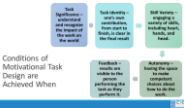


Facilitator Agenda: Day # 3 Organizing ESP

General Materials Needed:		Room Set-up:		
1 Set of Handouts per Person	Chart Paper	Round Tables		
Name Tags or Name Tents	Post its	Projector, Screen and Speakers		
Room signs, sign-in signs	Chart Markers – Mr. Sketch	Carousel stations and reporting stations around the perimeter		
Painters Tape	Pens and Pencils	50 people		
Key Outcomes for the Day				
Time	Essential Questions	Resources	Instructions, Activity and Debrief (Facilitators)	Outcomes
	What question(s) should this learning section answer?	Charts, handouts, articles, materials, slide	What are you saying, what are they doing, what questions will you use to guide learning and make clear the important points Include an estimate for how long each section of the learning will take	As a result of this section of learning, what will participants know or be able to do?
Entry Activity				
8:30 - 9:00 	What have you been thinking about so far?		30 Minutes - Welcome back - (Ellen) Norm Review Reentry Feedback on Feedback Today, we are going to turn again to looking at leaders and structures but with more of an eye towards coaching and testing – here is what we mean by testing – if you agreed you would do it, did you? Why or why not?	Participants will re-enter the learning environment.
9:00 – 9:30 		Leadership Development Tasks – Tests https://neahq-my.sharepoint.com/:w/g/personal/eholmes_nea_o	30 Minutes - Building Engaged Leaders P. 87 (Ellen/Hedy) 5 Min (9:45-9:50) - Content Intro A big idea that we often readily accept when working with certificated units, but are reluctant to believe when working with ESP units is that the best way to grow leaders is to give them meaningful, challenging (risky) tasks (tests) and see if they can achieve them. Then, give them another task to do. At the next level. If we are nervous and not willing to hear “no” when we ask leaders to do	Participants will use a number of examples to understand how to design tasks (tests) that develop leaders towards more ownership and leadership in their work.

  		rg/EUD00EWDI8JLgG6JtOPhF18BDzFCH48jOvmRHlUhsCL2OA?e=1G CChf Activities that will be sorted on grid https://neahq-my.sharepoint.com/:w:/g/personal/eholmes_nea_org/Ef1NjHpf8bVOIewZ--62iD0BQCFAWfc tWvSahU2YItXvmA?e=qnchu7 Structures – Jane McAlevey https://neahq-my.sharepoint.com/:b:/g/personal/eholmes_nea_org/EU1lGwUfE2NFtzpo0cmE2nwBnG5kRFXz2qQGEoa1HFG5w?e=NJmS7M	challenging risky things – we never move them along in their development and the affiliate does not move along the club to fighting union curriculum. The three conditions to keep in mind when you are developing “tasks” that test and build a leader are Meaningfulness, Responsibility, and Results. The person’s perspective about the task is what is most important here – EX. Some will find meaning in asking their colleagues to participate in a bargaining survey while others will find meaning and challenge in learning how to conduct and track member recruitment conversations. How you make the ask or invitation into the task for the leader matters too – you really need to be able to communicate WHY the task is significant, that their input and contribution will be key to the ask or task accomplishment, that a number of skills may be required, and the leader will be able to apply judgement to accomplish the task. They also grow when they know you will be meeting to discuss the outcomes and figure out next steps. Nothing is meaningful if you aren’t expected to be accountable. 25 Min (9:50-10:15) - Engagement Grid Activity 5 Min (9:50-55) - Introduction of the grid - Recall that an important part of our leadership definition is “enabling others to achieve purpose in the face of uncertainty” then how we design our tasks and tests for leaders matters. <i>[Model this with chart paper in front of everyone while talking through]</i> We are going to be using an engagement grid that has two axis – the vertical one is the leadership, and the horizontal one is the ownership. If you engage a leader into a task in which you have taken all the ownership and risk for the task, and all the leadership – then it is servicing – for example A completely staff led new employee recruitment table. As the leader takes on more ownership, then it moves to socializing – think new employee meet and greet with local leaders. As the task grows in leadership it becomes a “task” – think an annual new member meeting that you direct the local to do – but they	
