

Foundations for Winning Campaigns

Day 2

Community Agreements pg 2-3

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

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

TODAY'S OUTCOMES



Analyze campaigns and identify what is likely to bring success and cause challenge to build better campaign plans

Explore and apply the skills for developing strong issue campaign leadership teams

Feedback on Feedback



Katie and Zac

What is the difference between coaching, mentoring, and training?

Reminder...

Who are leaders?

Leaders are those who take responsibility for enabling others to achieve purpose in the face of uncertainty

How do we enable?

- › Remove barriers to the use of agency- ability to choose to act- we do this by asking what they think they can do to overcome the barriers (coach)
- › When we direct action (teach) –this is OUR agency.
- › When someone defines their goal and uses THEIR agency to move towards it – that builds confidence, power, skills, and trust. We can support the use of agency through good coaching.
- › WE BUILD LEADERS WHEN WE COACH

What do you notice about coaching?

Why is coaching critical to a winning campaign? Page 125



- › Coaching is a direct intervention in an individual or team's work process to help them improve effectiveness.
- › Coaching enables others to build their own capacity to act.
- › Coaching moves leaders from a relationship where staff have an external control to one where they focus on how to grow

Page 127-131

Effective Coaching Is	Effective Coaching Is Not
- Showing up and being present to another person's experience and listening, with both your head and heart	- Being so prepared that you figure out all the answers for the coachee before you even hear or observe their challenges
- Helping the coachee explore and make sense of their challenges and successes and what they learned from it all	- to hurt their feelings or only focusing on what she thinks because you do not want not to hurt their feelings
- Helping the coachee to find solutions to challenges	- Solely criticizing the coachee for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coachee what to do

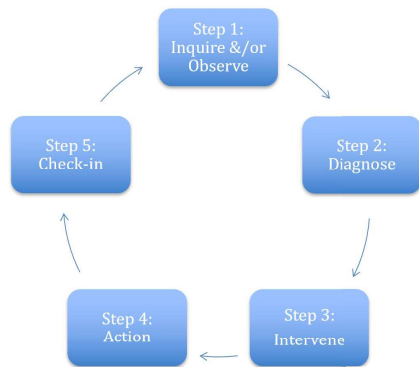
3 Kinds of Coaching- Page 130

- › Motivational - Heart Coaching aimed at enhancing motivation
- › Strategic – Head Coaching aimed at helping plan, evaluate, strategize
- › Skills-based – Hands Coaching aimed at effective



Coaching Cycle- Page 129-131

- › The reason to apply this cycle is to stop yourself from providing THE answer.
- › Leaders grow from productive struggle.



KEY IDEAS



- › Coaching is about releasing your external control and enabling the leader to grow.
- › Coaching is as much about you changing your behavior and growing your skill as it is about growing a leader.
- › We only get good at coaching by practicing it.

Coaching Scenarios- Page 133



Regroup!

- You will need to get into groups of 3.

Note: there may be 1 group of 4

Coaching Across Differences pg. 137



1. Curiosity and Compassion
2. Develop you Own Emotional Intelligence
3. Invite Conversations about Differences

Good Questions to Ask

- › What do you need me to understand about your identity in this work?
- › What would you like to know about me that would help you to work with me?
- › Tell me a story that will help me understand a part of your identity that you feel impacts you in this work.
- › What might be challenging about us working together?
- › What can I do to support you when those challenges arise?



Keightley

Remember ...

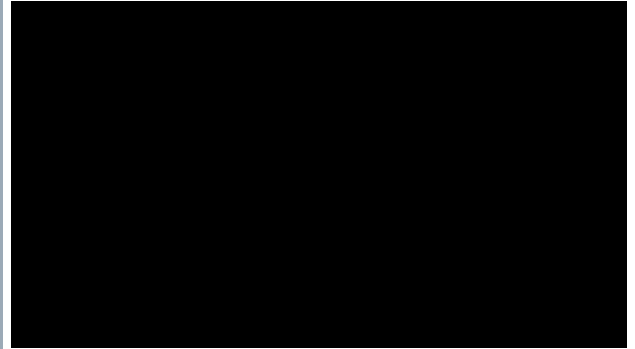
Who are leaders?

