds of fired-up teachers. When they ran an all-day organizing training the Saturday before school started in the fall, more than 75 people showed up. “It was really wild to do an organizing thing the Saturday before school started,” explained Durham teacher and Organize 2020 leader Turquoise LeJeune Parker. “Like really wild. And I liked that.” Casting aside the notion of teachers as docile rule-followers, these educators got to work. After all, the rules were dismantling their schools.

“A union isn't like a mythical creature. It's just a set of humans.”

In 2013, the North Carolina legislature made additional funding cuts to public education, raised class size limits, and for the fifth year in a row denied a salary increase for teachers. This group of educators decided to organize actions to draw attention to their students' pressing needs and their poor teaching conditions. That fall, educators in 90 schools across the state led a “walk-in” campaign, in which rank-and-file teachers invited families and community members to gather before the bell and then simultaneously walk into schools en masse. The following year, the Alliance to Reclaim Our Schools lifted up the tactic, and began a series of nationwide “walk-ins” by teachers and parents that galvanized labor and community coalitions across the country. The teachers weren't walking *out* on students—they were walking *in* for them.

Meanwhile, the General Assembly was doing everything possible to divide and conquer teachers. That summer, it proposed a measure offering 25 percent of teachers \$500 if they surrendered their due process and appeals rights; everyone else

would face short-term contracts and lose their career status. The NCAE immediately brought a lawsuit challenging the bill. But Proffitt and his fellow educators had a different strategy. The union's lawsuit might win, but it would do little to engage anybody, nor would it build teachers' power. Quickly, they developed a "Decline to Sign" campaign. They gathered signatures of teachers who would not accept the new contract terms, and then helped others develop local campaigns to pressure their school boards to oppose the bill. Within a few months nearly half all of the school boards in the state passed resolutions opposing the law. When the law was finally rejected, teachers got to understand it as their victory, too—not just something that lawyers or lobbyists had won *for* them. This success encouraged the educators who participated in this campaign to officially become a caucus: Organize 2020.

In 2014, a leadership change in the NCAE altered Organize 2020's relationship with the state union. The NCAE's new executive director was decidedly less friendly toward Organize 2020 and thwarted many of their efforts to utilize the union's official channels. Rather than fighting against obstinate would-be allies, the group decided to prioritize internal political education. The caucus, which at this point in time was predominantly white, organized a series of workshops around race and racism. "One of the things we say in Organize 2020," Walker Kelly explained, "is that we believe the job of the union is to defend and to transform education. If we're really going to do that, we have to talk about the institutional barriers racism creates." Prior to Organize 2020, issues of race and racism had seldom been addressed within the union. "We spent a lot of time talking about bread-and-butter issues like pay and working conditions and things like that, but we didn't really spend a lot of time talking about what does it really mean when we say want every child to have a high-quality public education?" said Walker Kelly. Approximately 51 percent of North Carolina's public school students are students of color; less than 20 percent of the teaching workforce is people of color. Organize 2020's trainings drew in many leaders of color, establishing Organize 2020 as a multiracial caucus.

These trainings empowered educators to understand the structural dimensions of racism and educational inequality. They also aimed to build educators' organizing skills, and leadership development especially, to address these problems. Leadership, Organize 2020 believed, like organizing, was a skill; it could be learned and taught. The caucus was deeply reverent of Ella Baker's organizing philosophy and legacy, especially her emphasis on building relationships and the bottom-up development of power. The caucus especially heeds the leadership definition of scholar Marshall Ganz, whose scholarship offers academic codification of much of Baker's work. Leadership, Ganz defines, is "accepting responsibility for creating the conditions that enable others to achieve shared purpose in the face of uncertainty." (Proffitt quipped that Organize 2020 leaders hold that definition so dear, all will eventually tattoo some portion of it on their bodies.) As LeJeune Parker explained, "So much of the work of teaching is about teaching young people about the world that we live in and we want to live in and helping them understand how they fit in there and how necessary their voices are. You have a huge role to play in this, and I

need you.” For Organize 2020 teachers, developing a sense of personal and collective agency was critical to their work as educators and unionists.

Durham Association of Education Takes the Lead

But Organize 2020 wasn’t content with political education alone; they wanted to win power to advance their vision. They decided on a strategy of building up locals; the union was, after all, “an assemblage of locals.” In 2015, Proffitt began organizing and successfully ran for president of the Durham Association of Educators (DAE). He quickly built up relationships with teachers and administration at every school, making hand and face contact with as many educators as possible. Mass meetings, which previously had eight or nine in attendance, became boisterous events of 50 or 60 people, in which key decisions and campaigns were plotted out. “People don’t hate meetings,” Proffitt explained, “they hate *bad* meetings.” DAE meetings bustled with clear structures, agendas, goals, celebrations, opportunities for discussion, organizing work plans. Rather than time to aimlessly grumble and complain, DAE meetings became key spaces for advancing the union’s campaigns. Walk into a DAE meeting and call out, “It’s not magic” and the whole room will respond, “It’s ORGANIZING!”

The local also developed a sophisticated system of building organizers and district organizers to keep tight communication between school-based organizing and union leadership. Campaign actions all became “structure tests” to gauge the strength of the organization, checkups to assess the depth and breadth of workers’ participation. (See McAleve, p. 423.) These actions gave information about the strength of organizing at each school—where participation was high or low, leadership strongholds and gaps. This informed where they needed to build strength in the next round of organizing.

Running constant campaigns not only built the union’s internal organizing strength, it also developed their external power. Between 2015 and 2018, DAE won a series of bold campaigns to protect and defend their students, communities, and fellow workers, who were under increasing attack from conservative legislators. In 2015, they won a wage raise for classified staff, the first time in years. In 2016, when a high school student was kidnapped on his way to school by Immigration and Customs Enforcement, DAE took the lead in advocating for the student’s return. This campaign not only successfully brought the student home, it also shifted how the union related to questions of immigration reform, putting it at the center of the union’s purview. After all, teachers’ primary responsibility is to protect students.

The next year, when the Republican governor threatened more school budget cuts, Proffitt, LeJeune Parker, and fellow Organize 2020 members marched from Durham to Raleigh, demanding a meeting with Gov. Pat McCrory about the cuts. When the governor did not show up to the meeting, despite the fact that this group of teachers walked 20-plus miles in two days to meet with him, they refused to leave. Fourteen teachers were arrested. Their action not only brought attention to schools’ budget crisis, it also weakened McCrory’s credibility. That fall, he was voted out of office. Organize 2020 successfully backed candidates for Durham school

board, installing one of the most progressive school boards in the South. In 2017, when a controversial school takeover bill targeted a Durham public school to be converted to a charter, teachers organized a campaign to keep it open. A year later, they had not only defeated the bill, they had also built the school into a flourishing community school.

In 2018, when West Virginia teachers led a historic statewide strike, North Carolina teachers wondered if they could do something similar. But a successful statewide strike requires more than an email blast from a few teachers. Organize 2020 teachers knew they would need incredible unity and strong organizing, especially in a right-to-work state with minimal union protections. The teachers understood two factors behind West Virginia and the other states' successes: One school district led the way for the rest, and enough teachers requested personal days that superintendents had no choice but to close schools. "Durham was our Mingo County," Proffitt explained, referring to the pivotal West Virginia county in coal miners' 1920 bitter struggle to unionize. The well-organized Durham local sprang into action. Within weeks, enough teachers requested personal days that the school board closed the schools. Soon, 42 school districts across the state followed suit.

On May 16, 2018, 30,000 North Carolina teachers participated in the statewide day of action.

In previous years, the NCAE held an annual lobbying day in Raleigh. A few hundred teachers would show up and politely request meetings with legislators to plea for their issues. This year was different. Organize 2020 sought to build teachers' power, not to bow down to the legislators. Instead of sending teachers into the statehouse to meet with legislators, teachers invited legislators out to the mall to speak with them. Rather than milling around for speakers and a photo op, Organize 2020 facilitated mass meetings for each county to further discuss how to push their legislators. While Organize 2020 leaders knew the conservative legislature was unlikely to actually move on their demands, they knew a win was still possible. The victory? Defeating the fear and hopelessness that prevents us from standing together to address shared conditions.

Feeling Powerful

On that May 16, Walker Kelly woke up early. She hadn't slept much the night before. Although the whole day had been carefully planned, she still was nervous—who would actually show up? But within hours, buses poured into Raleigh, 30,000 teachers streaming forth, all wearing red, in the new fashion of "RedForEd" movements. The teachers had never seen anything like it. As Proffitt described, "It was multiracial, multigenerational. It was the entire state. And everybody's in red." Proffitt, Walker Kelly, and another Organize 2020 teacher, Kristin Beller, stood at the back of the downtown mall, watching educators join the march. They wanted to get the size of the thing. When the streets had totally filled, the three of them linked hands and began walking very slowly through the center of the crowds, greeting their thousands of colleagues. At one point, Proffitt, carrying a microphone, jumped on to a ledge. "Do y'all feel powerful?" he yelled to the crowd.

“YES,” they roared back. “Do y’all feel scared?” “NO,” they repeated. “Do y’all feel powerful?” he yelled again. “YES,” they bellowed once more. In the face of uncertainty, they were finding shared purpose.

As much as anything the May 16, 2018, day of action proved the strength of the Organize 2020 caucus and sharpened their ambitions. Conditions had hardly improved over the past year, and Organize 2020 knew there was more work to do. During the 2019 NCAE state convention that spring, Organize 2020 began pushing for another day of action. They polled teachers to assess what issues they should tackle this year, and by the end of the convention, the NCAE approved a list of five demands: to increase school librarians, psychologists, social workers, counselors, and nurses in schools; to provide a \$15 minimum wage for all school personnel and a 5 percent raise for all educators, including a 5 percent cost-of-living adjustment for retirees; to reinstate retiree health benefits that had been eliminated by the 2017 legislature; to restore advanced degree compensation that been stripped by the General Assembly; and, most controversially, to expand Medicaid. Although the teachers knew they were unlikely to convince the Republican legislators of their demands, demanding them was nonetheless important. It helped people articulate connections between education and broader social policies. Those connections, Walker Kelly explained, were the point. “Educators were leading the conversations about what our state needs,” their political education deepening. “It was a beautiful thing,” she said.

May 1, 2019, furthered Organize 2020’s organizing capacity. In 2018, the caucus recruited 50 volunteers for their day of action; in 2019, they had 180. After years of building up structure tests, Organize 2020 believed it had the organizational power to win a statewide union election. In April 2020, the “TB for L” campaign—Tamika and Bryan for Leadership—won. They nearly tripled the number of voters, taking nearly two-thirds of all votes. Their victory opens the doors for new possibilities, new leadership development. Their movement is advancing.

Organize 2020’s success is one of reimagined proportions. North Carolina’s billionaire-backed conservative movement fighting to dismantle public education is one of the strongest in the nation. A victory in a right-to-work state, in which racism, segregation, poverty, and urban-rural divisions have been enabled to fester, is a triumph for progressive movements everywhere. But Organize 2020’s triumph isn’t magic—it’s organizing. 🗳️

Eleni Schirmer is a scholar, writer, and activist from Madison, Wisconsin. She is currently a PhD candidate at University of Wisconsin–Madison studying Educational Policy and Curriculum & Instruction. Her research explores the contradictory capacities of social movements—particularly teacher unions—to shape institutions, identities, and ideas.

Organizing a Caucus in Philadelphia, Step by Step

BY LARISSA PAHOMOV



CHRISTIANE GRAUCKI

On Nov. 7, 2019, I walked into a meeting of hundreds of people I had never met before. The event was at the Church of the Advocate, a historic landmark in north Philadelphia with a deep progressive history, from hosting Black Panther conventions to ordaining the city's first female Episcopal priests. That evening, the cavernous sanctuary

bustled with energy, framed by soaring stained glass windows and murals depicting scenes of faith and justice. More than 300 educators from around the city were gathered, sharing food and stories from the school year. Children ran around the clusters of high-backed wooden chairs, and many attendees sported T-shirts with an image of the Liberty Bell and the slogan “Working Educators for a Stronger Union!”

I bumped into an old friend, and we took in the scene together. We were witnessing the culmination of a dream: a campaign launch to win leadership of our union. After six months of active planning, we were just three months away from the election where the Caucus of Working Educators would hopefully take control of our union, the Philadelphia Federation of Teachers (PFT).

“I just can’t believe how far we’ve come in the last few years,” said my friend. “And to think, this all started with a handful of people meeting in a room.”

I laughed. “I can’t believe how far we’ve come in the last six weeks.” After devoting my summer to campaign planning, I had given birth to a baby boy at the end of September. This was my first event back, and the parade of new faces overwhelmed me, in the best way. In each circle, new recruits talked animatedly with organizers who’d been caucus members for months or years. We had successfully activated rank-and-file union members by reaching out, educator to educator.

Curriculum and Classroom Roots

The Caucus of Working Educators (WE) has several origins, but one of the most significant is the Teacher Action Group of Philadelphia (TAG), a grassroots organization founded in 2008. With a small core of dedicated educators from both public and charter schools, TAG quickly became a force in the city, providing political education for teachers, both to transform their curriculum and classroom practices and to push back on neoliberal education policies, from No Child Left Behind to local charter school expansion. From the beginning, TAG organized events such as an annual curriculum fair and Inquiry-to-Action Groups, mini-courses that explored topics from mindfulness to social justice unionism. Over the years, TAG took on political projects of increasing size and scope, including organizing rallies outside the school district office in response to school closure plans in 2012, and coordinating a “Faces of the Layoffs” website when 3,000 district employees lost their jobs in 2013 to budget cuts. These projects helped raise political awareness but reached only a small fraction of Philadelphia’s thousands of educators. TAG was, by definition, a network of activists, seeking to share a message but not build a base of members.

TAG’s approach could not have been more different from the PFT’s, whose leadership believed in a top-down business model of unionism, where members have minimal input and paid staffers refuse to give out direct phone numbers or

**We had successfully
activated rank-and-file
members of our union
by reaching out the
best way we knew how:
educator to educator.**

email addresses. Predictably, the union leadership did not embrace the activism of TAG, ignoring or rejecting requests to promote or collaborate on projects, and refusing volunteer help in organizing efforts. In the midst of this frustration, the Chicago Teachers Union strike in 2012 showed us how an urban teacher union—led by their new progressive caucus, CORE—could engage an entire city in the fight for better schools. CORE showed us that transformation of our union was possible. However, Philadelphia was still far away from what Chicago had achieved.

Most PFT members had never voted in a union election or even knew it was possible to form a caucus. After a few of us attended the first UCORE conference in Chicago, we pulled together a group of like-minded educators from around Philadelphia and officially founded WE in March 2014. Like TAG—which continued to operate—we had a mission statement and a website. But like union caucuses in other cities, we identified ourselves specifically as being “of the Philadelphia Federation of Teachers” and created an official membership status, where members select the monthly donation they can afford.

From the Classroom to the (School) Board Room

TAG’s formative influence on the caucus meant that our early projects focused more on classroom practice than union matters. One of the first caucus committees was the Racial Justice Committee (“RJ”), which seeks to advance an anti-racist agenda to transform both individual educators and school policy. Inspired by the Black Lives Matter at School Day organized by Social Equity Educators in Seattle in 2016 (see Au and Hagopian, p. 209), RJ members began to think big about how the spirit of this day could be brought directly into classrooms. We decided to organize an entire Week of Action in January 2017, complete with lesson plans across subject areas, resources, readings, and daily events for educators, students, and community members. The first year’s program helped educators make huge inroads for racial justice in their school environments, where sometimes even saying the phrase “Black Lives Matter” had been taboo. School staff around the city incorporated the guiding principles of the movement into their lessons, whether it was reading a children’s book that celebrated Black women and girls or adopting restorative justice practices in their classrooms.

After that year’s success, RJ reflected on what had been achieved and weighed where to go next. It would have been easy to simply replicate the previous year’s program, but instead, committee members asked some hard questions: What would it look like to push for racial justice beyond just individual educators? How could the week advocate for more systemic change?

The answer came out of BLM week’s nationwide explosion in popularity. Sister groups around the country established their own Weeks of Action, and this network established a set of national demands, including mandating Black history and ethnic studies, ending zero tolerance, and hiring Black educators. As public school parent and organizer Tamara Anderson put it, the demands were intended to “become ongoing actions in individual school districts.” In Philadelphia, that meant constantly pushing the administration to release demographic data based

on race and provide proof it was following through on its claims of commitment to diversity. Eventually the school district released data on teachers alongside a new initiative to recruit and retain Black educators.

This success demonstrated that transforming classroom practices could jump-start larger systemic organizing. But we had questions about how we could expand our influence.

To help guide this growth, our caucus invited two special guests to facilitate our 2018 Summer Organizing Institute: veteran organizers Jane McAlevey and Bill Fletcher. McAlevey led us in conversation about our own strengths and challenges as a caucus, especially when it came to the question of how to connect with the entire membership of the PFT. She shared examples of her approach to whole-worker organizing, including preventing the closure of a public housing complex in Stamford, Connecticut. Fletcher pushed us to reflect on our commitment to racial justice and how to bring our values to the larger union membership. He emphasized that, for majority-white organizations, fighting racism was not simply a moral imperative, but one that serves members' self-interest, since racist practices affect all workers. McAlevey and Fletcher helped us zero in on a campaign that would meet all of these criteria: the abysmal physical condition of our schools.

A Campaign for School Facilities Renovation

With a critical mass of buildings built before 1970, and many more than a century old, our school buildings are in perpetual crisis. A 2018 report by the *Philadelphia*

Inquirer revealed cases of severe lead poisoning and botched asbestos cleanup that increased student and teacher exposure. For years the district would make some effort at cleanup but defer major renovations due to lack of funds, especially since the “most urgent repairs” alone were estimated to cost \$3 billion.

As educators we knew exactly what effect this neglect was having, both on ourselves and our students. The call to action was clear: Fix our toxic schools! We drafted a petition

Fletcher emphasized that, for majority-white organizations, fighting racism was not simply a moral imperative, but one that serves members' material self-interest, since racist practices affect all workers.

that demanded all buildings receive proper remediation for lead, asbestos, and pest control—and named viable funding sources that could help make it happen, including corporations and universities in Philadelphia that have benefited from large tax exemptions.

This petition marked the continued evolution of our organization from an activist model to an organizing one. Unlike projects like BLM Week, which involved extensive outreach but were fundamentally opt-in programs, the building conditions petition was designed to move quickly and comprehensively, collect-

ing as many signatures of PFT members as possible during the first part of the school year. We knew that the issue was urgent, but we grappled with whether this campaign would distract from programs like the Black Lives Matter Week of Action. Could the core beliefs of WE be preserved as we shifted into a campaign with even broader reach?