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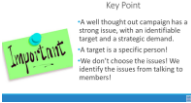
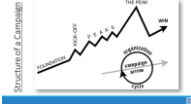
			take on all the roles of implementing it. As the task moves towards high leadership and high ownership – it moves into organizing. Example leaders determine why they are engaging with new employees, how they will do it, and what the outcomes will be. You are consulted and might be asked for resources or coaching. 15 Min (9:55-10:10) - Work time -- As the facilitator determine if it is time to regroup the participants – if so – do a count off into groups that result in working teams not larger than 4 to 5 – Make sure each group has a set of activity cards and knows where to find the sorting grid. Directions - Turn to the page with the Engagement Grid ----- As a team, sort the activities (these are found on the last page of the packet –or as a team – you can cut then into strips and put them in envelopes during team planning) into the most appropriate quadrants. Come to some level of agreement as a team about WHY you are placing these where you are. 5 Min (10:10-15) - Debrief: Why were activities placed where they were? Were there any of the engagement activities that your table struggled with placement?	
9:30 -10:30 Seleste and Katrina	How will we bring more people to the campaign?		60 Minutes – Transformation Conversations (Seleste/Katrina) Minutes Total - ORGANIZING CONVERSATIONS 15 Minutes –Basics of One on Ones Why do we want to build relationships? Organizing is 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 our public relationships.	Participants will learn about the best practices for recruiting members

"Organizing is a fancy word for relationship building." — Mary Beth Rogers Relationships are Build Around Shared Values Long Term Mutual Commitment Involve Consistent Attention and Work How we Build Relationships: - One to Ones - House Meetings - Organizational Mtgs - Team Meetings Basics of One on Ones We listen to relate to our people - Listen 80%; talk 20% - Use open ended questions - Not about winning an argument or interrogating - Learning where our stories connect We ask for commitment - Use direct and specific language - Stress the shared values you have exchanged - Frame it so that the person IS the solution to the ask We ask to identify leaders - Who is trusted and respected - In order to objectively identify leaders, we must ask our people			Show the quote – Organizing is a fancy word for relationships. Relationships are Like in other parts of our lives, are based on shared values and shared purpose. Relationships are long-term. But remember, having shared values, a shared purpose and some skills & resources doesn't mean that you have a relationship. If there is no commitment, there isn't any glue in your relationship – it won't last. A relationship with no commitment is not a relationship. If several people come to an association event but I don't ask them to explicitly to make a commitment to joining me in this work, then they may have a relationship to with me, but not with the campaign or the association. These are several ways you can build relationships but the one we will focus on now is the One-to-One. This is a great tool to identify leaders and recruit them into leadership teams. They are critical for building strong relationships in which both people grow and learn together over time. We use them to build community and commitment within a new leadership team. We use them to build deeper relationship with some people we may already know from other work. Basics of One on Ones We listen to relate to our people • Listen 80%; talk 20% • Use open ended questions • Not about winning an argument or interrogating • Learning where our stories connect We listen to identify issues • Use probing questions • What's not right? • What would they change? • How could our schools be even better for us and our students? We ask for commitment • Use direct and specific language • Stress the shared values you have exchanged • Frame it so that the person IS the solution to the ask We ask to identify leaders	
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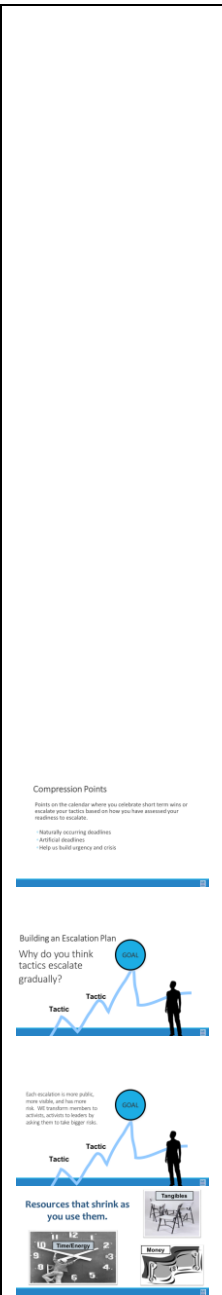