Leaders are those who take responsibility for enabling others to achieve purpose in the face of uncertainty

Remember ...

Co workers talk about those they follow as colleagues who are both Trusted and Respected.

A green highway sign with white text. The top line says "WELCOME TO" in a smaller font. The middle line says "TRUST" in a large, bold font. The bottom line says "ENJOY THE JOURNEY" in a smaller font. The sign is mounted on two metal poles against a blue sky with white clouds.



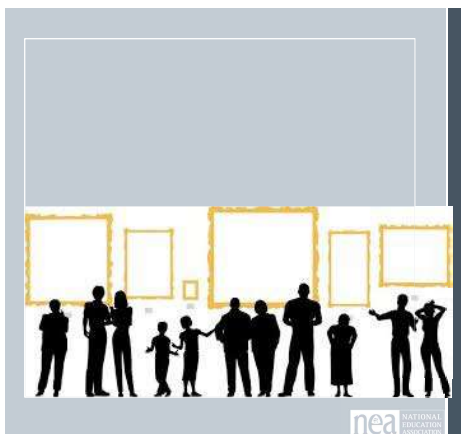
A green highway sign with white text. The top line says 'WELCOME TO', the middle line says 'TRUST' in large letters, and the bottom line says 'ENJOY THE JOURNEY'. The sign is mounted on two metal poles against a blue sky with clouds.

GALLERY WALK

What are some common barriers to building trust?

What stands out in the description of trust in a campaign?

What two ideas do you want to steal to build trust in a campaign?



Risk looks different depending on how your intersectional identities inform your relationship with privilege.

Whole group discussion:

- › How might the concept of trust differ among marginalized groups?
- › How do we assess trust among marginalized groups?
- › How do we intentionally address this in our campaigns?



RESOURCES ON TRUST

140-158



KEY IDEAS



Risk is required to move from club to fighting union and from advocacy to organizing.

Risk is inherent in an issue campaign.

If the issue is widely and deeply felt and the action seems plausible – trust is built in the doing of the action together in the face of uncertainty.

Trust is required to follow, to join in, AND to lead.

We have to plan to ensure inclusion – it just doesn't naturally happen.



Zac



Think and Talk

If you asked 10 people in one of you locals the following question:

› Who is in charge of winning this campaign, securing this demand from the boss – what would they say?

Think and Talk

As organizers, how are we continuously adding to our base of support?

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KEY IDEAS



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We have to spend most of our time talking with (not to or at) the people who aren't talking to us and we have to have a credible plan to do so.

We have to effectively, successfully, and continually, recruit people into the base of support.

Two Key Concepts in Base Building

1. Don't "3rd" Party the Union/organization



2. Put EACH person's ACTIVE PARTICIPATION at the CENTER of every conversation - "Nothing changes, aka your issue will not be fixed, without YOU"

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Safe 1/3rd versus 90%!!!

If we are only spending our time talking with the already convinced, we will never build the power needed for big change.

We are operating in the Mobilizing Theory – working with already engaged.

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Safe 1/3rd versus 90%!!!

The words we use help set up your ability to “call the question” and “frame the hard choice” in a 6-step structured organizing conversation.



How Many of You

At a meeting where loads of people show up...

Say “thank you so much for making time to be here!”

Or if a colleague offers to do an assignment as part of a team and brings back more than you even asked for... have said “thank you!”

Why is this not such a good thing?

Typical Phrase

“The union really needs everyone to step up and get more active so the union can win better protections in this collective agreement.”



Bad Words

“**The union** really needs **everyone** to step up and get more active so **the union** can win better protections in this **CBA!**”



A Better Way

“The only way for you and your colleagues to get the demand you are making of the superintendent is if you, and everyone in your school, takes the first step and signs onto this public petition.”