The answer lay in the framing of our work. As educators began circulating the petition in fall 2018, WE's organizing core discussed how to approach the "average" PFT member—one who may not be familiar with structural critiques of our schools. In the activist model, the general expectation was that participants already had the same political analysis as the organization. Programs like Black Lives Matter Week of Action advertised our politics in the title, so the vast majority of participants were already on board with the message.

Of course, we knew that we were fighting to fix our schools for the same reasons we printed thousands of T-shirts that proclaimed "Black Lives Matter"—that it was structural racism, which valued the education of Black and Brown children less than their white counterparts, that had caused chronic underfunding of our school district. We wanted to make sure our colleagues understood this analysis as we asked them to sign on. As a majority-white union, we have many members—including more conservative Black members—who are skeptical of engagement with so-called "social justice issues." We knew this type of organizing would require us to evolve our tactics. How would we bring all our diverse membership on board effectively?

The answer was one that also came out of our classroom expertise—just ask questions. Instead of leading with statements about generational inequality and structural racism—common terminology in the caucus, but less so citywide—we developed a campaign script that asked our colleagues to describe the difficult conditions of their school buildings first, and then point out that nearby suburbs had quickly dealt with mold, asbestos, and other issues as soon as they appeared. And then, the simple question: "Why do you think that is?"

In response, we were able to see what level of political analysis our colleagues held. Some immediately demonstrated the same conclusion we had: "Well, it's racist." But even those who took the answers one step at a time would move toward a more systemic analysis:

"Well, they have more money than us."

"And why is that?"

"Their property values are higher, and they can collect more taxes."

"Yes, and how did that happen?"

"Wealthier people live there because the schools are better."

"And why do we rely so heavily on local taxes for funding our schools?"

"... Because politicians in our state don't care. Nobody's looking out for the city."

"And what's the racial makeup of these suburban districts like?"

"Overwhelmingly white."

"And do these students deserve more than the Black and Brown students in our schools? Do we not deserve buildings free of mold, or asbestos, or mice?"

We never found anyone who felt that this inequity was just—which means that, even if they did not have the exact vocabulary to express it, our citywide colleagues knew quite clearly what impact systemic racism was having on our schools. This approach produced more than 3,000 signatures, which we presented to our school board and City Council the following spring. Just a few weeks later, \$15.6 million in additional funding was announced for building repairs, and more than 20 schools got physical improvements over the summer.

Seeking Power

The conclusion of our building conditions petition rolled us directly into our campaign for leadership of the PFT. Caucus members took on the formidable task of campaigning in other schools and having the organizing conversations that form the building blocks of a high-participation union. Again, we found the best practice for organizing was the one we used in the classroom—ask questions and build common ground from the answers we received:

- If you could change one thing about this school to improve learning conditions for your students, and working conditions for you, what would it be?
- Now, what do you think it would take for our union to win those terms in our next contract?
- Does this sound like something you want to be a part of?

As we built relationships in schools across the city, the answer to that last question was almost always a resounding “Yes!” Few of our citywide colleagues had ever been asked to do anything meaningful by our union leadership, so this conversation was their first taste of what an activated union *could* be like. Our building conditions petition spoke to our own track record of wins, especially in the schools where the funding had resulted in repairs.

Broadening Our Base

When asking people to pledge their vote for us in the upcoming election, I would often finish by saying, “If all you do is vote for us and nothing else, nothing will change. This conversation is the start of a fundamentally different way of running our union.” What’s more, those conversations led to new movements within the campaign. As more paraprofessionals connected with the campaign, it was clear they had not been adequately supported by our union leadership. While paras are the second-largest bargaining unit in the district, the vast majority of them start at a full-time salary of less than \$15,000—and they are consistently treated as interchangeable and expendable. Out of frustration with these enduring conditions, the ParaPower movement was born. Spearheaded by a handful of classroom assistants from different schools, ParaPower quickly developed its own list of contract demands, gained traction on social media, and hosted a summit in the months leading up to the vote.

Moving Forward

On election day, we won 2,700 votes for our complete slate of candidates—twice as many votes as we’d won four years before, and close to 40 percent of the total vote. We had successfully brought many members into our vision of a high-participation union, but fear of change—and an entrenched incumbency who encouraged that fear in their campaign literature—still kept many members from voting for WE. As a result, we did not win any seats on the executive board. This was an intense disappointment, but not a failure, as our campaign had been built to do much more than just claim an office and a title. By engaging with members one-on-one, we activated thousands of new supporters and developed leaders in almost every district school in the city. Those contacts became more active union members over the course of our work, whether it was organizing staff walkouts over elevated asbestos levels or reaching out across bargaining units to ensure that all PFT members earn a living wage in our next contract. And all of it was done with an analysis centered on workers: We are the educators on the ground, and we know what’s best for our own students and buildings. Our organizing model has changed the landscape of our union, expanding mindsets and raising the expectations of our fellow members. As the next round of contract negotiations have already opened, we hope that our fellow members will see that a stronger union is within our reach—and that we will build it one conversation at a time. 

“If you could change one thing about this school to improve learning conditions for your students, and working conditions for you, what would it be?”

Larissa Pahomov is a veteran teacher in the School District of Philadelphia and a founding member of the Caucus of Working Educators. A National Board Certified Teacher, she is the author of the teaching handbook Authentic Learning in the Digital Age and writes about both the practice and politics of working in schools.

New Teachers Energize Their Union!

BY GABRIEL TANGLAO



As a child, I looked forward to visiting my mother's workplace. Like many Filipinos, her pathway to U.S. citizenship was as a professional nurse. One winter day at the hospital, we pulled up to a spectacle that left me in awe: A large group of people marching in circles along the sidewalk. We were greeted by my

mother's co-workers with warm hugs, and the sounds from the crowd were rhythmic and uplifting, as everyone raised their voices in unison. "What are they saying?" I asked. Mom replied, "Our chant lets people know that we are powerful together." This experience marching with my mother at this union rally planted the seeds of collective joy in action that later grew into a deep passion.

**"Our chant lets people know
that we are powerful together."**

Years later when I started teaching in Bergenfield, New Jersey, my first impressions of the local union were less inspiring. The hurricane of paperwork, meetings, lesson plans, and dozens of new colleagues converged into an overwhelming stream of information. It felt like drinking water from a fire hose. I remembered sitting uncomfortably in the dense August air of the auditorium for orientation.

A captive audience of new and returning teachers was enduring a long lineup of white, male, suit-wearing authority figures. "What a waste of time! These are the same PowerPoints they used last year," complained a veteran teacher loudly from the back row.

The local Bergenfield Education Association (BEA) president was the final speaker for that day. He made a mostly dry presentation about legal rights, contract language, grievance procedures, and evaluation processes. In retrospect, the union president's placement at the end of a long, boring program left him with an impatient audience anxious to be set free. "Ugh! We could have just read through the PowerPoints ourselves. Don't they know how much work we have to do to prepare our classrooms?" proclaimed a fearless young lady in the hallway. Her honesty felt like a breath of fresh air cutting through the humidity. We became instant friends.

Jasmin had a quick wit and a wealth of knowledge that made her an engaging person and a great teacher. It must have been fate that we shared a classroom, and taught different sections of the same financial literacy course. I remember being motivated by her relentless commitment. Jasmin spent countless hours planning, preparing, and modifying lessons for her modern world history class. She also served as advisor to the Genders & Sexualities Alliance and Academic Decathlon, and she rarely missed an after-school game. As we grew close, I learned about how influential Jasmin's family was in shaping her character. Her mother, like mine, was also a proud union member.

Jay, a close colleague of ours, taught honors U.S. history two doors down from our classroom. He was highly respected by students, despite his reputation as the "hardest history teacher." Ironically, we had grown up in the same hometown, but only later became friends through teaching. One day during lunch, Jay pitched a game-changing question: "What are your thoughts on our contract?" I admitted, "I haven't carefully read the contract." Then I asked, "How do contract negotiations even work?" This moment eating lunch in the workroom sparked a conversation that lit a flame.

For the next few weeks, we started exploring the contours of our district that led to the current contract. Since we are in a state that recognizes collective bargaining rights, our local union reps negotiate on behalf of all teachers, including teachers at every grade level and all education support professionals. The salary guide is a complex grid that allocated pay scales based on years of experience and level of education. This often leads to thorny decisions that sometimes encourage union leaders to prioritize increased pay for senior teachers over new teachers or vice versa. We also looked into how our pension payments and healthcare costs added nuance to the calculations. It took time to understand the complex process of contract negotiations, but the trail of bread crumbs made us hungry to learn more.

We checked in with each other regularly to share our discoveries. Jay had a methodical nature that gave us important context for the bread-and-butter issues that impacted our take-home pay. Jasmin had great instincts and people skills that helped uncover personal accounts of how contentious elements of the contract played out. I started to identify key players and assess power dynamics through a social justice lens. Bergenfield was one of the most diverse communities in New Jersey with a 40 percent Latinx, 30 percent white, 20 percent Asian, and 10 percent Black student population. But the administrative staff and school board were dominated mostly by white men.

We reached out to the local union officers and asked how we could get involved. After some time, we received no response, and I followed up in person. “Hello,” I said to our union president during a break at an inservice. “I’m Gabriel. I just wanted to follow up on an email we sent last week asking about how Jasmin, Jay, and I could get involved with the union, and help out.” His confused face confirmed that he did not read the email or take us seriously. “Help out?” he repeated. His implication was clear. I was viewed with suspicion as an eager young educator of color—a rarity in this longtime union officer’s circle, I imagined. Our exchange felt a long way from the warm hug that I remember the day of my mother’s union rally. Still, we persisted.

Jasmin encountered a more patronizing, but equally dismissive attitude. Jay was up next. It may have been his powers of persuasion, or his position as a white, heterosexual, cisgender man, but he was our most effective messenger—evident by the result. Soon we were all nominated to serve as “building reps” and asked to attend “just one monthly meeting.” Each meeting started with an opening monologue by the local president who spent an exhaustive amount of time disseminating information. The central message was clear: He speaks, we listen. The occasional daydream would cross my mind of those rally chants: “We are powerful together.”

We began to exercise our voices to ask questions. “Should we use Robert’s Rules of Order during meetings?” I asked. “Where can we find copies of our constitution and bylaws?” Jasmin followed up. “Will we receive an agenda in advance of the next meeting?” Jay asked. This volley of questions was not meant to be disruptive, but rather to help us move business forward and make our union pro-

cesses more transparent. I was soon nominated by a veteran building rep to serve as sergeant at arms and help enforce the rules of parliamentary procedure. These rules can be bureaucratic and confusing, but it was also an opportunity to open up discussion and include more voices. I did my job, perhaps too well.

One of my responsibilities was to keep time during meetings. This sometimes meant calling “time” on people who spoke too long, including officers. “Sorry, that was three minutes,” I would say respectfully. The president bristled at any attempt to check his control of discussions. Having been in power for more than a decade, the local president seemed used to unquestioned authority. This tension grew into hostility at my first winter leadership conference, a regional union event that offered leadership training for members.

As I made my way through the hotel lobby, I walked over toward familiar faces expecting to be welcomed with some friendly greeting. My local presi-

dent took a swig of his drink and slammed his glass on the countertop. He turned to me and said, “You’re not going to tell me I have three minutes to speak in my meeting!” He then launched into a verbal barrage. At first I tried to de-escalate the situation, but I eventually raised my voice to demand some respect. Flanked by the vice president to my side, the president was able to slip away without a clear resolution. His message could be summed up as “know your

**In that moment, I realized
that changing that dynamic
would require more than an
individual confrontation . . .
it was time to squad up.**

place, and stay in it.” In that moment, I realized changing that dynamic would require more than an individual confrontation; it would take collective action. It was time to squad up.

I texted Jasmin to ask if we could meet up after our first training session. We found a quiet table near the lobby to speak privately. She listened intently as I told her about the encounter. Rather than react, we decided to take time to think about our next steps. The following week, Jasmin invited a few trusted co-workers to her house for an informal meeting. I shared my experience with the group, uncertain of how it would be received. I felt affirmed when people shared similar experiences. “This leaves us no choice. How can we continue to work with these people?” one person said. The purpose of the meeting quickly shifted into a strategy session, and thus started “A New Day for the BEA.”

The confrontation with the local president was a turning point in our union journey. It prompted us to organize a slate of candidates and challenge the incumbent officers in the upcoming elections. Our team of five candidates for union office was majority women, and one person of color. Jay ran for president, Jasmin ran for vice president, and I ran for treasurer. We asked Phyllis, the person who nominated me for sergeant at arms, to run for corresponding secretary. She was a veteran middle school teacher with union experience. Fortunately, a friendly elementary school teacher also decided to run for recording secretary. The attitudes of the incumbent officers grew increasingly hostile, but there was no turning back.

In an effort to learn about issues that impacted our members, we organized a districtwide listening tour. Within three weeks, we visited seven out of eight schools, and connected with nearly a quarter of our 450 members. Representatives who were loyal to the old regime attempted to put up roadblocks, but rank-and-file members showed up. Almost every teacher, librarian, secretary, counselor, custodian, and paraprofessional shared stories of their struggles, frustrations, and hopes. “This is the first time I can remember candidates running for union office having ever visited our school,” one woman said with gratitude. The common theme was a desire for greater communication.

It became clear that democratic process had not been exercised regularly in the local for many years. Most people were hard-pressed to remember the last time there were any challengers, let alone a slate of candidates. In fact, it took weeks to even receive a copy of the constitution and bylaws that outlined the election rules, procedures, and timeline. One event that we were encouraged to attend was a meet-the-candidates debate. “They are going to frame us as weak and inexperienced. That will be our advantage,” Jay said with a cool resolve. As coach of the debate team, he was ready to go toe to toe with anyone. The outcome of that event was as clear as the outcome on the ballots.

We won a resounding victory for all five union officer positions. Having successfully campaigned for office, we hoped to transform the culture of our union to be more inclusive and transparent. Our team shared a sense of urgency about the need to engage members from our generation. We were acutely aware from our recent experiences that fresh blood in the ranks of active membership meant a healthier union. It was also visibly apparent that we did not reflect the rich diversity of the Bergenfield student body or local community. “I should not be the only person of color at the leadership table,” I affirmed. But we were moving in the right direction.

We kept the concerns of members from our listening tour at the forefront of our minds. We centered organization, communication, and engagement as our main priorities. Internally, we focused on the empowerment of building reps with opportunities for training, support, and resources that we wished we would have had. That summer, about one-third of our building reps attended the statewide summer leadership conference to participate in trainings on a variety of issues. As I walked into the crowded dining room on the first night, I had a flashback to the previous winter’s confrontation. I heard my name, and started walking over toward the familiar faces waving me over.

One of our new building reps had thoughtfully saved us all seats at a table in the conference dining room. We sat together and shared our excitement about the weekend. This was a new experience for most of our team, and it felt good to have

In an effort to strengthen face-to-face relationships, we mapped the buildings to connect building reps with clusters of members located in their respective hallways.

other people to share in the journey. We checked in with each other at each meal to share discoveries. “Do we use any funding from the PRIDE Community Organizing grant?” one person inquired. “Is there an Evaluation Committee?” added the new building rep. “Who serves on our Legislative Action Team?” another person asked. This was a very different experience from the last conference. It felt like that collective joy in action.

This wave of momentum carried our growing team into the following school year. Starting with small teams of people, we revived the committee structures including the Legislative Action Team, “PRIDE” Community Organizing Committee, Evaluation Committee, and others. In an effort to strengthen face-to-face relationships, we mapped the buildings to connect building reps with clusters of members located in their respective hallways. This effort paid dividends when we invited people to the social events that Jasmin would plan. From happy hours for new members to retirement celebrations, we tried to attract educators to take collective ownership of our union.

We grew into each leadership role with every experience. Jay was our contract guru who mastered the grievance procedures, organized the negotiations team, and was the lead defender of members’ rights. Jasmin’s dynamic personality and thoughtful nature was an incredible asset as she led, planned, and launched a series of membership engagement events throughout the year. I discovered the radical possibilities of this union work in and beyond the district. I represented our local to the Parents Association, community groups, political organizations, and our state and national affiliates. We each discovered our own leadership style, and added to the collective vision in different ways.

I admit that the work was fun and challenging, but also frustrating at times. As chair of our Legislative Action Team, I wanted our union to have a real impact

in our larger community. As we acknowledged the lack of diverse representation in our administrative staff and faculty, we set our sights on the local school board elections. It took months to identify worthy candidates and navigate the complexities of local politics. We spread the word throughout our membership. We partnered with the Parents Association, who hosted a meet-the-candidates night. We even organized a community door-knocking to turn out the vote with Bergenfield residents who were also union members.

Despite all of the time and effort, we were able to help elect only one candidate of color. This did not shift the balance of power, or change the racial dynamic in a

substantive way. This “I” was not a loss, but a lesson: The strategic vision of transformational change takes time, and could take years of sustained collective action. We were also reminded that the power is in the people, not in the position. Organizing to support the campaigns of school board candidates of color led to deeper connections with the community.

We reshaped our local to be more intergenerational and inclusive for educators, students, and families of color.

At the swearing-in ceremony of the newly elected school board members, I was greeted by Andres, a board candidate who had lost the election. Andres, who had migrated from the Dominican Republic to earn his doctorate and planted his family roots in Bergenfield, was a parent of a former student of mine and board president of the Bergenfield Public Library. “Welcome, my friend,” he said. “We would like to invite the Bergenfield Education Association to partner with us on our annual Multicultural Celebration.” That was the beginning of a partnership between our organizations that has allowed us to collaborate for more sustainable change in the community.

From our core team to our rep council, from local membership to community spaces, we used our union as a vehicle to drive change forward. It took time and effort, but we reshaped our local to be more intergenerational and inclusive for educators, students, and families of color. In three years, we reached a contract agreement in record time, established community partnerships, and started to shift the political landscape of our district. None of this was easy, and it could not be done alone. It was a collective effort and truly a labor of love. We learned some simple, yet important lessons: 1) show up; 2) step up; 3) squad up; 4) build community; and 5) enjoy the journey. 📌

Gabriel A. Tanglao is a former social studies teacher in Bergen County, New Jersey. He currently works in the Professional Development and Instructional Issues division for the New Jersey Education Association. This article first appeared in the third edition of The New Teacher Book.

IMPROVING OUR PRACTICE

Peer Assistance and Review in Seattle

BY DREW DILLHUNT



SIMONE SHIN

Early on the morning of Tuesday, Sept. 15, 2015, following four months of contentious negotiations, a six-day strike, and hours of late-night deliberation, the Seattle Education Association (SEA) and Seattle Public Schools (SPS) reached a tentative contract agreement. The agreement, approved by the full membership the following Sunday, included a slate of bread-and-butter gains such as significant pay increases and lower student-teacher ratios. However, the contract also reflected an intentional shift by the union—guided by thousands of individual conversations with members—to expand the field of issues SEA would bargain well beyond the frame of traditional industrial unionism.