3 Types of One on Ones Recruitment Escalation Maintenance Power of Positive Messaging -Transformational vs. Transactional -Strength in numbers -Magical wand conversation Responding to Recruitment Objections- pg. 58-67 A-Affirm A-Answer B-Redirect Conversation Wheel -Exploration and Exchange -Shared vision and shared values -Shared goals -Shared challenges and shared risks -Shared opportunities -Shared vision and shared values -Shared goals -Shared challenges and shared risks -Shared opportunities			- Who is trusted and respected - In order to objectively identify leaders, we must ask our people There are three types of one on ones Recruitment : These meetings happen at the start of a relationship to connect you and a new to you worker 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 worker to action based on what you’ve discussed. Escalation: These meetings are for workers who are ready to take the next step on the “ladder of engagement” in assuming more responsibility and taking on ownership of goals. First, recognize the accomplishments the worker has already made, then propose the idea of taking on this new leadership role. If all goes as planned and the worker accepts, take the time to clearly lay out the responsibilities and expectations for this new role. Maintenance: These meetings should occur regularly between you and each of your workers. This is an opportunity to catch up on a personal level, debrief recent actions taken by the workers 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. POWER OF POSITIVE MESSAGING in RECRUITMENT ONE ON ONES Positive messages are transformational instead of transactional. A transformational framework is one that encourages the potential member/member to see themselves as adding to their own power by joining our union. Transactional messages tend to focus on perks and prizes. Or “give to get.” Transactional messages can often position the potential member as a “customer.” Strength in numbers messages center around the power of collectivity and how we can accomplish more together. Magical wand conversations are about imagining a better future together. Those conversations help the member envision and get invested in a better world. 10 minutes -- RESPONDING TO OBJECTIONS Activity Part 1: Ask participants to popcorn out typical objections. Talk about how the practice of AAR Works. First you AFFIRM – Which means acknowledging the objection, without dismissing it or minimizing it.	
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			ANSWER – Give accurate information or agree to go find it. REDIRECT – Pivot the conversation back to common values and hopes for the future. Activity Part 2: Put objections up on the wall – one for each sheet and then brainstorm how to use AAR to address them. Having the conversation – The 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 PRACTICE Organizing Conversations <u>30 Minutes for Activity</u> 5 Mins - SET- UP ACTIVITY Count off by 3s. 1's are the organizers. 2 are the workers. 3 are the observers. 1's form a line at the front of the room and all the 3's will form a line at the back. 1s find a 2 that you want to recruit and have an organizing conversation with. - ONCE THAT IS DONE- 3s, find a pair to observe. 1s- Start a conversation and get to know this person – this is not a scenario. Get to know them as one union staff person to another. Work to identify shared values, their number-one workplace issue and find out as much as you can by only asking questions. It's important that we use open-ended questions. Closed questions are yes/no questions. Examples: Closed question: "Do you like where you work?" Open question: "What do you like about your job?" Seek some sort of commitment	
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			20 Mins- GROUP ACTIVITY- 1's ask the questions, 2's answer, 3's observe 5 Mins- DEBRIEF/ WRAP-UP • Whole group ○ How did that go? ○ What did we learn? ○ Was it hard to only ask questions? ○ Observers, what did you notice? • KEY POINTS ○ Listen and Ask Questions • We want our workers to realize: ○ They care about a problem. ○ There is a decision-maker who has the power to fix this problem. ○ The decision-maker won't fix it until someone pushes them to. ○ If your worker really wants this problem to be fixed, they have to join you and others in taking action.	