Hard Conversations

Semantics help us prepare to frame the choice and have hard conversations successfully.



GROUP WORK

Small Groups
Page 162
Rewrite each
phrase without
using –

**The union (or
union at all),
we, us, our, or I.**



Debrief

6 Step Organizing Conversation

1. Introductions
2. Get Issues (and Agitate)
3. Education/Vision (Organization as Solution)
4. Call the Question/Frame the Choice
5. Inoculation
6. Next Steps/Work Assignment



Handling Objections: AAR

Acknowledge/Affirm

- Affirm their feeling without legitimizing the excuse

Answer

- Answer the question and address the issue they've raised concisely

Redirect

- ASK a question that takes them back to THEIR issues



“Nothing will ever change”

Acknowledge/Affirm

- “I understand you feel that way right now, especially since the boss never talks to any of us about the changes they are making before they make them...”



“Nothing will ever change”

Answer

- While things don't change overnight, the reality is if teachers choose to do nothing then nothing will ever change.

When we come together as a union we have a chance to make improvements to these types of things because we have more power as a group than we do on our own.



“Nothing will ever change”

Redirect

– If you and the other teachers at your school had a say in the evaluations, what would be the first thing you’d improve?”



Best Practices on Objections

If they say “no” or “maybe” when you call the question,

ask, “What’s holding you back?”

Don’t spend a lot of time on the objection

Don’t let them off the hook

Don’t ignore the objection

Come back to their issues



TEAMWORK

Pg 163, 164

Some of you are Organizers

Some of you are one of the Characters

Your task is to get a commitment.



Debrief

KEY IDEAS



How we speak about the work either centers worker agency or it does not.

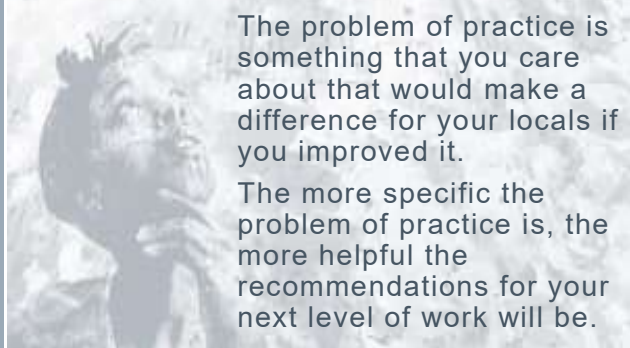
We have to be able to
TEACH MEMBERS TO DO THIS WORK

We need a continuous plan for working with the folks not already part of our base.



Renita

Problem of Practice



The problem of practice is something that you care about that would make a difference for your locals if you improved it.

The more specific the problem of practice is, the more helpful the recommendations for your next level of work will be.

Problems of Practice

- › **Triads**
- › Find the "Consultancy Protocol" on page 134
- › The purpose for the listeners is to ask good questions – not provide answers.
- › The purpose for the presenter is to determine what about their work with this problem needs to change.
- › There may not be a group debrief.



Discuss the Protocol Page 134

- › Opening (We are doing that part now)
- › Presenter – Shares the Dilemma
- › Clarifying questions (NOT Probing)- Review pages 135-136
- › Group Fishbowl – Presenter steps out and listens to the group.
- › Closing – Presenter shares what they learned

Problems of Practice

- › 50 Minutes Total
- › Each person has a chance to be the presenter
- › 15 Minutes per round



KEY IDEAS



- › Coaching is as much about you changing your behavior and growing your skill as it is about growing a leader.
- › We only get good at coaching by practicing it.