As a result, the new collective bargaining agreement also boasted an array of gains focused explicitly on social justice and racial equity. The agreement included 30 minutes of guaranteed, daily recess for all elementary students in the district (students of color continue to receive significantly less recess time on average than their white counterparts). It also guaranteed dedicated training and financial support for 30 racial equity teams in schools across the district. These teams support an ongoing analysis of how racism manifests itself at the building level; they work collaboratively to “interrupt the status quo by mitigating, disrupting, and dismantling the school system’s initiatives that uphold racism.”¹

This shift toward social justice unionism helped to connect the bargaining process to the core values of the membership and communicated to the larger community that SEA was committed to prioritizing the needs of students and families,² even where that meant smaller traditional gains for members in terms of compensation and benefits.

On that final night of bargaining, the only issue left on the table was the indirect use of student test scores in teacher evaluations—a measure introduced in Seattle five years earlier to meet the requirements of the federal Race to the Top Program. The language in the 2010 collective bargaining agreement governing student growth measures had been developed collaboratively by SEA and SPS to ensure that while student growth scores could lead to a closer look at teacher practice, they would remain confidential and would not directly impact evaluations.³ By the time the 2015 teacher strike arrived, however, the push from the SEA membership to have student test scores completely decoupled from teacher evaluation had swelled significantly.

The following morning at the bargaining table, the district bargaining team suggested Peer Assistance and Review (PAR) as a possible way forward that promised to satisfy the interests of both sides by separating student test scores from teacher evaluation while introducing a growth-oriented approach to accountability. It was from that suggestion that the two sides hammered out the remaining section of the tentative agreement:

SPS and SEA agree to develop a Peer Assistance and Review (PAR) program using an interest-based bargaining process during the term of this collective bargaining agreement. The PAR . . . working group will . . . design authentic indicators of teacher performance and discuss the role of assessments in teacher evaluation. SPS and SEA agree to eliminate . . . District-Determined Growth Ratings for the term of this contract.⁴

These three sentences—the last lines to be added that early morning—were not the portion of the tentative agreement most talked about by the media, the community, or even by the membership of SEA. Nonetheless, this short piece of exploratory language not only helped to finalize the collective bargaining agreement, it also had a significant impact on the working relationships between the three constituent groups guiding the work of teacher evaluation: the Seattle Education Association,

the central office of the Seattle Public Schools, and the Principals' Association of Seattle Schools. The interest-based bargaining process called for in this language would be the first of many steps in establishing the kinds of collaborative relationships needed to begin co-constructing systematic solutions to complex problems.

Professional Unionism

Driven throughout by the social justice unionism of the SEA membership, the 2015 collective bargaining process closed with an unexpected invitation from SPS to embark on a collaborative journey of professional unionism. Where traditional unionism understands accountability for the profession as an external responsibility and the exclusive arena of principals and managers, professional unionism strives to “look beyond the self-interest of individual teachers” by framing teachers as “professionals who uphold high teaching standards” while navigating “the interdependency of teachers with the local school authorities.”⁵ PAR systems, and the interest-based work required to develop and sustain them, sit squarely in the domain of professional unionism. (See p. 103.)

That October, the PAR working group, composed of 14 educators (seven SEA members, four district administrators, and three building principals), traveled to Montgomery County, Maryland, for a training at the Montgomery County Education Association titled “Leading to Organize: PAR & Teacher Evaluation.”

During our first four days working with Montgomery County Public Schools, we expected our counterparts there to tell us about how PAR worked in their system. Instead, what they talked to us about was the larger Professional Growth System, of which PAR was just one part. Everyone we talked to in the system—be they teacher union members or district administrators—told us narratives unique to the role they played, and each story had a deeply shared sense of what it meant to be a professional in that district. These shared stories reflected a shared vision and mission around this work, which our system clearly did not yet have.

Most importantly, the entire Professional Growth System was framed through a model of distributed leadership, where those closest to the work drive the work—where educator voice is central to decision-making at all levels of the system. Distributed leadership empowers what Alma Harris has described as “collective influences” to positively impact organizational outcomes.⁶ This immediately resonated as a key interest for the SEA members in the PAR working group.

We were pleased to discover that nearly all of the components of Montgomery County’s Professional Growth System were already in place in Seattle. Unlike many of the other visiting districts, SPS already had a robust mentoring program for new-to-profession teachers and a parallel program for coaching experienced teachers who received below-proficient evaluation ratings, as well as a building-based teacher leadership program codified in the 2010 collective bargaining agreement. All three of these components already had dedicated financial and logistical support in our system. While there was plenty of work to do coordinating these components under a shared vision, we wouldn’t need to build these components from the ground up.

What stood out to the working group most clearly was what our system was missing. A key component of the Professional Growth System in Montgomery County is their foundational coursework series. The series includes two courses on effective teaching practices (all teachers in the district take this course) and another on observing classroom practice and giving effective feedback (expected of all building evaluators and consulting teachers). These courses are designed and facilitated by teacher-leaders. We had nothing parallel to this in our system.

“Evaluation alone will not improve practice,” writes Linda Darling Hammond; “productive feedback must be accompanied by opportunities to learn.”⁷ Any effective system of teacher evaluation and accountability must have at its core a system of growth-oriented supports. That system of supports must explicitly communicate and actively engage teachers in learning not just the standards of effective teaching, but also the *how* and *why* of effective teaching.⁸ Ensuring an effective teacher in every classroom is impossible where we don’t yet have a shared vision or language of effective teaching.

We left Montgomery County convinced that in order to develop an effective PAR system, we had to commit to undertaking the much broader and larger project of developing a truly coordinated system of professional growth by developing foundational coursework and fully integrating that coursework with our already existing components of support.

Identifying Shared Interests

Back in Seattle, the number of voices represented in the working group expanded, with each constituency identifying additional members to more fully represent the many perspectives in the system. The group of nearly 40 educators who agreed to be part of designing the new professional growth system included classroom

teachers, mentor teachers, union leadership, union staff, building principals, and central office administrators. The next step was to develop a plan.

Given the fractured trust that still characterized the relationship of our three constituent groups as a result of the recent strike, Ellen Holmes, our NEA facilitator, encouraged us to take time to independently caucus as three separate constituent groups (SEA, central office, and the principals’ association) both prior to and following our shared work together back in Seattle.

This intentional caucusing helped to normalize the reality that we would continue to have positional differences around some issues (e.g., compensation and class size) even as we identified significant overlaps in our shared interests.

Perhaps somewhat counterintuitively, having the opportunity to name our

Having the opportunity to name our differences in our constituent groups allowed us to better see our shared interests when we met as a full group. This process slowly fostered a sense of trust in our relationships with one another.

differences in our constituent groups allowed us to better see our shared interests when we met as a full group. This process slowly fostered a sense of trust in our relationships with one another. We were able to lean into productive conflict around our shared work. The process acknowledged that we didn't need to agree on everything, or even most things, in order to work productively together toward our shared interests.

From our list of shared interests—which, to the surprise of many of us, was not a short one—emerged five distinct working groups, each focused on a specific component of the coordinated professional growth system we were now designing. These components included Foundational Coursework, the Teacher Leadership Cadre, the Consulting Teacher Program, the PAR Panel, and the Professional Growth and Educator Support System (PGES) Steering Committee. The five proposals developed in these groups would eventually be formalized as the SPS Professional Growth and Educator Support System in the 2018–19 SEA collective bargaining agreement.

Unsurprisingly, the three-year path leading from the launch of the PAR working group to the adoption of those proposals was neither simple nor straightforward. Members left the working group; new members joined. We relaunched the interest-based bargaining process and we developed norms all over again. A new superintendent took the helm of the district just prior to the ratification of the one-year contract in which the proposals from the PAR working groups were codified in the collective bargaining agreement. Yet, as a result of the shared commitment to the work by all three constituent groups and because of the principled relationships that had been developed, the work continued to grow and our shared interests began to coalesce into a shared vision.

Peer Assistance and Review

Classroom teachers who are released from their building to provide individualized coaching and assessment of instructional practice, known as consulting teachers, are the core of any PAR program. In Seattle, these teachers serve for a term of no longer than five years and must return to a classroom assignment for at least three years before being eligible to reapply. Consulting teachers are chosen for their teaching and leadership skills and receive ongoing training around effective mentoring.

Because Seattle already had a well-established mentoring program, the biggest change that has resulted from the shift to PAR is the addition of the consulting teacher summative assessment of teacher practice. Assessment had not previously been part of the mentor role. The PAR program was piloted over the course of the 2017–18 school year with 10 participating classroom teachers, all of whom had already received a full year of mentoring (but had not yet reached a fully proficient overall evaluation rating).

The 10 teachers who agreed to participate in the pilot were offered the opportunity to receive a second year of consulting teacher support with the understanding that they would engage in and give feedback on the newly expanded consulting teacher role. The PAR pilot allowed the assessment processes outlined in the pro-

posals to be launched on a small scale under low-stakes conditions with ongoing feedback from participating teachers. It also allowed the eight consulting teachers who took part in the pilot to share their perspectives on how a shift to PAR, and the inclusion of the summative assessment, might affect their practice as mentors and their learning-focused relationships with participating teachers.

In parallel, Seattle piloted the PAR Panel, a deliberative body composed of eight SEA members and eight members of the principals' association. The panel serves as the designee of the superintendent and makes consensus-based decisions about continuing contract offers, additional consulting teacher support, and non-renewal. All panel decisions are made in closed deliberations informed by anonymized principal evaluations and consulting teacher assessments. The identity of the classroom teacher, the building evaluator, and the consulting teacher are not known by the panel.

Over the course of the pilot year, the panel finalized its norms and engaged in practice cases. The PAR Panel also worked with SEA's Center for Racial Equity to begin the ongoing work of developing tools and protocols to explicitly name implicit bias as it shows up during the panel's consensus-based decision processes.

In the fall of 2018, following the ratification of the new collective bargaining agreement, Seattle's PAR program launched at full scale, serving both new-to-profession teachers and experienced teachers not currently meeting the performance schedule. Experienced teachers who were already working with a consulting teacher prior to the shift to PAR were given the opportunity to opt into PAR (which all of them did).

In order to truly cultivate distributed leadership, the design of a PAR program must be the result of an ongoing interest-based process at the local level. As a result, the mechanics of each PAR program, including how teachers enter into PAR, vary widely from district to district.⁸ In Seattle, all new-to-profession teachers are automatically entered into PAR and receive a full year of consulting teacher support. That support can be extended to a second year—and in rare cases a third year—by the PAR Panel. Building evaluators may also refer experienced teachers with provisional contracts (three or less years of service in the district) for PAR support following two observations where significant performance concerns are identified and communicated explicitly to the classroom teacher.

Experienced teachers with continuing contracts are required to enter PAR only as the result of an overall below-proficient summative evaluation. However, experienced teachers with continuing contracts may also choose to request PAR in coordination with their evaluator, as soon as significant concerns are raised, in order to access early consulting teacher support. Teachers with continuing contracts generally receive consulting teacher support for one to two years.

Having the PAR program explicitly named in the collective bargaining agreement has guaranteed significant and consistent financial support from the central office for developing and sustaining the new PGES. In 2018, when all five components were added to the collective bargaining agreement, existing programs were consolidated, which streamlined the work and allowed us to hire three additional consulting teachers, bringing their total number to 21. This has allowed the con-

sulting teacher program to ensure manageable consulting teacher caseloads (an average ratio of 1:17) as the assessment role of PAR is added to their work.

As a result, there are now 26 SEA members housed in the human resources department, coordinating and implementing the work of the PGES. This has been an essential step not only in ensuring that the PGES is a coordinated system but also in maintaining the connectivity between SEA and the central office needed for this interest-based work.

Foundational Coursework

During the final months of the working group's three-year design period, we finalized the overarching vision statement for the Seattle PGES, which would ultimately appear in the collective bargaining agreement.

Seattle Public School Educators believe that education is a civil right. Our Professional Growth and Educator Support System . . . is designed and managed by those who work closest with students . . . and centered on quality student learning for all.¹⁰

While this language is deeply connected to our core values of educational equity and distributed leadership,¹¹ it does not in itself ensure any substantive change in our systems. What it does do is explicitly formalize those values as the foundation of our shared work in the PGES. This provides a dependable space from which to ask the question “Is the current design of our systems aligned with our professed values?” Where the answer to that question is “No,” we must commit to change.

This vision statement has already had an impact on the development of the foundational coursework, which all new-to-profession teachers and all teacher leaders are expected to complete. While the design team's initial focus was almost exclusively on supporting educators in developing their practice as culturally responsive teachers,¹² we quickly realized that in order for the learning activities to align with the vision of “education [as] a civil right,” participants would also need ongoing opportunities to develop and sustain their racial equity literacy—understanding that an examination of our own unconscious and dysconscious beliefs as teachers must be at the center of any culturally responsive practice.¹³

This realization led the design team to create an initial draft of what would eventually become Seattle's Foundational Beliefs for Supporting Student Learning.¹⁴ These five foundational beliefs, intended to guide the work of all educators in our system, explicitly name the ongoing impact of racism in our system and the necessity of active countermeasures in all parts of that system. The adoption of these five beliefs by SPS has in turn supported both consulting teachers and building principals as they work to more explicitly communicate what effective culturally responsive practice looks and sounds like in the classroom.

The SPS foundational beliefs document continues to be an avenue for the work of the PGES to come alongside the already well-established anti-racist leadership within SEA and SPS. During the pilot of the foundational coursework,

members of the SPS Department of Racial Equity Advancement engaged in the course as participants and provided actionable feedback on the coursework. This process helped not only to refine the content but also to make the facilitation of the coursework more culturally responsive. A key shift was beginning to intentionally disrupt the white supremacy norms (e.g., individualism, discomfort with feelings, and “product over process”) that are consistently baked into the way we deliver learning to students and adults alike.¹⁵

Professional Unionism as Anti-Racist Work

School systems in the United States were never designed to serve all students. Peer Assistance and Review and the other professional structures will not inherently disrupt racist policies and practices. They must be explicitly designed to do so—otherwise they will simply reinforce and deepen existing patterns. In Seattle Public Schools, as in many districts across the country, teachers of color are disproportionately identified as having performance concerns. This pattern of disproportionality exists both in districts with PAR and in districts without it.

In a truly anti-racist professional growth system, we should expect that disproportionality to disappear over time. In order for this to happen, our PGES will need to come fully alongside the already established anti-racist leadership within SEA and SPS. We’ve been in partnership with the University of Washington from the very beginning of this work to collect baseline data to analyze the impact of the changes we’ve implemented. We will need to continue to ask hard questions to see if the systems we’ve created are doing the anti-racist work they were intended to do. If not, those systems will need to be redesigned.

Ultimately, the lessons we’ve learned as a system through this process are not about the importance of implementing a PAR program. Rather, our lessons as a system have been about the power of engaging in productive conflict using an interest-based approach, about implementing a model of distributed leadership where those closest to the work, in this case classroom teachers, drive the work.

It’s too early to make any definitive claims about the impact the new PGES is having on teacher growth and student learning in Seattle Public Schools. However, what we do know is that, as a result of consulting teacher assessments, 59 new-to-profession teachers (roughly a quarter of those supported) have already been recommended for additional consulting teacher support, which they would not have otherwise received. This year, the consulting teacher program was also able to offer new-to-profession teachers of color the option of requesting a consulting teacher of color (an option that 23 teachers of color took advantage of).

Distributed leadership has already begun to create collaborative spaces within the PGES where collective influence is not only possible but also encouraged. The leadership of the PAR Panel and the PGES Steering Committee, for example—both composed of SEA, central office, and principals’ association members—led to specific changes in how teacher evaluations are written to ensure they more clearly communicate a full picture of teacher practice. As long as Seattle’s PGES continues to develop in alignment with the core values outlined in its vision statement, this

collective influence will expand. However, only with members continuing to push from within—as well as from without—will we be able to fully interrupt and redesign our systems in ways that are explicitly anti-racist and which allow us to meet the needs of all educators and all students in our district. 🌱

Drew Dillhunt is PAR/PGES coordinator for Seattle Public Schools.

ENDNOTES

¹ Hawkins, Uti. April 20, 2019. Racial Equity Teams Institute. Training facilitated at Seattle Public Schools.

² Sheridan, David. 2017. “Seattle Educators Get Their Mojo Going by Embracing Equity in Collective Bargaining.” *EdJustice*. neaedjustice.org/2017/05/11/seattle-educators-get-mojo-going-embracing-equity

³ Collective Bargaining Agreement Between Seattle Public Schools and Seattle Education Association Certificated Non-Supervisory Employees (2010–2013, Article XI, Section E). Seattle Education Association. seattlewea.org/file_viewer.php?id=2227

⁴ Collective Bargaining Agreement Between Seattle Public Schools and Seattle Education Association Certificated Non-Supervisory Employees (2015–2018, Article XI, Section F). Seattle Education Association. seattlewea.org/file_viewer.php?id=2198

⁵ Peterson, Bob. 1999. “Survival and Justice: Rethinking Teacher Union Strategy.” *Transforming Teacher Unions: Fighting for Better Schools and Social Justice* (Bob Peterson and Michael Charney, eds.): p. 11–19. Rethinking Schools.

⁶ Harris, Alma. 2013. *Distributed Leadership Matters: Perspectives, Practicalities, and Potential*. Corwin: p. 116.

⁷ Darling-Hammond, Linda. 2013. *Getting Teacher Evaluation Right: What Really Matters for Effectiveness and Improvement*. Teachers College Press: p. 99.

⁸ Danielson, Charlotte. 2013. *The Framework for Teaching Evaluation Instrument* (2nd edition).

⁹ Johnson, Susan et al. *A User’s Guide to Peer Assistance and Review*. Harvard Graduate School of Education. gse.harvard.edu/~ngt/par

¹⁰ Collective Bargaining Agreement Between Seattle Public Schools and Seattle Education Association Certificated Non-Supervisory Employees (2018–2019, Article II, Section D). Seattle Education Association. seattlewea.org/file_viewer.php?id=20236

¹¹ See *Educational Equity: A Definition*. National Equity Project. nationalequityproject.org/resources/featured-resources/educational-equity-a-definition

¹² Using *Culturally Responsive Teaching & The Brain: Promoting Authentic Engagement and Rigor Among Culturally and Linguistically Diverse Students* (Hammond, 2014) and *The Skillful Teacher* 7th edition (Saphier, et al., 2017) as core texts.

