

# Foundations Academy Facilitator Agenda: Day #5

| General Materials Needed:    |                                                                | Room Set-up:                                                  |
|------------------------------|----------------------------------------------------------------|---------------------------------------------------------------|
| 1 Set of Handouts per Person | Chart Paper – Large Post-it Style                              | Round Tables                                                  |
| Name Tags                    | Post its – Regular size and large size (4"x5")                 | Projector, Screen and Speakers                                |
| Table Tents                  | Index Cards – 3"x5"                                            | Carousel stations and reporting stations around the perimeter |
| Sign-in Sheet                | Highlighters – 5 Colors – Pink, Orange, Yellow, green and blue | 40 people MAX                                                 |
| Agendas on the table (1 per) | Chart Markers – non-permanent chisel tip                       | Material Boxes with Participant "toys" on each table          |
| Room signs                   | Pens and Pencils                                               | CHARTS :<br>Data from schools<br>Campaign plan                |

## Key Outcomes for the Day:

Participate in a successful Worksite Organizing Practice debrief

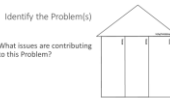
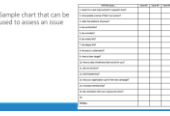
Apply basic organizing campaign elements

| Time                                                                                                                                                                                               | Essential Questions                                   | Resources                                    | Instructions, Activity and Debrief (Facilitators)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Outcomes                                                                               |
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|                                                                                                                                                                                                    | 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<br>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? |
| <b>Jessica</b><br><br><br><br> |                                                       |                                              | <b>Entry Activity- Affinity wall of issues and quantitative outcomes.</b><br><br><b>Team needs to make during the day of worksite visits:</b> <ul style="list-style-type: none"> <li><b>Chart with site locations and # of Cards and # of New Membership Forms #of conversation</b></li> </ul><br><b>DIRECTIONS:</b> On the Worksite Charts add your team's data to those On post-it notes, write work-site problems you heard while on your school visits. Please write one per post-it. Place these on the designated wall. As you put yours up, and you notice that it is similar to another one that is |                                                                                        |

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|                                                                                                                                       |  |                                                                                                                                                     | already posted, put yours near it... what we should achieve are groups of issues that are in the same category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                          |
| <b>8:30- 8:40</b><br><b>Ellen</b><br>                 |  |                                                                                                                                                     | <b>10 Mins- INTRODUCTION</b><br>Welcomes, review of agenda, norms, feedback and spirals                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Final welcome and bring a burst of energy to the space.  |
| <b>8:40-9:00</b><br><b>Jessica &amp; Halimah</b><br> |  | <i>SET-UP Chart of outcomes - Goals from the day before</i><br><br><i>SET- UP If possible, Pull up back end of data tracker to review outcomes.</i> | <b>Worksite Organizing Practice Visit Debrief</b><br><b>18 Mins- FACILITATED DISCUSSION -DISCUSSION ABOUT APPLICABILITY</b> <ul style="list-style-type: none"> <li>What have you learned from this Worksite Organizing Practice experience that you can apply to your work at home?</li> <li>What are other strategies that you have for running a debrief?</li> </ul><br><b>2 Mins - WRAP UP/ KEY POINTS</b> <ul style="list-style-type: none"> <li>If we don't debrief, review data and reflect on what worked/did not work – we cannot accurately gauge our progress or moderate our plans towards our desired goals.</li> <li>Debriefing builds capacity and culture for learning.</li> </ul> | Participants will experience a well-designed debrief and |
| <b>9:00-9:30</b>                                                                                                                      |  |                                                                                                                                                     | <b>30 Minutes--Affiliate Partner Debrief</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                          |