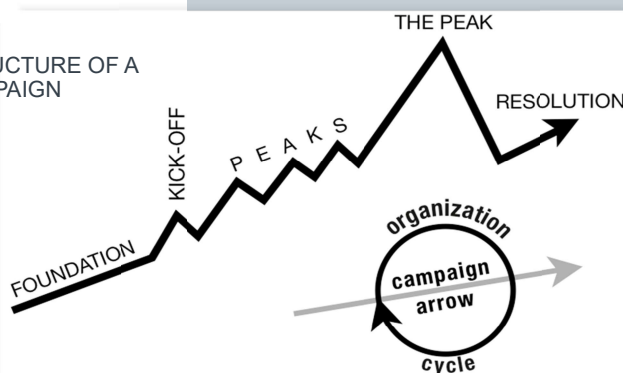
Keightley and
Jeny

So why do you think we need campaigns?

Why do we need to organize issue campaigns?

- Builds members confidence in their own agency and collective power to solve shared problems and see themselves as responsible for the win – not a third party (UD, Lawyer, Lobbyist).
- Builds power by continually increasing the amount of member leadership and ownership for the actions.
- Builds membership and solidarity through visible, credible, values-based actions.

STRUCTURE OF A CAMPAIGN



What is an Issue Campaign?

An action plan with a beginning, middle, and end, working towards a specific demand

- Involves a series of escalating actions (or tactics) that combine to solve a particular issue
- Increases pressure on decision-makers to give what will solve that issue
- Builds power by increasing engagement, developing leaders, and building capacity around the values and shared pain of the common issue.
- Throughout the campaign we **identify milestones** that indicate we have enough power to try something **more** and something **bigger** and **win!**

Key Parts of an Issue Campaign Pg 12

- Issue and Values
- Demand
- Target
- Tactics
- Escalation

Campaigns are Strategic Pg 39-50

Strategy involves asking:

- Who are my people (constituency)?
- What change do they need?
- How could they use their resources to build the power they need to achieve that change ?

Strategy is how to turn what you have” into “what you need” to get “what you want” - how to turn resources into power.

Strategy is an intentional plan

KEY IDEAS



Campaigns

- › Involve lots of people
- › Are member led
- › Require strategy
- › Increase power
- › **Creates pressure on the boss**
- › Increase visibility of the union
- › Build trust and solidarity across workers

Case Study UTLA and CTU Pg 74-90

- › Using the article from The Forge you are going to work to complete page 91.
- › Teams of three
- › Each team is assigned either UTLA or CTU
- › Complete the Chart on Page 91



STEP 1: PROBLEM, ISSUES, AND VALUES



PROBLEM vs. ISSUE

Campaigns start with issues that workers have value-based solidarity around.

An **issue** is a slice of a workplace *problem*.
Often a **problem can have different issues** depending on the perspective of the people we are working with.

It is **KEY** to get enough input on what the *issues* are that make up the *problem* so that YOU do not drive the solution.

Values

Values are fundamental beliefs that dictate behavior

Ideally, Unions advance the welfare of all workers.

They are based on the universal ideal of human rights, the idea of justice, progress, and betterment of self and of society.

Through shared values, workers build solidarity and commit to active participation in the labor movement.

Shared values transform individual members into part of something larger than themselves.

Some Union Values

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.

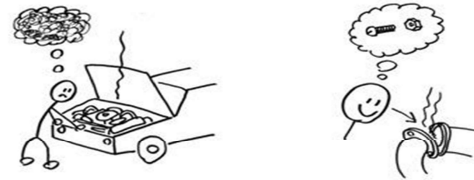
Issues and Values

Investigating worker issues is necessary but not sufficient – we also need to identify workers' **SHARED** values –

WHY is this an issue?

WHY do you want to fix this?

PROBLEM vs. ISSUE



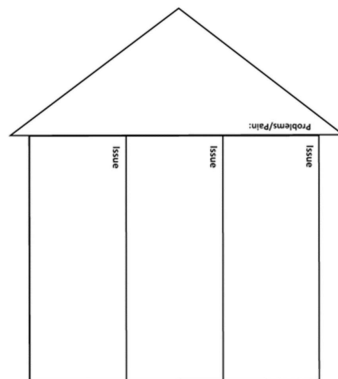
VALUES build a relatable “why”

Deserve safe and reliable transportation

Access to quality parts

Issues are the small(er) actionable pieces that contribute to the larger problem. By asking why is this an issue you can uncover values.