¹³ King, Joyce. 1991. “Dysconscious Racism: Ideology, Identity, and the Miseducation of Teachers.” *Journal of Negro Education* 60(2): p. 133–146. doi.org/10.2307/2295605

¹⁴ See *Foundational Beliefs for Supporting Student Learning* (2019, version 2.0). Seattle Public Schools. seattleschools.org/FoundationalBeliefs

¹⁵ Okun, Tema. 2010. *The Emperor Has No Clothes: Teaching About Race and Racism to People Who Don’t Want to Know*. Information Age.

¹⁶ Smith, Allison. 2019. “The Counternarrative of Teacher Evaluation: The Kangaroo Court, the Salem Witch Trials, and the Scarlet Letter.” *Education Sciences* 9(2): p. 147. doi.org/10.3390/educsci9020147; Drake, Steven, Amy Auletto, and Joshua Cowen. 2019. “Grading Teachers: Race and Gender Differences in Low Evaluation Ratings and Teacher Employment Outcomes.” *American Educational Research Journal* 56(5): p. 1800–1833. doi.org/10.3102/0002831219835776

¹⁷ “Driving Diversity with Data.” 2019. University of Washington College of Education. education.uw.edu/research-that-matters/2019/diversity-data#cb01



Leaders

Ganz on Leaders
Trusted and Respected
Leader, Mobilizer, Activist



NATIONAL
EDUCATION
ASSOCIATION

Adapted from Marshall Ganz, People, Power, Change 2018

***Leadership Development Cycle:
Identify, Recruit, Develop***

Leadership development work occurs as a cycle, as shown in Chart #6: identifying potential leaders (opportunities for them to emerge), recruiting them into leadership positions (opportunities for leadership to be earned), and creating opportunities for them to develop their capacity (opportunities for leaders to grow) on an ongoing basis. It requires learning how to delegate - and mean it; creating a supportive organizational structure; and providing coaching.

Identifying leadership requires looking for it. Who are people with followers? Who brings others to the meetings? Who encourages others to participate? Who attracts others to work with them? Who do other people tell you to “look for??” Alinsky writes about community networks knit together by “native” leaders - people who take the responsibility for helping a community do its work out of their homes, small businesses, neighborhood hangouts, etc. They can be found coaching athletic teams, organizing little leagues, serving in their churches, and surfacing in other informal “schools” of leadership. Where would you look for these kinds of leaders around here?

Although leading is a matter of “doing” and not “being” – and people do leadership work in different ways - there are some clues you may want to attend to, especially when looking for people that will make good organizers. It is hard for a person who has not learned to be a *good listener* to become a good organizer. You have to understand the interests of your constituency if you are to help them act on those interests. Listening means learning to attend to feelings - *empathy* - as well as to ideas because the way we feel about things affects our actions more than what we think about them. *Curiosity* helps us see the novel as interesting rather than threatening, enabling us to learn how to face new challenges that are always a part of organizational life. A good *imagination* helps because strategizing is a matter of imagining different futures and possible ways to get to them. A sense of *humor* helps you from taking yourself and your troubles too seriously and helps keep things in perspective. A *healthy ego* is very important. Arrogance and a wish to dominate others are usually signs of a weak ego constantly in need of reassurance. Leadership also requires *courage* - the willingness to take risks, make choices, and accept the consequences.

Recruiting leadership requires giving people an opportunity to earn leadership. Since followers create leaders, they can’t appoint themselves and you can’t appoint them. What you can do is create opportunities for people to accept the responsibilities of leadership and support them in learning how to fulfill these responsibilities. If you have to get the word out for a

Adapted from Marshall Ganz, People, Power, Change 2018

meeting, you can get three of your friends to help you pass out leaflets in the Yard one day or you can find one or two people in each House who will take responsibility for recruiting 5 people from their House to attend. They earn their leadership by bringing the people to the meeting. What other ways can you think of that you can give people the opportunity to earn leadership?

No matter how careful you are, leadership development requires coming to terms with the fact that it entails risk. Risk small failures early in the life of a project in order to avoid big failures later on. If you take the risks required to learn to delegate, you will learn how to do it and you will learn who "comes through" and who doesn't. It is important to learn this with a small meeting at stake and not the monster rally of 5000 at which only 50 people show up. One reason to set up quantifiable goals, regular reports, and ongoing evaluation is to detect early failure and success so they become "learning opportunities" for everyone. "So, Mary, why did that work so well?" "So, Sam, what happened there? What could you have done differently?" Don't assume everyone is going to do everything right from the very beginning because it never happens. Also, it is often not completely clear what the "right" way is at the beginning of a project. Think about how to turn this fact to your advantage. Where can you get the courage to take the risk of letting other people share in the responsibility for outcomes you care about?

We only develop good judgment about whom to select by taking risks, making choices, experiencing success and failures, and learning from this experience - and we will still be surprised. On the other hand, the more experienced we are the better judgment we can begin to develop. There is no "rule book" to go to on this, but if you are afraid to risk making choices, you never learn to make good choices. Here are some questions you might ask yourself. How do you select to whom to delegate? How do you know who the right person is? How can you find out ahead of time? How do you know when a person is ready for a big job? Are you selecting them because they are easily available or because they are the right people for the job? Are you selecting them because they already know what to do because you have worked together before or because they "look as if they can learn what to do" with some good coaching? Or did you select them because you "heard" they were good? Where did you hear that? Who told you? Should you believe them? How do you know?

Developing leadership requires structuring the work of the organization so it affords as many people as possible the opportunity to learn to lead - *delegation*. Distributing the leaflets through House Committees, for example, shares the responsibility for engaging others with many people. It is true organizing the work in this way can be risky. You may delegate to the wrong people; they may let you down; etc. But as Moses learned from Jethro, if you fear delegating, the strength of the community is stifled and can never grow. But you can do things to increase the chances of success. Leadership training sessions help clarify what is expected of leaders in your

Adapted from Marshall Ganz, People, Power, Change 2018

organization, give people the confidence to accept leadership responsibilities, and express the value your organization places on leadership development.

Developing leaders is not about assigning tasks, but offering responsibility. It is different to ask: “would you make these 50 phone calls telling people about the meeting?” versus “would you take responsibility for getting 10 people to come to the meeting? You will? Great! Here’s some things that may help you contact them and get them there -- a list of names and phone numbers of people who said they were interested, 100 leaflets, some posters, and some sign-up sheets you could use to get commits.” Do you see the difference? With the “task,” the person can become a kind of yo-yo: go do this, come back for what’s next, go do that, come back for what’s next. They are “helping” you with your responsibility. With a “responsibility,” the person takes it and runs with it, and you can help them meet “their” responsibility. But when looking for someone to take responsibility, don't make the responsibility easier, and easier, and easier...until there’s nothing left. The challenge is in learning to motivate people to accept the level of responsibility needed to get the job done. And when a person has accepted responsibility, the motivation work continues. Keeping others motivated, keeping yourself motivated, and getting the work done go together. All are based on real accountability, lots of coaching, and lots of recognition of success.

Responsibility is only real, however, if the person is clearly accountable for the responsibility he or she accepted. Accountability should be regular, specific, and timely. The point of accountability is not to catch someone to punish them, but to learn what kind of results they are getting so everyone can learn from them. If someone is having trouble, we need to learn why so we can figure out what to do about it. If someone is being successful, we need to learn why so we can try the same thing in other places. Without accountability the most important learning we can do in the course of a campaign - systematic reflection on our own experience - is impossible. You cannot expect a person to take responsibility without authority. If you want someone to take the responsibility to get 10 people to a meeting, hold them accountable, provide training, offer support - but give them the authority to do what they’ve been asked to do. If you see or hear of them making a mistake - or think you can do it better - this means going directly to them, not around them or taking care of it for them. It is really a matter of basic respect.

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. 📌

John Donaghy is a former middle school math teacher and president of the Highline Education Association, as well as a former organizer for SEIU. He served as executive director of the Seattle Education Association from 2013 to 2019 and now works for the NEA Center for Organizing.

He was fired by Amazon 2 years ago. Now he's the force behind the company's 1st union

April 2, 2022 7:56 AM ET Heard on [Weekend Edition Saturday](#)

Chris Smalls, president of the Amazon Labor Union, takes an interview at the Amazon distribution center in the Staten borough of New York on Oct. 25, 2021, after earlier delivering "Authorization of Representation" forms to the National Labor Relations Board in New York.

Craig Ruttle/AP

"He's not smart, or articulate."

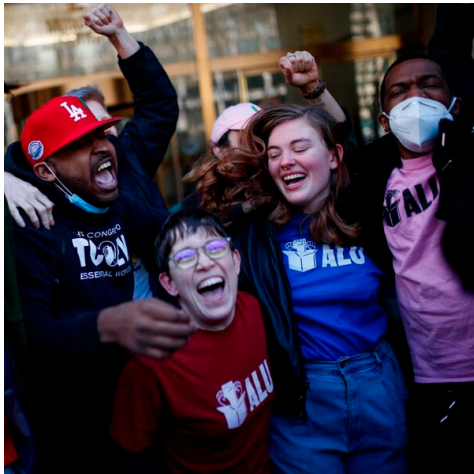
Those were the words used by a top Amazon lawyer to describe former warehouse worker Chris Smalls.



part in
Island

Smalls had led a [walkout](#) at the start of the pandemic in 2020 to protest working conditions at the Staten Island, N.Y., warehouse where he worked. He [was fired](#) the same day.

The [memo that contained those biting words was leaked](#) just a few days later. But the words would stay with Smalls. They became the fuel that would drive him to lead one of the most dramatic and successful grassroots union drives in recent history.



In a stunning victory, Amazon workers on Staten Island vote for a union

"When I read that memo, that motivated me to start an organization," said Smalls, celebrating [the historic victory](#) of the Amazon Labor Union on Friday, making the warehouse Amazon's first unionized workplace in the U.S. Friday's triumph would come almost two years to the day of his firing.

At the time, Amazon said Smalls had violated quarantine and safety measures. But Smalls said he was fired in retaliation for his activism. The New York attorney general followed with an [investigation and sued](#) Amazon for the incident and even sought to get Smalls his job back. Smalls didn't sit still after being fired, and formed the Amazon Labor Union soon after.

Meetings at a bus stop, barbecue and funding through GoFundMe

Smalls had zero union background, nor did he rely on any established labor groups for funding and organizing power. Instead he raised money for the operation through GoFundMe. Smalls and his co-founder Derrick Palmer — who's still working at the warehouse — reached out to their coworkers.

The bus stop used by workers became their gathering place. They'd wait there to talk to workers who were heading home from their shifts. They'd have a bonfire going, with s'mores, and get people talking. They invited workers to cookouts.

"We had over 20 some barbecues, giving out food every single week, every single day, whether it was pizza, chicken, pasta," Smalls said. He even brought home-cooked food from his aunt to some of these gatherings.



Chris Smalls (center), president of the Amazon Labor Union, joins supporters as they march and chant at the Amazon distribution center in Staten Island on Oct. 25, 2021.

Craig Ruttle/AP

They talked to workers about fighting for their rights, about the grueling toll of the job, how you're on your feet, doing very repetitive, very physically demanding work, for hours. About the breaks that are few and too short.

No one expected this scrappy grassroots campaign to emerge victorious against the behemoth company.

Indeed, [a first attempt failed](#). But Smalls persevered, eventually meeting the 30% threshold necessary to hold a vote.

Amazon got Smalls arrested for

trespassing

Amazon, meanwhile, spent millions of dollars on labor consultants to fight the union campaigns. The company held mandatory meetings with workers in the warehouse, urging them to vote No.

BUSINESS

Why a mailbox continues to loom over Amazon union vote at Alabama warehouse

Amazon even had Smalls and a couple other organizers arrested for trespassing while they were delivering food and union materials to the warehouse parking lot earlier this year. Amazon's argument to workers is that it is already a great place to work, without a union. It offers competitive pay, and generous benefits like health care coverage for full time employees and full tuition for college.

But Smalls' efforts clearly bore fruit.

Almost 5,000 workers cast their ballots and the votes to form a union were won by a significant margin — more than 500 votes. Amazon had wanted to belittle the union drive two years ago, when as part of its PR strategy the company said it would make Smalls "the face of the entire union/organizing movement."

And that's exactly what happened. Except today, Smalls has become the face of one of the most successful union drives in recent history.

And Amazon has suffered an embarrassing defeat.

"Amazon doesn't become Amazon without the people," Smalls said. "And we make Amazon what it is."

FEATURE LABOR

These Are The Workers Who Took on Amazon, and Won

Against all odds, Amazon workers in New York organized a successful union against one of the biggest companies in the world. Here's how.

LUIS FELIZ LEON

MAY 23, 2022



ILLUSTRATIONS BY ANNEE SCHWANK



Hey, Jeff Bezos, I'm going to let you know something today: We are just getting started," Chris Smalls declared at an August 2020 protest in Washington, D.C. August 2020 was the month Amazon founder Jeff Bezos became the richest person in recorded history.

Outside of his \$23 million, 27,000-square-foot pied-à-terre, a group of Staten Island Amazon workers and a crowd of supporters erected a mock guillotine.

"Give a good reason why we don't deserve a \$30 minimum wage when this man makes \$4,000 a second," Smalls went on.

After leading a walkout over Covid-19 safety at Amazon's mammoth JFK8 warehouse in March 2020, the first month of the pandemic, Smalls and his coorganizers took their rebellion on the road that summer. Outside Bezos' mansions—a \$165 million Beverly Hills home, a waterfront estate outside Seattle and a Fifth Avenue Manhattan penthouse—the group staged demonstrations denouncing income inequality and demanding wage hikes and protections for workers given the pandemic designation of "essential."

At each stop, they quietly grew the ranks of supporters who also sensed that the scrappy movement was the start of something big.

Those early supporters included Cassio Mendoza, then 21, who decided to show up to the October 2020 protest in Beverly Hills after connecting with Smalls on Instagram.

"Wow, this is really different," Mendoza remembers thinking at the protest.

"Talking about billionaires, 'They gotta go.' Damn! This is really radical."

Mendoza would soon move across the country to take a job at JFK8 and ultimately help win the first-ever union at any of Amazon's U.S. warehouses.

Since the Amazon Labor Union's stunning win in April, much of the media analysis around the victory has been centered on Smalls. Just as important, however, is the collective story of the workers who charted their own path against one of the world's biggest companies.

What became the Amazon Labor Union (ALU) brought together an organic group of leaders demanding safety and dignity at Amazon—some with prior union experience—and a diverse, roving band of

socialists in their 20s seeking to join a righteous labor fight. After setting their sights on a union election at the JFK8 warehouse, the group was joined by veteran warehouse workers who brought a deep bench of experience and relationships to the campaign. All of them were essential to the ALU's upset win to represent more than 8,000 warehouse workers.

In May, Amazon's union-busting efforts dealt the ALU a defeat in its second union election, this time at LDJ5, a smaller sort center across the street from JFK8. Out of roughly 1,633 employees eligible to vote in the election, nearly 1,000 cast ballots, with 380 workers voting in favor of the union and 618 against.

The outcome is disappointing but not entirely surprising for ALU leaders, who say they faced even steeper odds at LDJ5, a newer facility comprised largely of part-time workers. After the union's first win sent shockwaves through the U.S. labor movement, the ALU says that hundreds of Amazon workers nationwide have reached out for support in their own organizing efforts. There's every reason to think that the ALU is still just getting started.



ILLUSTRATIONS BY ANNEE SCHWANK

ESSENTIALLY DISRESPECTED

It's fitting that the last day of voting at JFK8 fell on March 30, marking the two-year anniversary of the walkout that jumpstarted the organizing effort there.

Staten Island's first case of Covid-19 case was confirmed March 9, 2020. Things escalated quickly in the following weeks.

While infections rose, "They weren't giving us masks," says Gerald Bryson, a warehouse picker in his 50s who had been a union member at previous jobs.

Instead of responding to the pandemic, Amazon organized what Derrick Palmer, 33, describes as a "mini-carnival" to recruit workers to racial and ethnic affinity groups, crowding employees into a small room and handing out plates of food while people milled about maskless.

"They totally disregarded Covid," Palmer remembers. Worker Jordan Flowers, then 21, has lupus and was awaiting a kidney transplant, which put him at high risk for Covid complications. As Flowers saw stories of people dying across the country that March, he grew increasingly concerned about the lack of personal protective equipment at work.



Cassio Mendoza

ILLUSTRATIONS BY ANNEE SCHWANK

“I’m my mom’s only child,” Flowers says. “I wasn’t gonna risk my life to work for this company.” Amazon had already fired him once anyway, when he took short-term disability in 2019, but the company reinstated his employment shortly after he challenged the termination.

Chris Smalls' job as a process assistant at the warehouse, a training role adjacent to management, gave him responsibility for approximately 60 people. Alarmed that managers weren't properly notifying employees when someone they'd worked with tested positive for Covid, Smalls took it upon himself to warn workers of their possible exposure.

Jason Anthony, 36, was one of the workers under Smalls. "Our relationship evolved from a worker-supervisor thing to a brotherhood, a bond that will never be broken," Anthony says. "We call each other brother and sister. We care about each other. That's something that Amazon doesn't even do—care about their own people."

In the afternoon of March 30, 2020, workers filed out of the New York warehouse, led by Bryson, Palmer, Flowers and Smalls. They demand Amazon close the facility for cleaning and offer employees paid time off in the meantime.

"Alexa, please shut down and sanitize the building," one of their protest signs read.

Amazon fired Smalls that day, claiming he violated the company's quarantine rules. Amazon fired Bryson the next month, though an administrative law judge ordered the company reinstate him two years later in April 2022. Amazon gave Palmer a "final warning" and put Flowers on medical suspension.

According to a leaked memo, Amazon's chief counsel denigrated Smalls soon after, calling him "not smart, or articulate" and suggesting a press narrative of "us versus him." Amazon did not respond to a request for comment.

This narrow focus on Smalls ultimately backfired on Amazon, elevating Smalls to the status of a martyr while underestimating the depth of worker anger. The more that Amazon singled out Smalls, the more organizers could focus on talking to their coworkers and bringing new people into the union campaign.

Meanwhile, Smalls' story reached workers far and wide. Brett Daniels, 29, got in touch with Smalls via social media after the walkout. At the time, Daniels was working at a dine-in movie theater in a suburb of Phoenix. When he was laid off due to pandemic-related closures, he picked up a job as a seasonal hire at an Amazon facility in Arizona with the hope of organizing among fellow workers. The child of a union firefighter and flight attendant, Daniels hoped to organize a union after years of community organizing experience, including the Fight for \$15 in Tucson, Ariz.



Chris Smalls

ILLUSTRATIONS BY ANNEE SCHWANK

Inspired by the pandemic walkout, Daniels moved to Staten Island in November 2021 and was rehired at Amazon. “Almost all—if not all—of the organizers here were inspired by Chris, Derrick, Gerald and Jordan leading that walkout,” Daniels says.