10:30-11:00 Naomi (Nancy) When making a demand ...   Scenario World! Identifying Issues, Demands, and Targets In your groups, think to your demands and decide the "what" and "who" of your demands (what you want and who you want it from) Demands What do you want to be able to do? Targets Who do you want to give you what you want? 	What is a demand? How do we identify a target?		30 Minutes – Demands and Targets (Naomi) 3 Mins Total- INTRODUCE DEMAND and Set Up • A demand is what the group wants– the win – • A demand is the outcome that addresses the issue you are making of the target • If the issue is what is wrong, the target is what we want that will fix the issue. 3 Min- INTRODUCE TARGET • The last idea that we want to cover is Targets. • TARGET: A target is a single person with a name and an address. The target is the person with the power to give the workers the change they are asking for. <u>A target has a name, a face and an address.</u>	

			17 Mins – GROUP WORK In your groups, return to your scenario and decide the: Issue <i>Keep in mind what makes a good issue!</i> Demand <i>What do you want to win to solve your issue?</i> Target <i>Who has the power to give you your demand?</i> 2 Min- WRAP UP/KEY POINTS • A well thought out campaign has a strong issue, with an identifiable target and a strategic demand. • A target is a specific person! • We don't choose the issues! We identify the issues from talking to members!	
11:00-11:15 	BREAK			
11:15-11:30 Hedy (Heidy) 	What are the strategic actions and use of resources we will use to achieve our demand? How can we apply what we have learned?	Campaign Plan https://neahq-my.sharepoint.com/:w:/g/personal/eholmes_nea_org/ERzhoMiTwbZBnVGWtjZp7vMBgcovRLVClohZqMR4in49ww?e=R6d68g	15 Minutes – Tactics & Escalation Continued (Hedy) 35 Minute Total –Tactics and Escalation Tactics – Escalations – 5 Mins- INTRODUCE Campaign Mountain • Foundation – gather info, id issues, id leadership team • Kick-off –public event that indicates what the issue, demand, and targets are • Escalating peaks of activity that should escalate in ○ Risk ○ Capacity (people, resources, engagement) ○ Increase leadership and ownership • Campaign Compression Points	Participants will develop an organizing plan with teams that can be shared with Participants will develop an organizing plan with teams that can be

Tactics  A GOOD TACTIC IS 1. Put pressure on your target 2. Build your power 3. Be strategic Scenario Work! Tactics Brainstorm ***YOU HAVE 5 MINUTES!*** Brainstorm AS MANY tactics as you can on 1 chart! - Be creative! - You are NOT evaluating right now! Everything goes on the board! 			• THE PEAK – The most public, risky, momentum, engagement, and resources • The Win- We achieve our demand • Debrief, regroup, and continue to climb 2 Mins- INTRODUCE Tactics Next we are going to talk about Tactics. Tactic are Actions you to take as a part of an escalation plan that increases pressure on your target to try to win your demand. What are some examples of tactics? <i>(Have a few people share out some tactics)</i> We are going to model a tactics brainstorm that you can use when working with members. 5 Minutes Scenario Work Brainstorm AS MANY tactics as you can on 1 chart. • Be creative! • You are NOT evaluating right now! Everything goes on the board! We are going to have 5 minutes to list as many tactics as you can. Extra points for super creative ideas. WE ARE NOT. NOT. NOT. Evaluating tactics at this time. If someone says something (example- We are going to wear the same clothes without washing them until we get what we want) you right it down and move on. All ideas get on the board. Again, this is a brainstorm. NO EVALUATING. YOU HAVE EXACTLY 5 MINUTES. After 5 minutes put your pens down. Open your phone and actively start a timer. “ON YOUR MARKS. GET SET. GO” Excellent! We now have a whole list of tactics. Next. We are going to assess our tactics. For this, I encourage you to use a list of questions like this- 3 minutes- How to evaluate a tactic • Does the action relate to your issue? • Will it increase the pressure on the decision-maker?	shared with the whole group. the whole group.