(Pg. 7)



EXAMPLE- Problem, Issue, and Values

PROBLEM -Our school is hostile to LGBTQ+ staff and students

◦ **Issue** – There are no gender inclusive bathrooms and/or transgender students are forced to use the wrong restroom

Values – Equity, Safety, Personal Choice, Student Choice

◦ **Issue** – Our healthcare and leave benefits do not cover non-“traditional” family structures or are not fully accessible to people with same-gender partners.

Values – Equitable Access, Fair Pay, Family

◦ **Issue** – Our administration forces us to “out” trans and queer students to their families.

Values- Professional Judgement, Safety, Student Choice

KEY IDEAS



- › Problems are big worksite conditions
- › Issues are the smaller worker identified components that make up the problem
- › Issues indicate a path to action
- › Values build a relatable why across people experiencing the pain of the problem
- › We intentionally work to connect workers around issues and values to build Solidarity

GROUP WORK

TIME: 15 Minutes

In your group, go to page 91.

Identify the following:

- Theory
- Overall Strategy
- Unifying Issues (Value)



Assessing our Issues pg 6

What makes a good issue:

- It is widely felt and/or deeply felt.
 - The pain can be felt by just one, but the injustice of that pain is shared by many.
 - The pain AND the injustice of that pain is felt by many.
- It is winnable.
- It builds the union and builds leaders.
- It has a values-based connection to our workers, students, and the public.

Assessing our Issues Pg 8

Sample chart that can be used to assess our issues

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			

Group work!



TIME: 5 Minutes

In your group, spend 5 minutes evaluating your issue using the chart in the handouts.

Be sure to identify which of the issues you listed that would have the most opportunities to connect shared values

STEP 2: DEMAND



Demand:

A demand is the **outcome** that **addresses the issue** that you are **making of a target**.

- › Measurable
- › Achievable

"We demand gender affirming bathrooms in every school because all students need to feel safe and included in our schools."

STEP 3: TARGET



Target

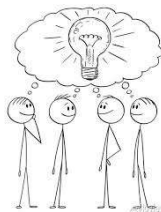
Is the person with the power to give you what you are demanding.

A single person:

a name, face, & address

“ Hey Superintendent Sam - We demand gender affirming bathrooms in every school because all our students need to feel safe and included in our schools ”

Group Work!



TIME: 10 Minutes

In your group, spend 10 minutes deciding the following:

• Demand

What do you want to win (and why) to solve your issue?

• Target

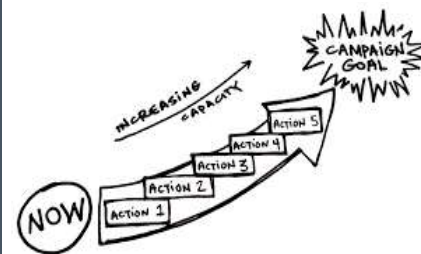
*Who has the power to give you your demand?
(feel free to make up names and titles if your scenario doesn't have one!)*

KEY IDEAS



We are always
climbing campaign
mountain path
IF we are organizing.

STEP 4: TACTICS



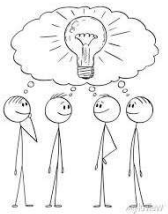
Tactics

Actions workers take as a part of an escalation plan that increases pressure on their target to try to win their demand.

Tactics

- Put pressure on the Target
(puts them out of their comfort zone)
- Build Worker Power
(develops leaders, brings more people in, etc.)
- Are Strategic

GROUP WORK!



**+++YOU HAVE 10
MINUTES!+++**

List as many tactics
you can identify from
the case studies.