Connor Spence, 26, also relocated from New Jersey to take a job at JFK8 in May 2021, shelving his aviation training to become an organizer instead of a pilot.

Smalls’ story “was emblematic of everything that’s wrong with Amazon—everything that’s wrong with society at the time,” Spence says.

Instead of backing down after his firing, “Chris was motivated to take the momentum and use it to fix the things he saw that were wrong with Amazon,” Spence says. “That was inevitably going to attract other people who wanted to actually step up, take action and change things.”

A UNION IS BORN

On May 1, 2020—International Workers’ Day—Smalls, Bryson, Flowers and Palmer launched the Congress of Essential Workers, a predecessor to what would become the Amazon Labor Union. The group’s original goal was to unite frontline workers across industries in the fight for better conditions and pay. Jason Anthony joined up after he was fired from Amazon in July 2020.

The group envisioned a broad working class struggle against billionaires profiting from the pandemic—and they didn’t mince words.

“The capitalist economy of the U.S. is built off the backs of a class of underpaid people who are degraded to wage laborers and valued only for what they produce, not for their intrinsic value as humans,” reads the Congress of Essential Workers’ [website](#).

As they traveled the country to protest at Bezos’ mansions, the group forged stronger bonds with each other while welcoming newcomers, an approach Smalls describes as “all-inclusive” with a caveat.

“It is Black-led, and we’re gonna keep it that way,” Smalls says he would explain as people joined. “Once we have that understanding, we let them in. And they’ve been with us ever since. There’s loyalty, and there is trust. They’re family members.”

In summer 2020, Spence traveled from his home in New Jersey to the Manhattan protest outside Bezos’ penthouse. “We really only talked for about two minutes,” Spence says of his first time meeting Smalls. Nonetheless, Spence was quickly added to an organizer chat group. He is now the ALU’s vice president of membership.

“One of the signs of a good organizer is believing fundamentally that working-class people are smart and capable,” Spence says. “So building an organization where you tried to make everybody have a part in the democratic process, let everybody have a role in it—that’s going to be a successful organization of working-class people.”

That’s the same ethos that drew in Cassio Mendoza at the October 2020 rally outside of Bezos’ Beverly Hills home.

A committed socialist and the son of a videographer with Unite Here Local 11, Mendoza was skeptical of staff-led organizing. He saw in Bryson and Palmer genuine rank-and-file leadership and was especially impressed that Palmer had flown to Los Angeles after finishing up a shift at Amazon. The Congress of Essential Workers “didn’t seem manufactured in any way,” Mendoza says.

A Los Angeles native, Mendoza typically wears a blue L.A. Dodgers hat, loose black T-shirts and beige khakis—wardrobe choices that match his understated personality. Despite his attempts to fade into the background, Mendoza became a pivotal campaign organizer. By June 2021, he had packed up and moved to New York. He began working at Amazon a month later, with the intention of helping the organizing effort.

But at that point, the labor fight was still solely about garnering more respect for workers, and the group mostly wanted to convene Amazon workers across the country for a national conference. “They didn’t even say the word ‘union,’” Mendoza remembers of those early conversations.

“The idea was to have us all come together under one banner,” Spence says.



Connor Spence

ILLUSTRATIONS BY ANNEE SCHWANK

As members of the Congress of Essential Workers began reaching out to other worker groups through social media, they learned that most didn't have a real organizing presence inside Amazon. One exception was Amazonians United, a loose network of worker committees in the United States and Canada. That group's organizing model is based on "solidarity unionism," in which workers begin acting like a union without any official, government recognition.

The organizers on Staten Island opted for a different approach when they formed the Amazon Labor Union, although members of Amazonians United have lent support to the union drive at LDJ5.

Bryson had been a member of multiple New York City unions, including the Service Employees International Union Locals 32BJ and 1199, and the American Federation of State, County and Municipal Employees District Council 37. And Smalls had once been a Teamster before working at Amazon, leaving what he describes as "a bad contract."

While the Congress of Essential Workers at first resisted the idea of a formal union, that changed after the Retail, Wholesale and Department Store Union (RWDSU) lost its campaign to unionize an Amazon warehouse in Bessemer, Ala., in April 2021. (As of press time, the outcome of the second election in Bessemer is still pending.) Put off by RWDSU's approach, which leaned on politicians and celebrities to gin up support among Amazon employees, Smalls and the other organizers thought they could do better.

"We know the ins and outs of the company," Smalls explains. "Derrick is a six-year vet. I worked there for almost five years. Who better to lead the fight than us?"

As they discussed the idea of a new, independent union to keep workers in the driver's seat, they looked for examples of other militant unions. Mendoza was especially inspired by William Z. Foster, a Communist organizer in the steel industry in the 1930s. Spence turned to *Labor Law for the Rank & Filer* from Daniel Gross and Staughton Lynd, and he distilled lessons from labor studies and copious online research into presentations for the organizing committee—including how to take on union-busting consultants on the shop floor. For language on inclusion, the group referenced Unite Here's national constitution. For union democracy structures—including how union officers' salaries should be pegged to the average wages of the union membership—they looked at the United Electrical Workers.



Jordan Flowers

ILLUSTRATIONS BY ANNEE SCHWANK

All of these ideas would be reflected in ALU's constitution.

“Let’s combine the union model with the rank-and-file committee model,” Spence recalls discussing with Smalls. “Each building has a worker committee that is the main decision-making body of the union.”

Ultimately, the group eschewed abstract theories and rigid methods and looked to workers to act.

“Screw it,” Spence recalls saying. “Let’s just go to JFK8, Chris’s old building, and organize workers there. It’s probably the best building to start a union campaign.”

THE DRIVING FORCE

It’s hard to overstate the odds stacked against an independent union taking on Amazon.

It’s not just that Amazon has a storied union-busting record. The company’s size and ubiquity make it an unavoidable part of modern American life, compunctions of conscience about the welfare of its workers aside. Amazon’s sprawling warehouse and logistics network delivers billions of boxes of stuff annually to its 153 million Amazon Prime members, with 40% of all online purchases in the country originating through Amazon, compared with just 7% at Walmart. More than 1.1 million people now work at Amazon’s more than 800 U.S. warehouses, and Amazon is projected to employ 1% of all U.S. workers in the next few years.

What’s more, employee turnover inside Amazon facilities is constant. Amazon’s annual churn rate—representing the number of employees leaving the company each year compared to their total number—is about 150%, which Bezos has said is by design to prevent what he called a “march to mediocrity.”

That high turnover made Amazon warehouse veterans, like Michelle Valentin Nieves (who’s been there three years), invaluable organizers. Inside the JFK8 warehouse at the height of the pandemic, Valentin Nieves was growing increasingly frustrated. Managers would reprimand her on the shop floor while she was risking a Covid infection.



Gerald Bryson

ILLUSTRATIONS BY ANNEE SCHWANK

In the first months of the pandemic, Valentin Nieves watched CNN for live updates on infections, hearing false reassurances from former President Donald Trump. “Then, come to find out, there were

people actually coming up with Covid-19 already in the facility. And they were trying to keep it a secret.”

As Valentin Nieves waited to get vaccinated in 2021, “I was just losing my mind,” she says. “I’m like, ‘I’m gonna get it. I’m gonna bring it back to the house. I’m gonna give it to my family.’”

When Palmer approached Valentin Nieves to sign a union card in 2021, she didn’t skip a beat. Valentin Nieves would go on to read Martin Jay Levitt’s *Confessions of a Union Buster* and become a fierce worker organizer, connecting especially with Latino workers for whom she was a familiar face.

Valentin Nieves, who is from Puerto Rico, says good organizing entails good listening, so she would take her time to hear workers’ grievances and provide feedback. During one of these chats, she talked with a worker who had foot spurs from standing for prolonged hours at Amazon. Eventually, Valentin Nieves helped the worker file multiple requests for medical accommodations until they finally got approved.

Brima Sylla, 55, a widely respected immigrant worker from Liberia with a doctorate in public policy, started working at Amazon in January 2022 and joined the union campaign in March. He had come to Amazon after 10 years of teaching at a small private school on Staten Island, which laid him off during the pandemic. He quickly grew tired of the ambulances blaring to the warehouse entrance to ferry an injured worker to the hospital. Nationwide, workers at Amazon suffered 27,700 injuries in 2020 and 38,300 in 2021. The company accounts for nearly half of all injuries in the warehouse industry— a rate of 6.8 per 100 workers.

Sylla says he organized to build the union to make Amazon a dignified workplace, because “the company just wants money, money, money. They forgot about the human side of the workers. The job is damn hard.”

Pasquale “Uncle Pat” Cioffi, a former longshore worker with the International Longshoremen’s Association for about nine years, had been reticent about supporting the union when he was first approached. He scolded organizers for making promises about wage hikes before even securing a contract.

But when he saw cops arrest Smalls, Daniels and Anthony for trespassing as they delivered food to workers in February, Cioffi changed his mind.

“At the end of the day, they were dropping off food,” Cioffi says.

Cioffi occasionally wears Nike tracksuits and a yellow Amazon vest adorned with pins and the words “Italian G.O.A.T.” emblazoned on the back. Like Smalls, he is a process assistant. When he speaks, he

jabs his fingers at your upper body to punctuate a point, evincing a self-confidence that enraptures listeners. Workers say he personally flipped hundreds to support the union.

“People tend to go with people that they trust,” Cioffi explains. “Everybody knows me from day shift, any shift, any department. They know who I am because I’m always making that extra effort to help them out in whatever the situation is.”

“Amazon didn’t make this about the ALU,” Cioffi adds. “They made it about Chris Smalls. But this wasn’t really about Chris Smalls. This was about the people.”

Karen Ponce, 26, is one of those people. She had started working at an Amazon delivery station in 2020, intending to save up money for a master’s degree in social work. After a layoff without warning, Ponce was rehired at JFK8.



Michelle Valentin Nieves

ILLUSTRATIONS BY ANNEE SCHWANK

Though she had been active in immigrant rights causes in college, Ponce says she didn't understand unions and initially bought into Amazon's anti-union propaganda. "I was brainwashed, even scared," Ponce says.

Her thinking began to shift after reaching out to her college sociology professor, who encouraged her to talk to the organizers. Connor Spence answered Ponce's list of questions about dues and the union election, and they talked about working conditions.

"They understood the toxic work environment because they were workers themselves," Ponce says.

As Ponce learned that some of her coworkers were living in their cars and homeless shelters, she began to connect the organizing drive to her social work calling. She began studying labor history and read Jane McAlevey's *A Collective Bargain*. Not only did Ponce eventually join the union effort, she became the ALU's secretary in December 2021.

Arlene Kingston, meanwhile, supported the union effort from the get-go. She grew up talking politics and had strong municipal unions in her native Trinidad and Tobago.

Kingston and another coworker aided the union effort by offering free food in the break room, cooking peas and rice, chicken and macaroni pie to give out. "And if we have to do it again, we're gonna do it again over and over," Kingston says.

She relishes how "a little person that you underestimated" defeated Amazon. "And that is just the beginning."

SOLIDARITY & INDEPENDENCE

The Amazon Labor Union had no time to waste after the victory at JFK8. As messages of support poured in from Amazon workers nationwide, the priority quickly shifted to the vote at the next warehouse, LDJ5, where roughly 1,500 workers sort packages for delivery to the New York City metro area.

Less than a month after voting wrapped up at the first facility, workers at the second facility began casting ballots. In a May 2 vote count conducted by the National Labor Relations Board (NLRB), the union came up short.

Compared to the first warehouse, relatively few of the ALU's key organizers work at LDJ5. That posed a tougher challenge for those who do, including Julian Mitchell-Israel, 22, who first sent Smalls his resume after reading an article about the ALU in the socialist magazine *Jacobin*.

Mitchell-Israel had been involved in electoral politics, including Independent Vermont Sen. Bernie Sanders' 2016 presidential bid, but says he learned a crucial lesson about organizing over the course of a high-stakes campaign at LDJ5.

“When you’re up against misinformation, when you’re up against people that are violently anti-union, you have the instinct to sort of get on the defensive, to go— ‘Screw you, you don’t understand you’re being brainwashed, whatever,’ ” Mitchell-Israel says. “When it comes to organizing, you have to be vigilantly kind. And it takes discipline. And it takes a sort of militancy and love. People need to have unlimited chances here.”



Julian Mitchell-Israel

ILLUSTRATIONS BY ANNEE SCHWANK

Madeline Wesley, another LDJ5 employee, arrived from Florida in August 2021. Wesley, 23, had been a student activist at Wesleyan University in Connecticut. It was there that Wesley met ALU's pro bono lawyer, Seth Goldstein, who was representing the university's physical plant workers and clerical workers. After stints working for Unite Here union locals in Boston and Miami, Wesley joined the Amazon campaign on Goldstein's urging and soon became ALU's treasurer.

After the upset victory at JFK8, "some of us thought that LDJ5 would be an easy win," said Wesley before the vote. "And what we realized was that we were absolutely wrong. Amazon is really angry at us for winning JFK8, they weren't expecting it at all. And now they're giving us everything they've got here at LDJ5."

Wesley says she and her fellow workers at LDJ5 faced a bruising campaign in which Amazon doubled down on its union-busting tactics. The company is also seeking to overturn the election results at JFK8 through an appeal to the NLRB.

On April 24, the day before voting began at LDJ5, national labor leaders rallied at Amazon's Staten Island campus in a bid to boost support.

The mood at the "Solidarity Sunday" rally was jubilant. Surrounded by Amazon workers and hundreds of their supporters, Bernie Sanders and Rep. Alexandria Ocasio-Cortez (D-N.Y.) also delivered fiery speeches.

Many union leaders pledged their full support of the ALU—including Mark Dimondstein, president of the 200,000-member American Postal Workers Union; Sara Nelson, president of the Association of Flight Attendants-CWA; and Randi Weingarten, president of the American Federation of Teachers. Earlier in April, Sean O'Brien, new president of the Teamsters, met with Smalls and Derrick Palmer, ALU vice president of organizing, in Washington, D.C.



Madeline Wesley

ILLUSTRATIONS BY ANNEE SCHWANK

“We work in the same industry as all of you—and we’re either going to rise together or we’re gonna fall together,” Dimondstein said at the rally.

Smalls welcomes the support but remains unequivocal about the union’s independence. “Everybody knows that we’re gonna remain independent,” Smalls said at the rally. “And these bigger unions know—every time I meet with one of their presidents, I let it be known—there ain’t no strings attached.”

With hopes of unionizing a second facility postponed for now, the ALU still has another momentous task before it: winning its first collective bargaining agreement with Amazon. If the new union can channel its broad national support and deep connections inside JFK8 into improved conditions at that warehouse, it will make a clear case to Amazon workers elsewhere that they should join up.

“There’s no way we’re going to stop or let this bring us down,” said ALU’s co-founder Derrick Palmer at an impromptu press conference following the May 2 loss. “It’s going to do the complete opposite. We’re going to go 10 times harder.”

LUIS FELIZ LEON is a staff writer and organizer at *Labor Notes*.

Have thoughts or reactions to this or any other piece that you'd like to share? [Send us a note with the Letter to the Editor form.](#)

Leader Mobilizer Activist Discussion Activity (Adapted from Jane McAlevey 2021)

Based on what's in the scenario only:

1. Who do you identify as the Leader who has moved people the most? Why?
2. Who is the mobilizer – actively working on the behalf of the union and carrying out actions that get others involved? Why?
3. Who is an activist – a pro-union supporter and may take action if asked? Why?
4. The BIG discussion - In what order should you be building relationships with your choices?

Scenario:

You work for a union representing a small school district that serves all grades from K-12 across three sites: an elementary school (K-6), a middle school (7-8) and a high school (8-12). The elementary and middle schools are located next to each other and the high school operates on its own site about 4 miles from the elementary and middle. Because of a budget shortfall that happened just before the last negotiations nearly three years ago, there were layoffs, class sizes grew, and the raises barely kept up with inflation. Members weren't happy with the contract settlement and there's been the most turnover of staff since that anyone can remember. The local has a new contract to negotiate starting four months from now. You have just been assigned to this local, and you are trying to figure out how to build a strong local before contract negotiations begin. You've just finished meeting with the former union president who left at the end of the last school year to return to university, and here is what you've learned from talking to her, and a couple others, about potential leaders and other workers who wield influence:

Tina Love is a second-grade teacher at the elementary school and has been at the school for seven (7) years. She is well liked and personable. She is always sharing and liking the state affiliate's posts on social media and seems to really like the union. She was recruited to the teaching profession by Teach for America and she still participates in this program as a mentor to incoming teachers who come from the same program. She knows A LOT of teachers through this effort and from the annual incoming cohorts of new teachers she helps mentor. She also regularly organizes well-attended happy hours with teachers from across the three different school sites in the district. She volunteers with a couple of local community organizations and regularly wears her union button on her jackets.

Destiny Jackson is a science teacher at the middle school and has been there for 10 years. Destiny never publicly supported the union, saying unions are for blue collar workers, not professionals. Once Janus passed, she dropped her membership. She was recently appointed by her principal to sit on the school site council with administrators and parents to discuss issues in the school. During a staff meeting Destiny asked that the position be elected and a majority of teachers voted for her to be on the council. Recently, her school's administration decided to change the school bell schedule to have an earlier start time for the next academic year without discussing the change at the school site council. Destiny worked with the parents on the council to hold a town hall meeting with the teachers and parents together to talk about the change and find out if most were in favor of the change. After a majority in the meeting

objected to the change, Destiny got them all to sign a letter objecting to it, and made a plan with others there to get a majority of all the teachers and parents. She then took the letter to the administration and they backed off of the change.

Paul Hammer works as a Math teacher at the high school. He is the most senior teacher and has been teaching at the high school for 14 years. He's always been a union member. He coaches the boys' basketball team. He received a Master Teacher evaluation rating from the school district several years ago and was named "Teacher of the Year" by management last year. Teachers go to Paul to get advice on how to navigate the evaluation system since he was able to achieve the seemingly unattainable rating of Master Teacher. When Destiny pulled together the meeting about the school bell and school start time, she asked Paul to get signatures in his school for the letter. Paul got all but two of the other teachers to sign. When the previous union president asked him to run for president, Paul declined, citing his busy schedule during basketball season, and leading community basketball leagues in his free time.