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 Compression Points Points on the calendar where you celebrate short term wins or escalate your tactics based on how you have assessed your readiness to escalate. Naturally occurring deadlines Artificial deadlines Help us build urgency and crisis Building an Escalation Plan Why do you think tactics escalate gradually? Tactic Risk Resources that shrink as you use them. Tactic Risk Targets Money			<i>NOTE! This means that we have to engage in actions that make our target uncomfortable. SOOOOO the same old tactics WON'T WORK! They are used to them!</i> • Is it visible? • Is it timed for effect? • Is it new and different—or tried and true? <i>Note! SEE above. If a tactic is the same as always, your target has likely become comfortable with it AND it won't develop new skills in your members and therefore build your power.</i> • 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?) <i>NOTE! This doesn't mean that it is off limits. Historically, breaking laws has been a big part of social justice movements. ESPECIALLY THE LABOR MOVEMENT! However, we have to consider if an unlawful tactic is the right tactic and whether you have the power to mitigate/absorb the consequences.</i> • Will it be fun? <i>Folks want to engage in things that fill them up! Many of the same old</i> 10 minutes- Evaluating your tactics You have 10 minutes. Look at your list of tactics. - Circle the ones that you think are strategic, when looking at these questions. - Cross out the ones that are NOT strategic. 2 Minutes – Compression Point Definition Points on the calendar where you celebrate short term wins or escalate your tactics based on how you have assessed your readiness to escalate. ○ Naturally occurring deadlines ○ Artificial deadlines ○ Help us build urgency and crisis 2 Minutes – Turn and Talk We keep saying that tactics should escalate gradually why do you think that is? 2 Minutes – Debrief Each escalation is more public, more visible, and has more risk. WE transform members to activists, activists to leaders by asking them to take bigger risks	
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Resources that Grow as You Use Them  Relationships Skills Hope Trust Scenario Work! Building your Escalation Campaign STEP 1: Decide on your tactics (Use the evaluation questions on Pg. 106) STEP 2: Add in any compression points that are important to your campaign STEP 3: Build your tactics into an escalation campaign (Use the campaign resource on Pg. 110) Key Points Strategy without tactics is simply a collection of good ideas and big dreams. Tactics without strategy are a random collection of activities and wasted resources. The bigger the win you want, the more resource you need. Good tactics actually result in more resources – relationships, skills, hope and trust.			2 Minute – Just a word about resources RESOURCES: Resources are what are available to the people who are part of the campaign to use to achieve their demand. Resources that shrink as you use them • Time/Energy • Tangible Items – materials • Money Resources that Grow as you use them • Relationships • Skills • Hope • Trust 2 Minute on Key Points • Strategy without tactics is simply a collection of good ideas and big dreams. • Tactics without strategy are a random collection of activities and wasted resources. • The bigger the win you want, the more resource you need. • Good tactics actually result in more resources – relationships, skills, hope and trust.	
11:30-12:15  Team Work Time			45 Minutes - GROUP WORK TIME (Ben/Ginny) Now you are going to use the learnings from demand targets tactics and escalation to add into your campaign plan you have been working on for the past 2 days. The end product of this work time is a be able to present your issue and campaign plan to the group.	

			You may not have a fully flushed out plan, but the idea is to have something to be able to share with others that incorporates the learning and insights from this training.	
12:15 -12:45 	How can we apply what we have learned?		30 Minutes - Team Presentations (Daria) 3 team triads and group of 2 – 10 minutes each Feedback question • What specific elements of the plan stood out to you? • How did the plan engage others around the values they share? • How did the plan address finding and developing leaders to help implement the plan? • In what ways does the plan use opportunities to build structure and power?	Participants will develop an organizing plan with teams that can be shared with the whole group.
12:45- 1:00			Ending Right (Ellen)	
1:00	Boxed Lunches ADJOURN			