What Makes Good Tactics ? Pg 13

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

KEY IDEAS

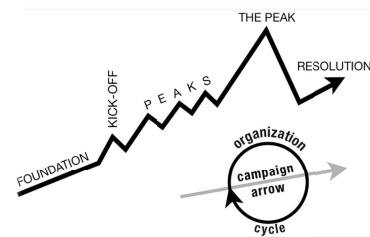


Tactics allow workers to

- › Share Resources, Values, and Commitment
- › Take risks together and achieve shared wins
- › Build trust in their own agency and the collective effectiveness of their union

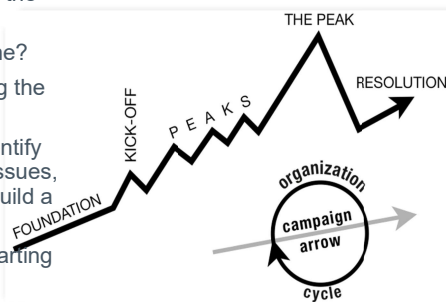
STEP 5:

Timeline, Compression Points, and Escalation



Timeline

- › How long can you wait for the demand to be met?
- › Are you creating a deadline?
- › Is there an event creating the deadline?
- › How long will it take to identify the problem, identify the issues, build a leadership team, build a presence, etc. etc. etc.
- › When do you make the starting point?



Compression Points

Points on the calendar where you celebrate short term wins or escalate your tactics.

- Naturally occurring deadlines- *Breaks, Board Meetings*
- Artificial deadlines- *target has till day X to act*
- Help us build urgency and crisis

Why do you think tactics escalate gradually?

Pg 14



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- Less escalated actions prepare our people for more escalated actions
- Give the target a point to do the right thing before things escalate to the next tactic
- Use the threat of escalation
- Allows more people to join our base



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Resources for Campaign Planning

51-59 Chapter 3 of the NEA Strike Guide

60-73 The Forge – Strategy Charts and Power Mapping



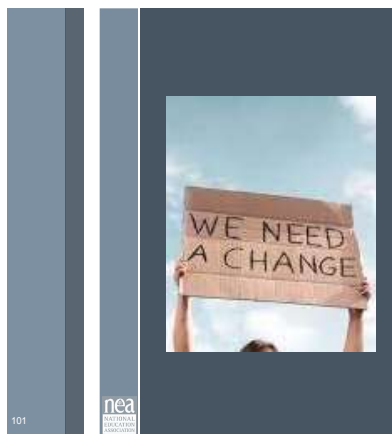
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KEY IDEAS



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- › An escalating campaign is held together by a set of values and shared commitment to a demand.
- › Escalating tactics are how we develop leaders, identify new leaders, move more people into our base.
- › If we are organizing, we are always climbing campaign mountain



Katie

Definition Alert:

Power is

- The ability to act
- The possession of control, authority, or influence over others

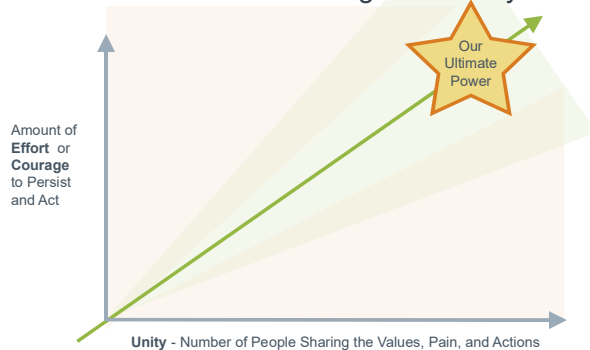


Table to Whole Room Talk

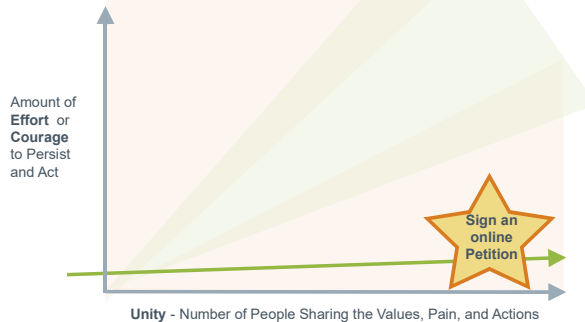
How do you design a campaign that builds trust and shared responsibility?