Ted Nailer works as a Math teacher at the middle school. He was a student teacher with Paul Hammer. He has only been there for four years and was also basketball player on Paul's team. Ted does whatever Paul asks of him as he sees Paul as his mentor in all things. Paul told Ted he needed to join the union to protect his job – and when Ted had been there for two years, he obediently became the building rep when Paul suggested it was a good way to be "in the know." Ted does a good job distributing union information and helps members get connected with the Union staff whenever they have a problem. When Paul asked Ted to run for President, Ted did it knowing that it would be easy to do as it was uncontested. He knows that the local will be bargaining this year, but he is good with spreadsheets and Paul said that the same people do the bargaining all the time. Ted is feeling good about his new role.

Jorge Rivera is the Art teacher at the high school. He's been there 4 years and the students really like him. His colleagues appreciate the fun energy he brings to the classroom and the school. He's always got a smile and something nice to say to people. Jorge is pro-union, and helped Paul get a few of the signatures when Paul was passing the letter about the school bell start time. He is always busy preparing for his own big art shows of his own work and thinks people should just be pro-union and says he can't be bothered with them if they aren't. He values his union membership because it has allowed him to be part of the statewide committee about arts instruction and this provides him with connections to other art teachers from across the state.

Things to Consider When You are Planning to Run a Campaign

Assessing Your Current Worksites:

1. How many people have been identified as trusted and respected by a number of people in the worksite/ local? (Leaders connect mobilizers into structures)
2. How many people are actively working in support of the union and have a group of folks that they influence? (Mobilizers get activists to show up and act)
3. How many people are ready to take pro-union action? (Activists see their relationship with the union as a participatory one)

Ladder of Engagement

Hahrie Han wrote that the Ladder of Engagement is “the difference between organizing events and organizing organizers” (2015).

When we’re bringing people into our unions we want to think about how we can constantly scale up our engagement from making them aware all the way up the ladder to planning the work of the union. Each step of the ladder allows more and more engagement and loyalty in the shared values and campaigns. It is this increased engagement that allows people to build their capacity to lead in more and more ways.

The most trusted and credible of union leaders are found at the top of the ladder. They are responsible for the continual recruitment of people to the ladder and the work of moving people up the ladder. Divvying up the important responsibility of recruitment and engagement building across leaders AND making it clear that their work is needed they’ll respond with their commitment to the Union. Ultimately, the Ladder of Engagement is about building leaders.

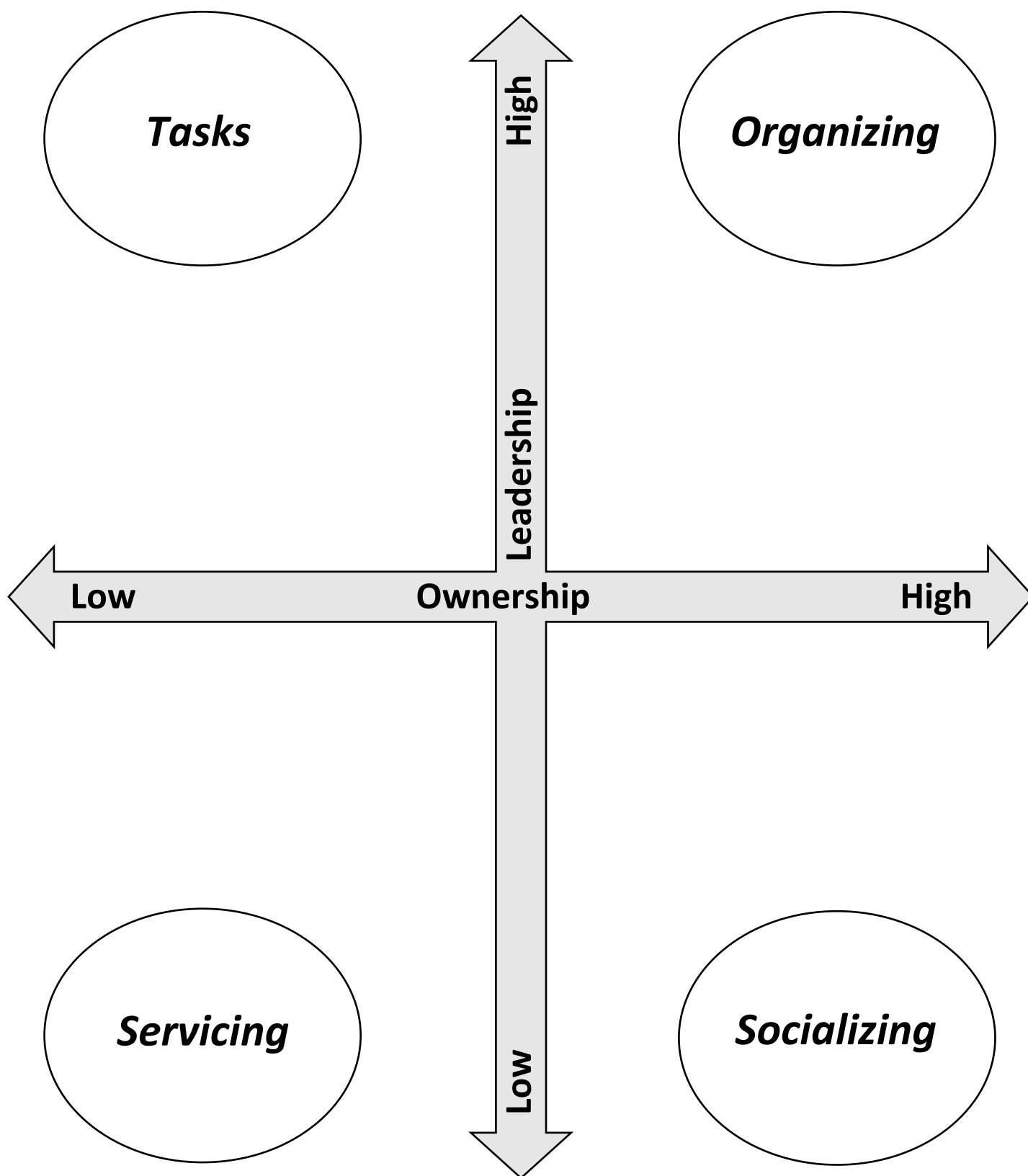
What are the kinds of invitations that are used at the various levels?

Note that the ladder reflects where the member/potential member is in their relationship/engagement with their union.

Planning	
Coaching	
Partnering	
Included	
Hooked	
Activated	
Intrigued	
Interested	
Aware	
Unaware	

Engagement – A Function of Ownership and Leadership

John Donaghy, Organizational Specialist, NEA





Transforming

Three Theories
Allies in the Work



NATIONAL
EDUCATION
ASSOCIATION

Three Theories of Change

Organizing, Mobilizing, and Advocacy

BY ELENI SCHIRMER

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

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

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



BRIAN STAUFFER

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

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

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

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

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

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

Eleni Schirmer reads, writes, and teaches about labor movements and education. She has a PhD in Educational Policy Studies from the University of Wisconsin–Madison.

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

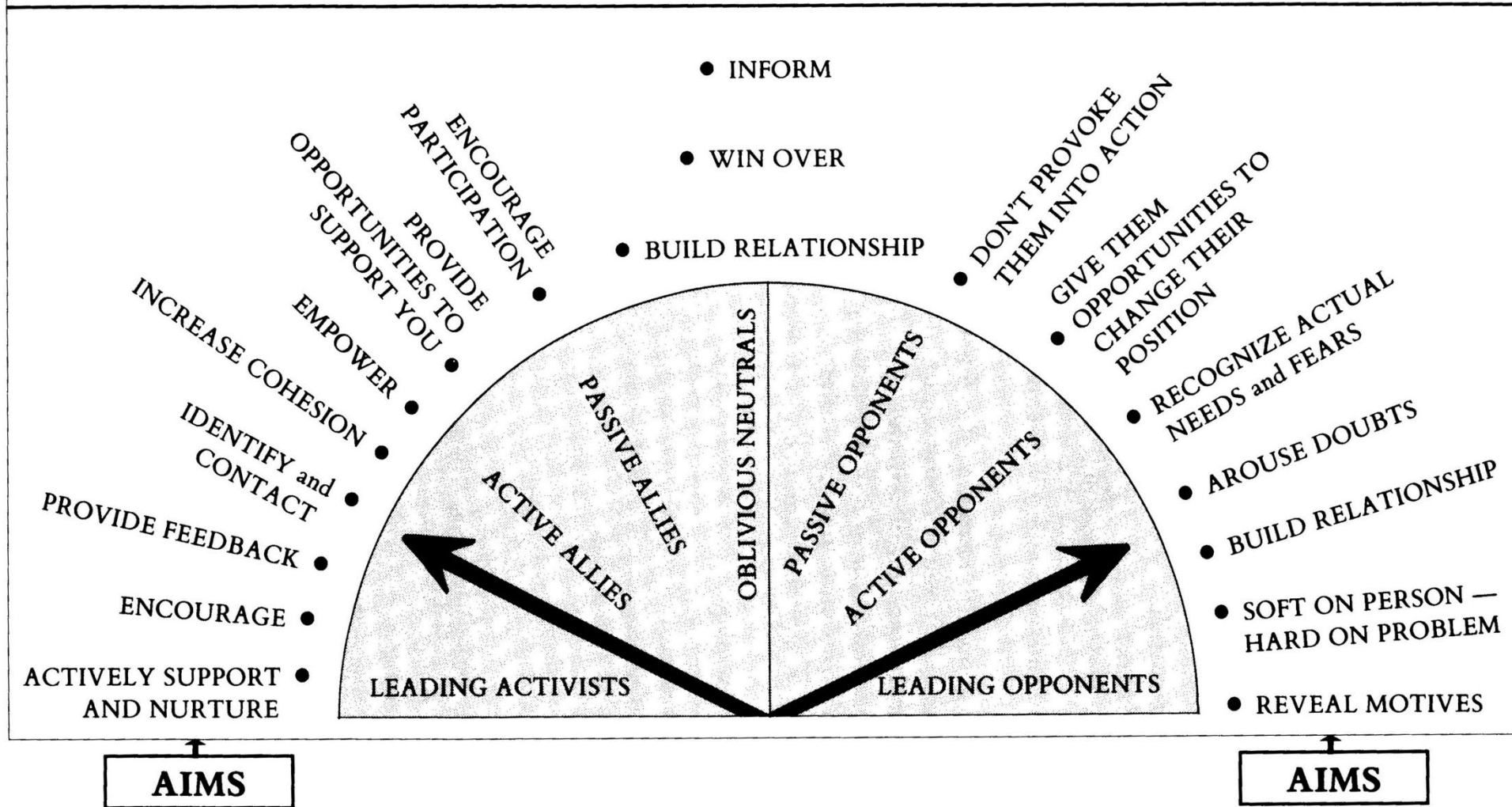
Reprinted with permission of Jane McAlevey from her book No Shortcuts: Organizing for Power in the New Gilded Age (Oxford University Press, reprint edition: April 1, 2018).

SOCIAL BAROMETER

* WHERE DO OTHERS STAND ON YOUR ISSUE? Identify Individuals and Groups

* WHAT ARE YOUR AIMS WITH EACH?

ARE YOUR TACTICS CONSISTENT WITH THESE AIMS?



I wish to acknowledge inspiration from David H. Albert: "People Power — Applying Non Violence Theory" New Society Publishers, Philadelphia, PA, 1985.

Worksheet: Spectrum of Allies Segments

1. **Active Allies:**

You believe you can already count on them to help you.

If your target falls in this area of the spectrum – you tactics will need to find ways to engage your allies even more actively in working with you toward your goal.

2. **Passive Allies:**

You think they have the same interest, investment or need to solve the problem as you do, and may be close to agreeing with you about your vision, but perhaps may not be able or willing to actively or overtly support you.

If your target falls in this area of the spectrum - your tactics will need to help move them to the “*active ally*” position; increasing their interest and willingness to be active.

3. **Neutral:**

These are people, organizations, institutions that may not know about the problem; may not know about you and your work; have no particular investment in the problem.

If your target falls in this area of the spectrum – your tactics will need to find ways to inform or educate them about the problem and your position in order to move them to a “*passive ally*” position. Examine your tactics to be sure you will not move them toward your opponent’s position.

4. **Passive Opponents:**

These are people, organizations, institutions that you think have some interests that would be opposed to your vision; they may have relationships with people who are actively opposed to you.

If your target falls in this area of the spectrum – your tactics will need to create doubt about their position, raise fears that their position may be “costly” to them in some way. You want your tactics to move them to a “neutral” position and NOT to an active opponent position.

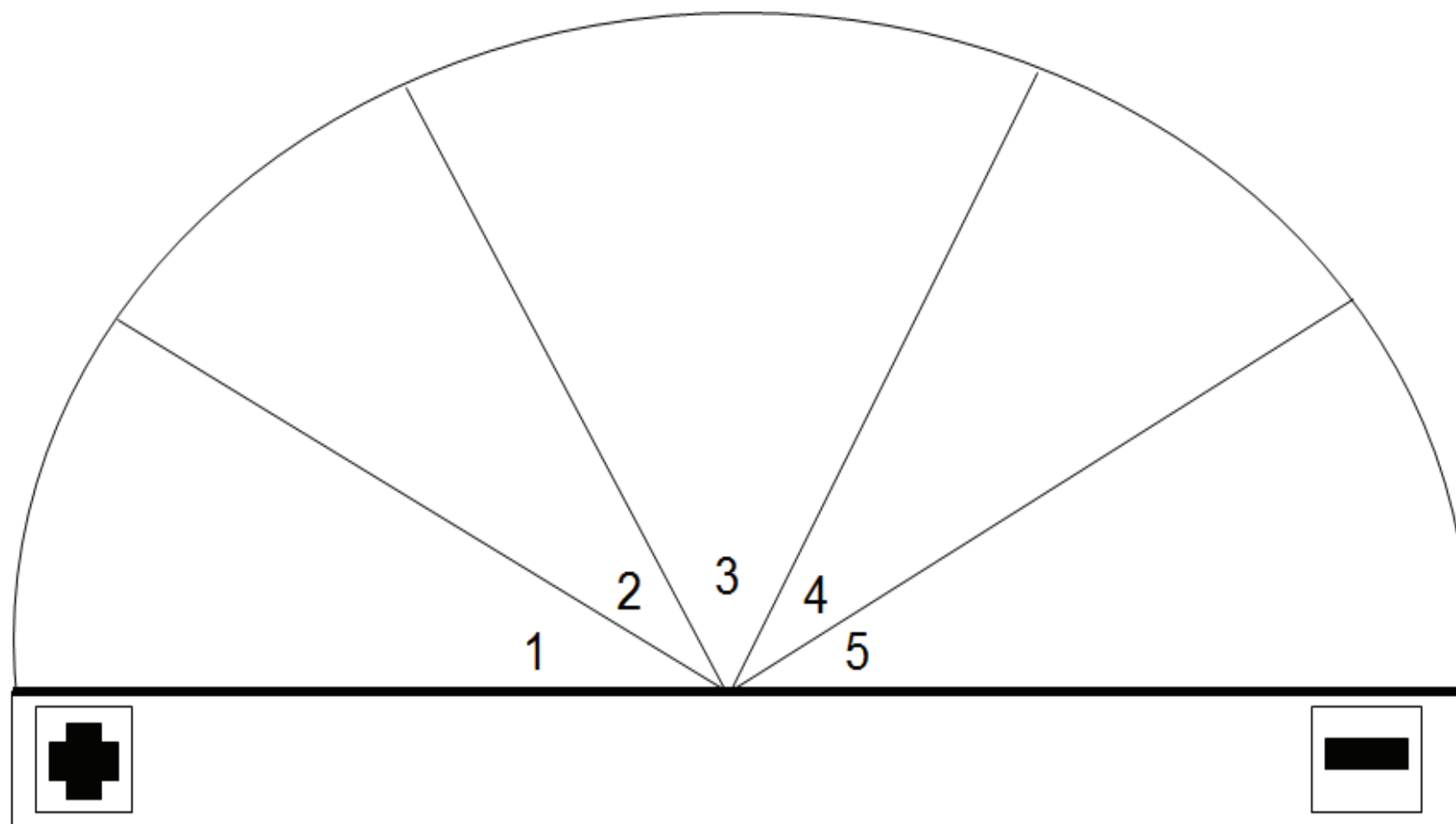
5. **Active Opponents:**

These are people, organizations, institutions that have a big investment in opposing your position (related to power, position, finances, relationships, etc.).

If your target is located in this area of the spectrum – your tactic goal would need to put them into a great dilemma, that any action they would take against you would be very “costly” to them. Your tactic goal would be to move them into a “*passive opponent*” position.



Problem Statement: _____



Source: Original Source – Training for Change (www.trainingforchange.org) and adapted into five segments by New Tactics in Human Rights.

New Tactics in Human Rights is a program of The Center for Victims of Torture

www.newtactics.org • www.cvt.org

Creative Commons: Attribution-Noncommercial 4.0 International License • <http://creativecommons.org/licenses/by-nc/4.0/>





Recruiting Leaders for the Work

Structuring Conversations
Types of Conversations
What to Listen For

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:

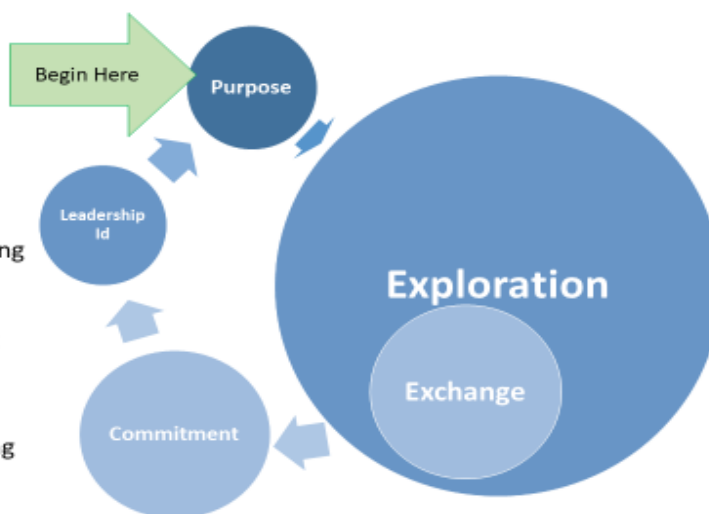
- They don't feel it is worth their time
- Atmosphere is disorganized and they don't feel they're receiving attention or direction
- No one explained why the work they are doing is important
- They are uncomfortable doing what they have been asked to do
- They feel overwhelmed by tasks and goals
- The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

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 Rank and File 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?

VOICE / Industrial Areas Foundation Individual Meeting Outline

Opening:

- Credentials (who suggested that you meet)
- Part of a larger effort to get to know leaders/ potential leaders at the church / synagogue / mosque / institution / community.

Introduce Yourself:

- Brief introduction of yourself and key turning points for you (where grew up, what you care about, why live here now, why joined your institution, what your goals are for your institution, your role in that)

Middle: Focus on the other person:

- Look for the personal underpinning of person's public life. Key stories. Why questions. What experiences shaped them-compel them to lead & make change?
- Listen for pivotal experiences, relationships and interests in their lives.
- Ask how different events shaped them as a person and as a leader.
- Ask how/what role their interests and activities play in their lives (studies, family, religious observance, work, play, etc.)
- Does the person have a following? If so, where and who do they lead? How have they acted to make change-organized to change an injustice and/or to change their institution /community?
- What type of relationships do they have with other leaders/ institutions?
- What do they want for themselves/the people they care about? How do they want to develop themselves?
- Share stories about yourself and talk about how *your* leadership has been shaped by the key events in your life.

End:

- What might you challenge the person to act on based on his/her own self interest?
- Referrals-what other leaders do they think you should meet with? Why?
- Possible organizing next step. Call other leaders to credential you? Bring leaders together to discuss key issue? Come to a training? Meet with another leader from your institution, etc.

Evaluate/Reflect:

- Is this person a leader/ potential leader? If so what would be a good place for them to lead based on their self-interest(s)?
- What did you learn about the person's self-interest?
- How might this overlap with the goals/ activities of your organization?

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

The Intersection of Our Core Values and Union Values

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

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

<i>Your Personal Core Values</i>

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

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

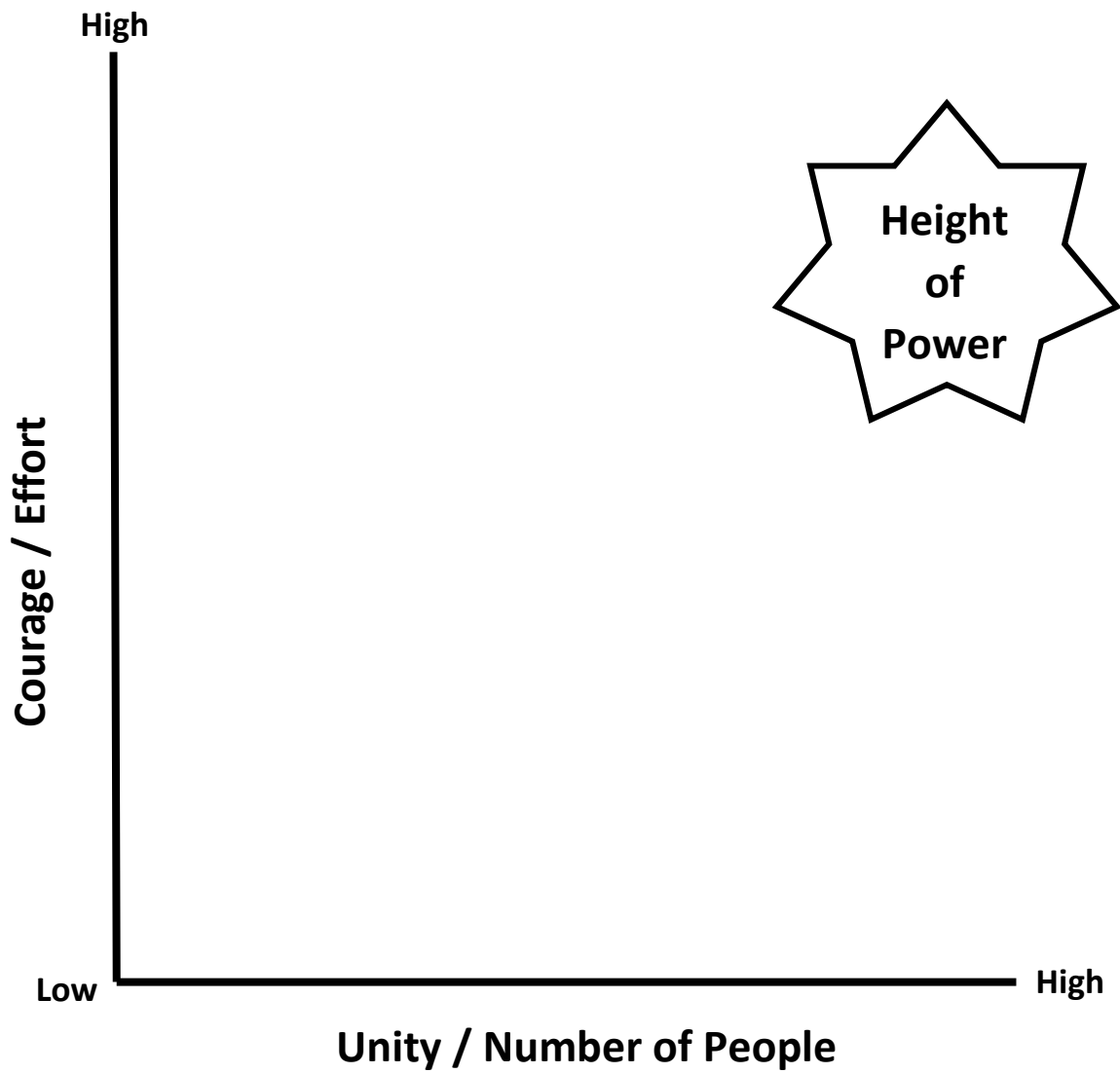


Campaign Planning

Campaign Mountain
Issues
Targets
Demands
Tactics



Power as a Function of Unity and Courage



The Forge

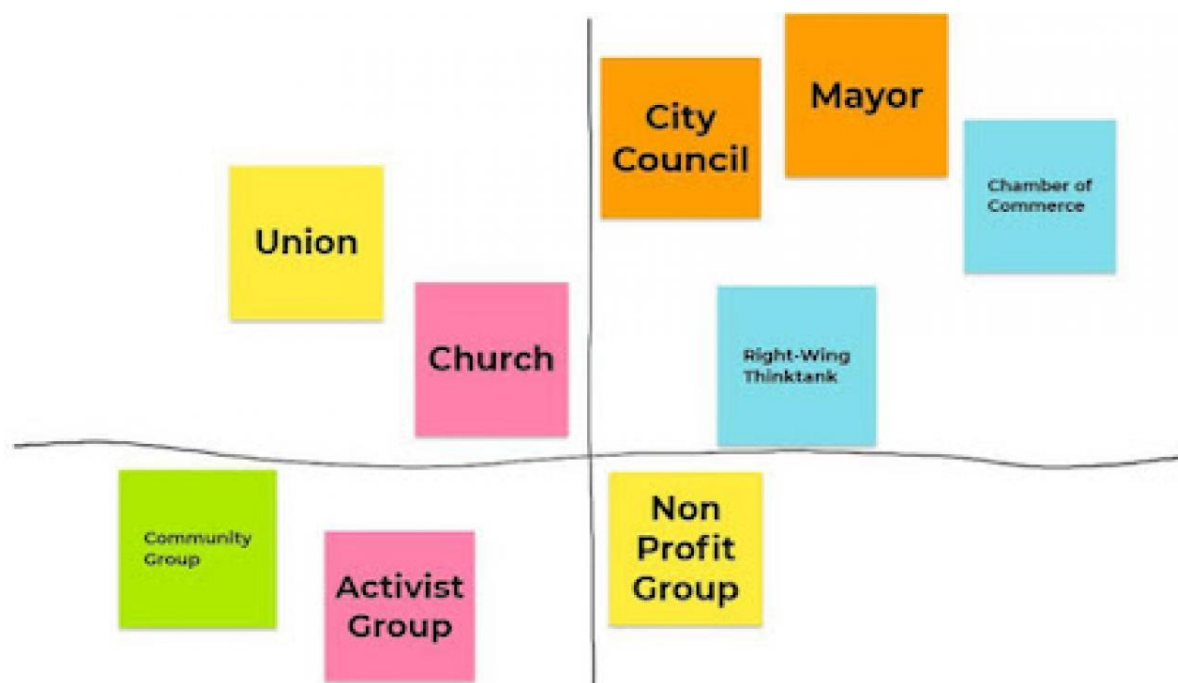


Image courtesy of the author

April 12, 2022

Strategy Charts & Power Maps: A User Guide

Eric Dirnbach

Why Do Campaign Strategic Planning?

If your group is brainstorming a campaign to change a public policy or to stop a harmful corporate action, it can often seem overwhelming. Where do you start? For example, a community group wants to stop the development of a luxury condo and have affordable housing instead. Another organization wants to shift funding away from the police budget to social services. Or a coalition wants the state to increase its renewable energy goals. So many factors are involved. What do we do and in what

order? Who are our allies and opponents? Who are the decision makers we have to push? How can we win, and how long will it take?

Campaign strategic planning will help answer these questions. Strategic planning forces a group to take the time to think through the campaign, rather than just launch into activities that group members are familiar with. For instance, without going through a strategy process, a group might decide that they should go hand out flyers about their issue. Maybe they should, but tactics should support strategies, which should support goals. Jumping right to familiar tactics may lead the group to waste time and energy or miss other actions that would be more useful to the campaign. Campaigns can be lost or fizzle out if they are run in an improvised manner and are insufficiently planned. If a campaign might take a year, then it's worth taking a week to carefully think through the strategy and revisit the plan regularly.

Here I move through a process for strategic planning using a series of tools. This list is by no means exhaustive, but includes the strategy guides I've used or heard about. I'll briefly mention some others along the way. I rely mostly on the general framework of the [Midwest Academy](#), some of the tools collected by [Beautiful Trouble](#), and ideas of power and organizing from labor strategist [Jane McAlevey](#).

Some Key Terms

Because words like “strategy” are thrown around in these kinds of discussions, and they often mean different things to people, I'll try to be clear about how I'm using them here.

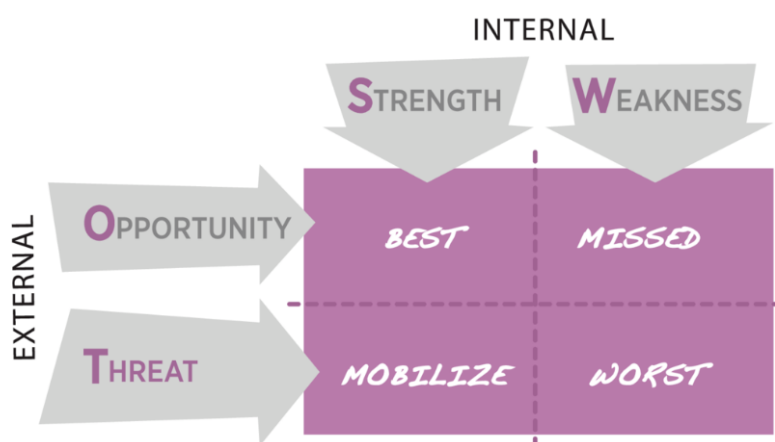
- Goals — the objectives of the campaign, the solution to an Issue
- Issue — the problem to be solved

- Campaign — the set of Strategies to achieve the Goal
- Strategies — plans designed to build Power to move a Target
- Tactics — a set of actions designed to implement a Strategy
- Power — the ability to get what you want from a Target
- Constituents — groups or people who would directly benefit from a Campaign win
- Allies — groups or people who support your Goals
- Opponents — groups or people who oppose your Goals
- Targets — people who can make your Goals happen

Strategic Planning

Here are several frameworks that groups can use to determine their campaign goals and strategies.

SWOT Analysis



This is the classic Strength, Weaknesses, Opportunities, and Threats matrix — SWOT. Often used in the business world, this can also be a useful exercise to help groups clarify their campaign goals — what issues they can win.

The group identifies its own internal strengths and weaknesses while also listing what external threats and opportunities they face. The diagram shown here goes further by looking at what campaign ideas can be generated at the intersection of these categories.

So in this case, all the strengths, weaknesses, opportunities and threats would be listed in the areas where the arrows are. Where these intersect on the chart, you can identify what Beautiful Trouble calls “Best Case,” “Missed Opportunity,” “Mobilization Scenario,” and “Worst Case” campaign options.

From this, the group can identify what issue it is well positioned to possibly win — those that fall in the Best Case box. For example, a Best Case scenario could be when a neighborhood group that’s very active and well known in the area (strength) sees widespread interest in doing something about a large vacant lot that’s been sitting there for years (opportunity). This leads them to take on a campaign to create a community park.

They can then move to the strategy chart to fill in details about the campaign.

Strategy Chart

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics
1. List the long-term objectives of your campaign. 2. State the intermediate goals for this issue campaign. What constitutes victory? <i>How will the campaign</i> • Win concrete improvement in people's lives? • Give people a sense of their own power? • Alter the relations of power? 3. What short-term or partial victories can you win as steps toward your long-term goal?	1. List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, canvass, etc. What is the budget, including in-kind contributions, for this campaign? 2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each: • Expand leadership group • Increase experience of existing leadership • Build membership base • Expand into new constituencies • Raise more money 3. List internal problems that have to be considered if the campaign is to succeed.	1. Who cares about this issue enough to join in or help the organization? • Whose problem is it? • What do they gain if they win? • What risks are they taking? • What power do they have over the target? • Into what groups are they organized? 2. Who are your opponents? • What will your victory cost them? • What will they do/spend to oppose you? • How strong are they? • How are they organized?	1. Primary Targets A target is always a person. It is never an institution or elected body. • Who has the power to give you what you want? • What power do you have over them? 2. Secondary Targets • Who has power over the people with the power to give you what you want? • What power do you have over them?	For each target, list the tactics that each constituent group can best use to make its power felt. Tactics must be • In context. • Flexible and creative. • Directed at a specific target. • Make sense to the membership. • Be backed up by a specific form of power. Tactics include • Media events • Actions for information and demands • Public hearings • Strikes • Voter registration and voter education • Lawsuits • Accountability sessions • Elections • Negotiations

This is the well-known strategy chart from Midwest Academy, a progressive training institute that has worked with activists for 50 years. What I like about this chart is it requires that the group to think carefully about its goals, what resources it brings to the campaign, its constituents, allies and opponents, its campaign targets, and tactics for every target.

For Midwest Academy, all goals should be something concrete that can be won from a target, and they should deal with a specific solution to a problem that the group is trying to fix. This should be something that the group really wants, not a “realistic compromise.”

In this framework, each target is a person who can make a decision to give you what you want and needs a separate strategy to move them. In its [Organizing for Social Change](#) guide, Midwest Academy says that a strategy is “a method of gaining enough power to make a government or corporate official do something in the public’s interest that he or she does not otherwise wish to do.” Thus strategies must always involve building power to get a target to do something.

All the [tactics should support that strategy](#), and we shouldn’t use tactics over and over again if they aren’t working just [because we like them](#). There are a few tools related to tactics that might be useful.

The **Action Star** asks us to carefully think through our actions, which are the tactics we deploy. Furthermore, each action works at a specific **Point of Intervention**, interrupting the functioning of the system.

It's also important to have small wins on the way to the main goal in order to build the confidence, energy, and support of the campaign. This is related to the theory of **campaign escalation**. If a campaign continuously does the same thing month after month, it may fizzle out as people drop away. We want an escalation of activity and power over time.

Other exercises examine targets. A tool for target identification is the **Pillars of Power**, where you identify the key institutions or relationships that your main target depends upon. You may want to develop a strategy for some or all of these. The **Peel the Onion** tool helps better understand targets through identifying their wants and needs.

At the end of the chart process, the group makes a campaign timeline, which is a living document that includes a specific and concrete list of items: WHO will do WHAT by WHEN. The more specific the assignments, the better. Something like a **Gantt Chart** can be useful to map out all campaign elements on a timeline.

SMART Objectives



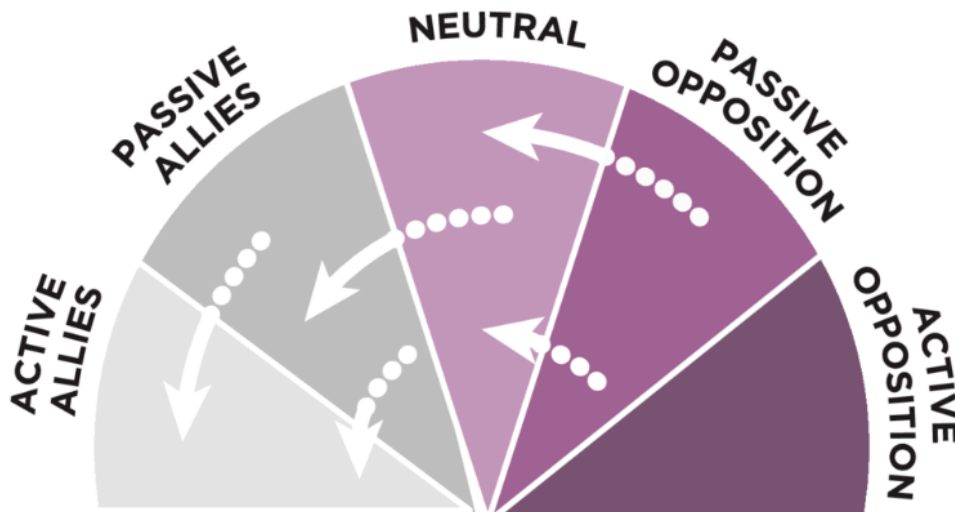
The SMART Objectives framework can be helpful for correctly outlining the key strategies for the campaign. There are **various versions** where the letters stand for slightly different concepts. Each objective should be:

- Specific — A simple and exact definition of what you want to happen
- Measurable — What information are we tracking to know if we are succeeding?
- Achievable — We should choose strategies that we can actually accomplish.
- Relevant — Does this really help the group get to its goal?
- Time-Bound — Set appropriate deadlines to keep the campaign moving.

Power Analysis

These are tools that help groups assess the landscape of support and opposition in their campaigns and are useful to fill out the Constituents, Allies & Opponents part of the strategy chart.

Spectrum of Allies



In this framework, you identify important groups or people that support, are neutral, or oppose your goal and display them visually on a spectrum, from left to right.

To win, it may be necessary to move some of the groups toward the more supportive side of the spectrum. Moving passive allies to active allies could be key for winning the campaign. Moving passive opponents to neutral could be helpful. The campaign can develop strategies and tactics to accomplish that.

An important insight about active opponents is that we list them not because we want to convince them to support our campaign, since they probably never will. Instead, we should consider what they might do to oppose our campaign so that we can figure out how we would respond. Also active opponents generally aren't targets, because they can't give us what we want. So spending a lot of time on them diverts energy from the campaign.

Power Maps



This goes into more detail about allies and opponents. You map both groups in a way that shows how influential they are. Use a two dimensional grid with the horizontal axis a similar Agree/Disagree as the Spectrum of Allies. The vertical axis is the Degree of Influence, with more powerful on the top and less powerful on the bottom.

This requires some honesty about the level of power for groups, especially allies. We should assess them for how they are, not how we want them to be. You can also connect the groups with arrows showing who can influence whom.