How are these related to building power in a campaign?

Power is a function of Courage and Unity



Low level of courage and high number of actors...



High level of courage and low number of actors...



High Participation Is a Prerequisite to Power - Super Majority of Workers Engaged

But Also Need...

Unity (against division) TIGHT
STRUCTURE Demonstrable &
Sustainable Super-Majorities

It's your turn –

Where is each scenario on
this graph (p.16)?

Do they have the power to
achieve their demand? Why?

What would you do to
increase the power needed to
achieve their demand?



Do they have the power to get their demand?

Scenario 1 – Special Education Paperwork

Cadre of special education teachers (25) identified by union staff have been meeting during all committee days at the state union offices. They are going to teach others how to deal with the overwhelming amount of paperwork required of them. They hope to reach 200 of their colleagues across the state in 4 trainings this year. They demand a change in regulations regarding paperwork.

Scenario 2 – Contract Ratification

A bargaining team representing a local of 6,500 employees, has sent out an all member survey (75% return rate), has provided monthly bargaining updates via email and building rep network, and has held three informational sessions on their progress with an attendance of 45 – 55 people at each one. They have struck a TA with the district that has a low salary increase but a higher level of professional planning during the day and two extra professional leave days. They demand a ratification at 90% or higher.

Scenario 3 – Safety on the School Busses

Bus drivers have been collecting and sharing data of violent incidences on the busses that include both parents and students. They have been sharing that data with the union and developed an online series of stories. They have engaged parents who rely on the busses to transport their children and build a community group presence that has regularly attended school board meetings across 6 months. The bus drivers union, the classroom teachers union, and the ESP union have all developed messaging and are now supporting members who see this as a problem to show up at the school board to provide testimony. Their data shows that there are a cumulative number of people willing to take action of over 400 people. They demand the school district to provide each bus with a full time monitor, two cameras, and a process for dealing with parents and students who have been violent towards drivers.

KEY IDEAS



- › Our role is to help with a power analysis – who is the target and how much pressure and people power will it take for them to concede?
- › Our role is to teach the methods of sharing value based messages
- › Our role is to teach the methods for building solidarity across large numbers of people.
- › The people have to put for the EFFORT to BUILD THE COMMUNITY OF ACTORS
- › The people have to have the COURAGE to do the ACTIONS
- › It is their union not our union.

Zac



4 Core Concepts for Winning

1. Structure NOT Self-Selecting
2. Leaders NOT Activists
3. Majorities NOT Minorities
4. Organizing NOT Mobilizing/Activism

What is your role in ensuring the successful achievement of these demands?

What is your job?

1. Organic Leader Identification
2. Semantics and Structured Organizing Conversations
3. Tactics and Escalation

KEY IDEAS



The way win –

We have a solid structure of actors – leaders, mobilizers, activists that are bound by shared pain, values, commitments, and purpose.

We are operating in an organizing theory that seeks to move more and more into our base to build a super majority

The way we talk about the work matters in building agency and solidarity at a scale big enough to win



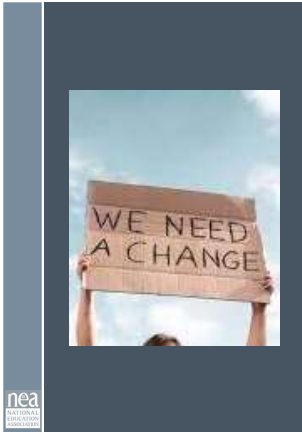
Renita

Campaign Clinic



Some starting points

- › Does the campaign have all 5 parts?
- › Is there a clearly understood value driven narrative?
- › To what extent is the campaign led by a leadership team?
- › What intentional ways have you recruited and involved people who are marginalized?
- › What percent of the workers are engaged?
- › What is working?
- › What is not working?
- › Where are you stuck in your campaign?



Ellen



Ending it Right

- Choice Networking
- Housekeeping
- Feedback via email



Choice
Network
Time