The level of influence axis can be useful to inform strategy. It may be good for the campaign to move a powerful neutral toward support since we want to use their power in our coalition. It may be less useful to deploy in certain ways a solid supportive group that has no power.

What About Worker Organizing Campaigns?

Worker organizing, whether to improve conditions at work or to form an officially recognized union and negotiate a contract, can fit into this overall framework.

In this case, the campaign could be conceptually simple since there is often one obvious target — the boss. The workers need a strategy to move the boss to agree to their demands. This strategy can involve a series of **escalating job actions** that organize more coworkers to increase their collective power and could eventually include a strike.

In more complicated versions, we may also need to bring pressure on the boss in other ways, especially if they engage in union-busting activities. A broader “**corporate campaign**” often identifies other targets that have key business relationships with the employer. This is not a substitute for worker action but should be used alongside it.

A common framework in the labor movement is to ask and answer these four questions:

- How does the employer make money?
- How does the employer want to grow in the future?
- Who are the decision makers?
- What are the important business relationships?

The strategy and tactics should try to disrupt the ability of the employer to make money or grow the business, and sever or complicate their important business relationships. A classic and successful example of a corporate campaign would be the **United Farm Workers national grape boycott**. It reduced grape sales and disrupted the grape growers’ relationships with grocery stores significantly. The campaign put enough pressure on the growers to lead to union recognition and a contract. This is perhaps a rare example of a boycott that worked because the UFW put tremendous resources into it and attracted significant solidarity and support nationwide.

The [Labor Notes](#) Secrets of a Successful Organizer and TroubleMaker's Handbook are great resources for labor organizing campaigns.

Campaigns Must Build the Power of Disruption

What I like about this overall framework is that it's hard-headed and realistic about building power and winning. It correctly assumes that we live in an unjust world that primarily serves the interests of wealthy and powerful people. The vast majority of people only get what they can successfully fight for, usually through social movements.

Winning our campaigns requires more than asking nicely and “speaking truth to power.” It's not enough to just “fight the good fight” and not adequate to just have a rally because “we need to do something.” Our goal shouldn't be just “educating the public” or “changing the conversation.” We won't win just because we think we are right. We won't win just because we have been running a campaign for years and think we deserve to win.

Moreover, campaigns are not simply about the specific solution to a problem; they should also be about building people's power for the next fight. For Midwest Academy, campaign goals should fit three major criteria: (1) win real improvements in people's lives, (2) give people a sense of their own power, and (3) alter the relations of power. A campaign that builds power sets the group up for the next campaign in a stronger position. As Midwest Academy's [Organizing for Social Change](#) reminds us, “an organization should come out of any campaign stronger than when it went in, even if it loses the issue.”

So we want to win actual victories, which requires building power. But what exactly is this power? And how much is enough? Our power requires organizing people to **disrupt normal business as usual** to pressure decision makers to do something we want. When the pressure we apply is greater than the reluctance of the decision makers, then they will move. Political Scientist Francis Fox Piven has long written about the dynamic of **social movement disruption** leading to reforms — that “if a movement succeeds in building a constituency, communicating its issues, and creating sufficient disruption to be a threat, it will create a dynamic in the legislature where politicians start to respond to the movement in order to bring things back to normal.” Moreover, this disruptive power means going beyond rallies and other symbolic demonstrations. Rallies by themselves aren’t disruptive — they may express anger and signal the potential for disruption — but if all we do is rallies, we won’t win because we haven’t disrupted business as usual.

Labor strategist Jane McAlevey, in her book **No Shortcuts**, makes this more concrete with the theory of concession costs and disruption costs. Concession costs are how much it will cost the target to give you what you want. Disruption costs are how much pressure a campaign can create, and this needs to be of the same magnitude as the concession costs. McAlevey fills in what I think is missing from the Midwest Academy framework, which is the question about how much disruption will be required. She argues, “Movement actors can and must reasonably predict the concession costs in advance; otherwise, they enter the fight without knowing which strategies to deploy.” This is why a campaign with only rallies rarely works. We are bringing low disruption costs that do not meet the higher concession costs.

So how do we disrupt for real? For an employer, a union disrupting their business through a strike or boycott could be effective. For a landlord, a tenants’ union disrupting rent payments could work. In both cases we are

disrupting by cutting off the money. These are conceptually easy cases because both involve what McAlevey calls bounded constituencies. This is a group of folks directly subject to an authority figure, but who have potential power over that person if they organize and act collectively.

This gets somewhat more complicated in community organizing. A community could also be considered a bounded constituency that could build potential power over a local decision maker. Often a community group identifies the need for more public funding for something or a change in the law. Thus the group often targets elected officials who have decision-making power over these issues. The disruption in this case could become disrupting the careers of uncooperative elected officials by the threat that they will be voted out. Or it could be disrupting the normal life of the community in order to create a crisis to which elected officials must respond.

So in the example of the vacant lot, local groups could try to pressure the mayor or city council to create a community park. Or they could attempt to occupy the lot, build the park themselves, and then defend it from being seized. They have created a crisis that could be solved through legalizing the park. Likely **both electoral and non-electoral strategies** will be necessary.

McAlevey cautions that campaigns often really do mobilizing rather than actual organizing. These words are often conflated but there is a **crucial distinction**. For McAlevey, mobilizing involves gathering up activists and organization leaders who are already interested in the issue. These are folks who will more naturally turn out for events, and it's tempting for campaigns to rely on them alone. But real power is built through organizing, when we talk with, recruit, and train large numbers of new people who may never describe themselves as activists. Especially important are those people who are unacknowledged, respected leaders

without official positions or titles who have influence and relationships with others.

Do These Tools Work in the Real World?

Most organizers and campaigners I have talked with use some version or combination of these ideas, but rarely do they work through everything outlined here. I don't think I ever have on any campaign I've worked on. That's certainly ok, since the main purpose of these exercises is really to get groups to ask these questions and think carefully about their strategies. And most importantly, we have to ask ourselves, are we building enough power to create enough disruption?

Moreover, these frameworks are necessarily simplified reflections of what actually happens in the real world. For example, the Power Mapping chart is useful, but it leaves out a whole third dimension, which would be how much a particular group will actually do regarding your campaign. We may have an influential group that strongly agrees with the campaign but can't really focus on it and only signs a support petition. Every other tool can also become more complicated when it encounters the real world.

I would be interested to see research on how often groups win their campaigns when they follow this or similar strategic planning processes. If anyone knows of this kind of research, please let me know. Also if anyone has comments on how helpful these tools are, or uses alternatives, please let me know!

Campaign Assessment Tool: After Action Review

Widely Felt	We thought the issue would resonate, but it didn't.	The issue resonated with some workers.	The issue resonated with a majority of workers.	The issue resonated with a strong majority of workers.
Deeply Felt	The issue did not feel urgent to the workers.	Some workers felt urgency, but most would not engage in any but the least demanding tactics.	A strong majority of workers were motivated to take at least one action, but we lost steam as we escalated.	A strong majority were willing to take multiple escalating actions in order to win.
Winnable	We did not identify a winning strategy (or the issue turned out to be winnable without collective action).	We identified a strategy that led to a partial victory.	We identified a strategy that led to victory.	We identified a strategy that led to a victory even beyond what we had expected.
Builds the union and builds leaders	We are not any stronger as a result of this issue fight, and may even be weaker.	Some leaders engaged with the campaign, including a handful new to the cause. The union's reputation and credibility was not significantly enhanced.	Most leaders in the relevant constituency group for the action engaged with the campaign, including ones new to the cause. The union's reputation and credibility increased as a result of the issue fight.	Most leaders in the relevant constituency group for the action participated robustly in the effort, including ones new to the cause. The union's reputation and credibility increased significantly as a result of the issue fight.

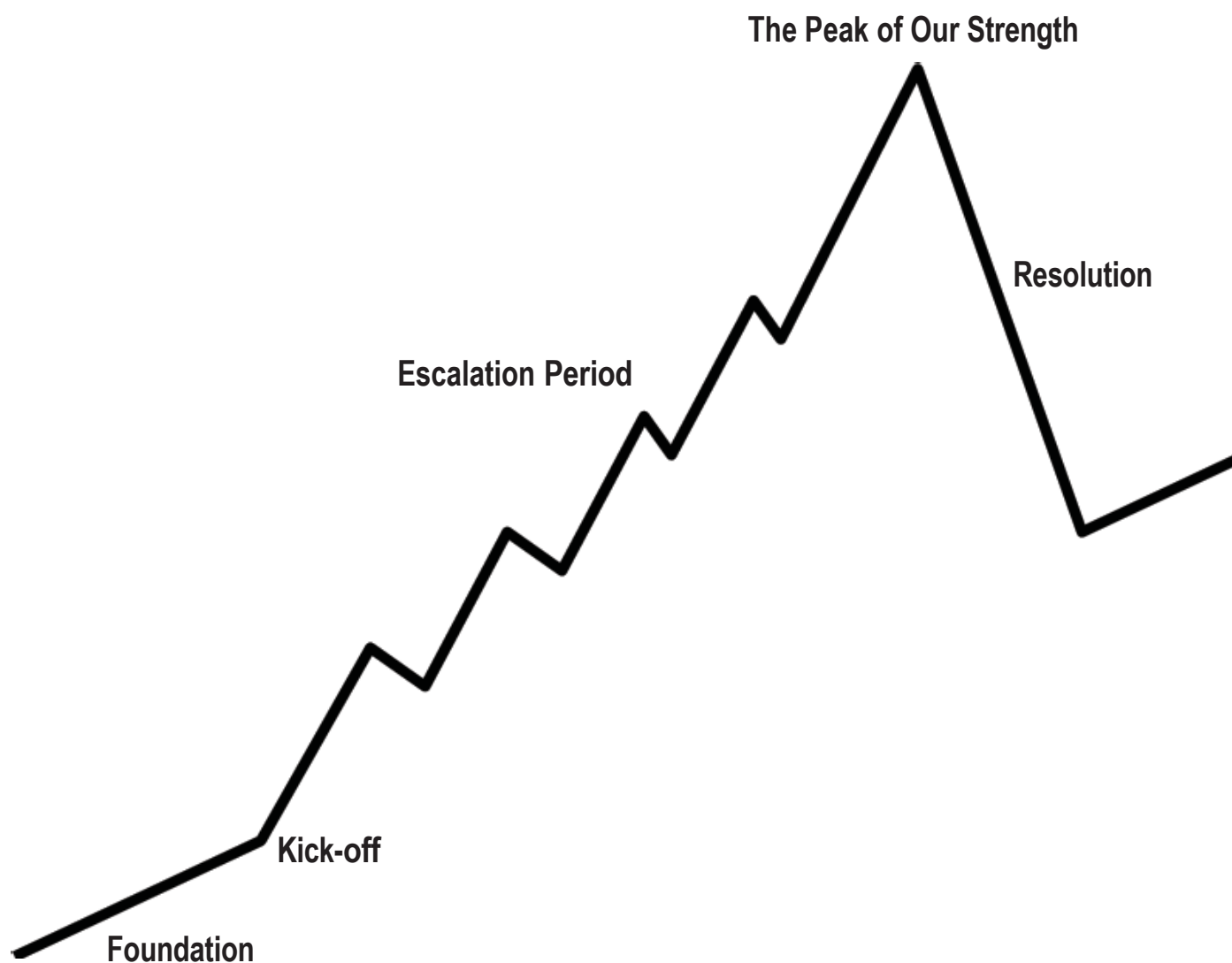
1. How did the framing of the issue serve to engage workers in the fight? How could we have altered the framing, or even the goals, to engage more workers, more effectively?

2. What tactics engaged the workers most effectively in confronting the target? What other tactics might have worked even better?

3. Where do we go from here with the level of engagement of leaders?

CAMPAIGN MOUNTAIN

Phases of a Campaign



MAKE A GAME PLAN

Once you've identified a good organizing issue, you need a plan of action.

THE THREE BASICS OF A PLAN

1. **What exactly do you want?** It's amazing how far along folks can be in a campaign without having identified what solution they're after, and whether or not it's winnable.
2. **Who has the power to fix the problem?** It's not enough to say "management." Figure out which person in management could say yes to your solution.
3. **Which tactics can work?** Aim your actions to build the pressure on the decision-maker you've identified. Consider how much pressure it will take to win, and where your leverage is.



Draft your Demand - What is the win that we want?

What is our demand? How will we know if we've won or not (it needs to be something we can see or touch that makes our lives better)? Remember – it's concrete. The win of this demand will result in visible, significant change in your constituent's daily lives.

1. Is it concrete (measurable)?
2. Does it make a visible impact in people's lives (meaningful)?
3. Does it leverage YOUR resources creatively and make for a good story (motivational)?
4. Must you organize and distribute leadership in order to accomplish?

Ex. LEA wants to secure a fully funded budget by demanding a 1-penny increase in the property tax formula by April 1st 2018.

Our Demand – Our Win is...

Identify the Target – Who can give you what you want?

Who is the target of your campaign efforts? A target has a name, a face, and an address. Who has the power to prevent you from getting your demand?

Our Target – Has the power to give us...



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.

- **Has a connection to students and the public.** If the issue affects students, parents and community, it grows your potential group of activists and the potential support.

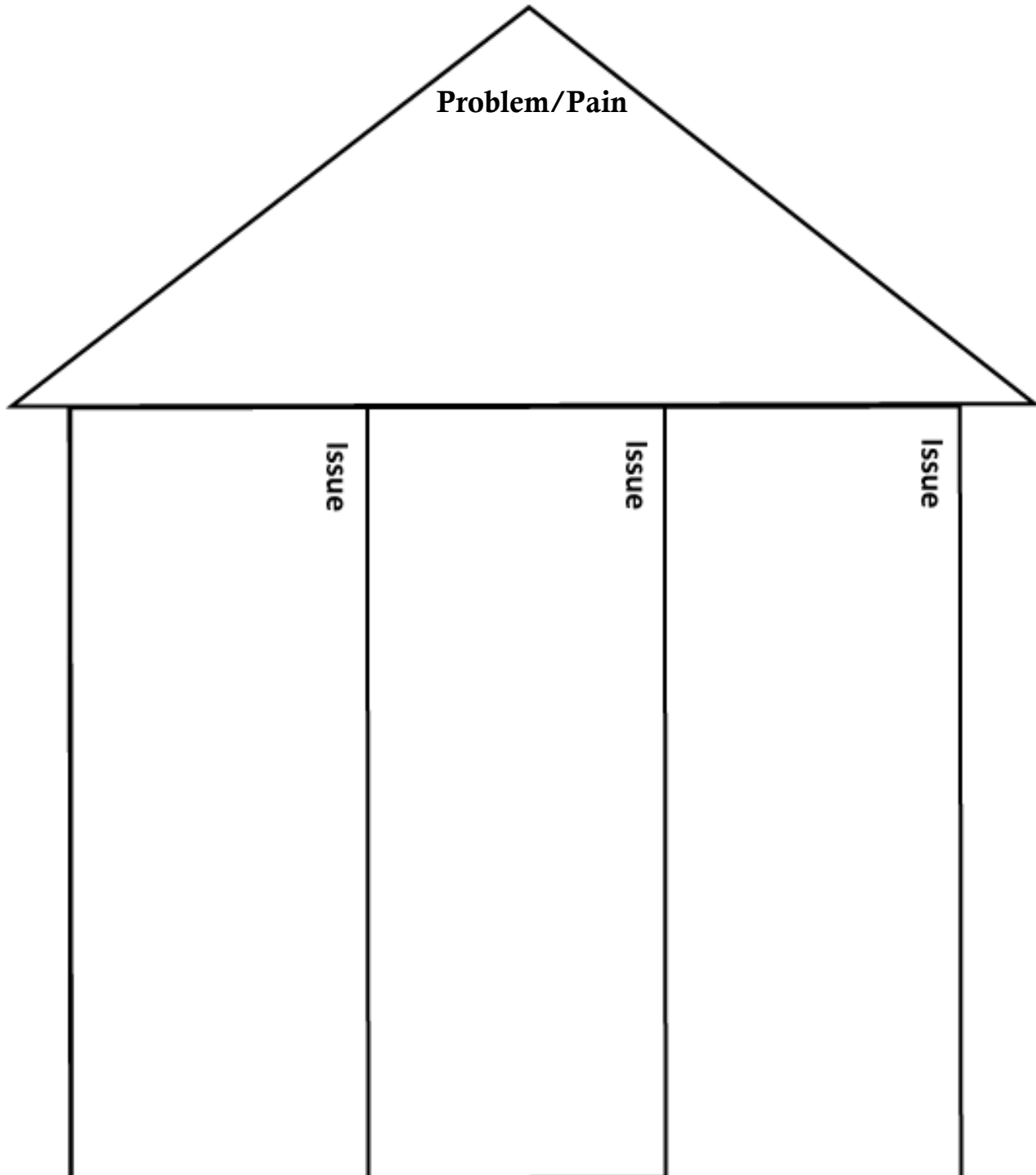


Problems vs. Issues:

Problems are statements of the world as it is. **“There is no respect for educators in this building.”**

Issues are a diagnosis of the problem that almost indicates what the solution is. **“There are no recognized structures in this building that allow educators to be part of decision making.”**

Take some time to first brainstorm the pain and/or problems our people are feeling. Then work to identify the issues within that problem that are causing the pain. Asking, “why do you think this is the way it is?” can move you into an analysis of issues that make up the problem.



Issue Criteria Check List:

Score each Issue from 1 to 3 (1 = No, 2 = Unsure, 3 = Yes) on the specific criteria then total your scores and compare with your team.

Will the Issue...	Issue #1	Issue #2	Issue #3
1. Result in a real improvement in people's lives?			
2. Give people a sense of their own power?			
3. Alter the relations of power?			
4. Be worthwhile?			
5. Be winnable?			
6. Be widely felt?			
7. Be deeply felt?			
8. Be easy to understand?			
9. Have a clear target?			
10. Have a clear timeframe that works for you?			
11. Be non-divisive?			
12. Build leadership?			
13. Set your organization up for the next campaign?			
14. Increase membership?			
15. Be consistent with your values and vision?			
16.			
TOTALS			

© Midwest Academy

28 E. Jackson Blvd. #605, Chicago, IL 60605

(312) 427-2304 mwacademy1@aol.com www.midwestacademy.com



CHECKLIST: CHOOSE TACTICS THAT FIT

Your escalating campaign is made up of many tactics. A tactic could be mild, like a survey, or militant, like a work slowdown. It could be traditional, like a picket, or it could be a creative stunt a member just dreamed up. When your group is weighing what tactic to try next, here are some factors to consider:

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



DEMANDS

TARGET

PRESSURE
POINTS

ALLIES &
ASSETS

Short

Mid

Long

Page 171