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| <p><b>Jessica &amp; Halimah</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  |                                                                                                                                                                            | <ul style="list-style-type: none"> <li>• Celebrate the Outcomes</li> <li>• What are the issue themes you surfaced</li> <li>• What are challenges you surfaced</li> <li>• Is there anything you can share that would help them next time</li> <li>• <b>Why is it important to debrief and not just move on to the next thing?</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                 |
| <p><b>9:30-9:50</b><br/><b>Hedy</b></p>  <p>Why?</p> <p>For Example – Grievance, Policy, or Legal Approach Only</p> <p>Why? speaking, presenting, and doing the most talking/advocacy?</p> <p>Why? Staff led actions are the fastest form of member engagement and to reach other members.</p> <p>Why? Through this method you have great outcomes but they often result in making members feel that it was a hard party that got the way (SOL, Lateral, Lateral)</p> <p>An Organizing Approach</p> <ul style="list-style-type: none"> <li>• Staff organized activities, tactics, and campaigns have a positive, visible presence and members feel that they have the collective power to solve their problems – not a third party (SOL, Lateral, Lateral)</li> <li>• When the entire building, local, or coalition comes to the issue, those others see themselves in both the action and why.</li> <li>• When</li> </ul> <p>Campaign</p> <p>Key Points</p> <p>Staff led actions are low in leadership development, and low in member ownership. Campaigns are visible to the people in the actions and shift power.</p> |  | <p><u><a href="#">Case Study in Organizing Scenario</a></u></p> <p><u><a href="#">Making a Plan (Labor Notes)</a></u></p> <p><u><a href="#">Campaign Worksheet</a></u></p> | <p><b>Why do we do campaigns--</b></p> <p>Transition to Enchanted County- We are going to return to Enchanted County and the team that you have been working with. We will stay in these teams for the rest of our time. Please locate the list of issues that your team identified relating to the problem that your team has selected to focus on.</p> <p><b>15 Mins – Content Presentation</b></p> <ul style="list-style-type: none"> <li>○ Why would we want to organize a campaign to solve an issue?</li> <li>○ Why not just file the grievance, get the lawyer to take the case, or have the lobbyist work with law makers?</li> <li>• <b>KEY POINTS TO PULL OUT-</b> <ul style="list-style-type: none"> <li>○ Grievances, Legal Actions, or Policy work done poorly and without members leading does not build power.</li> <li>○ These can build power when they are done right and help give people agency and voice.</li> <li>○ In your formal process you play a role, but how do you flip the power/focus in the room from you to a process that allows the member (coached and supported) to lead and self-advocate – this is when you help grow leadership and ownership</li> <li>○ Who is speaking, presenting, and doing the most talking/advocacy? When the entire building, local, or coalition comes to an action that is powerful!</li> </ul> </li> </ul> | <p>Participants will think about how advocacy and organizing work together.</p> |

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|  |  |  | <ul style="list-style-type: none"> <li>○ Direct, Staff-led Advocacy is the lowest form of member engagement and is most often invisible because there is very low leadership and ownership by the members – they are dependent on the staff for the outcome.</li> <li>○ Well- organized worksites, locals, and coalitions have a positive, visible presence and members feel that they have the collective power to solve their problems.</li> <li>○ Campaigns continually increase the amount of member leadership and member ownership of the issue, actions, and win. They build power.</li> </ul> <p><b>4 mins – INTRODUCTION TO CAMPAIGN PLANS</b></p> <ul style="list-style-type: none"> <li>● So why do we need campaigns? A campaign is an action plan with a beginning, middle, and end, working towards a specific demand that we want to win.</li> <li>● A campaign has a target, someone who can give us what we want. It usually involves a series of escalating actions (or tactics), which means that we progressively turn up the heat.</li> <li>● A good campaign creates increasing pressure on decision-makers over time by escalating the intensity and visibility of the tactics and increasing the numbers of people involved.</li> <li>● Campaigns are a way to identify in advance the ingredients we need to win and put them together in a way that maximizes our chances of success.</li> <li>● One isolated action may not be enough to solve the problem.</li> <li>● Campaigns help us to shift the balance of power in our workplaces and build members’ confidence.</li> <li>● Many issues that members care about can’t be solved with grievances. <ul style="list-style-type: none"> <li>○ Besides, grievances are invisible to most members, because they don’t usually involve collective action.</li> </ul> </li> <li>● We need our actions to be participatory and public.</li> </ul> |  |
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| <p><b>9:50 -10:20</b></p> <p><b>Grat</b></p> <p>Problem vs. Issue</p> <p>Campaigns start with issue members care about.</p> <p>An issue is a slice of a workplace problem.</p> <p>Often a problem can have different issues depending on the perspective of the people we are working with.</p> <p>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.</p> <p><b>PROBLEM VS. ISSUE</b></p>  <p><b>Identify the Problem(s)</b></p> <p>What issues are contributing to this Problem?</p>  <p><b>Example - Problem to Issue to Win</b></p> <p>Problem: Students do not feel represented in the building.</p> <p>Issue: Students not involved in policy that affects their education to have meaningful input on decisions.</p> <p>Issue: Education time to teach is severely limited by tests that don't measure learning.</p> <p>Issue: Education work and professional practice are not adequately compensated.</p> <p><b>Strategy WIF - Educators feel respected</b></p> <p>Problem WIF - Educators building leadership is severely limited.</p> <p>Issue WIF - Educators have to teach meaningful content and have an environment to teach.</p> <p>Issue WIF - Compensation meeting the work and expectations.</p> <p><b>Assessing an Issue</b></p> <p>What makes a good issue:</p> <ul style="list-style-type: none"> <li>It is widely felt.</li> <li>It is deeply felt.</li> <li>It is winnable.</li> <li>It builds the union and builds leaders.</li> <li>It has a connection to students and the public.</li> </ul> <p>Sample chart that can be used to assess an issue</p>  | <p>What makes good organizing issues?</p> <p>What is a demand?</p> <p>How do we identify a target?</p> | <p><a href="#">Case Study in Organizing Scenario</a></p> <p><a href="#">Making a Plan (Labor Notes)</a></p> <p><a href="#">Campaign Worksheet</a></p> | <p><b>30 Minutes – Issues, Demands, Target</b></p> <p><b>5 Min- IDENTIFYING AN ISSUE/ ACTIVITY SET-UP p104,111,112</b></p> <p><b>PROBLEM vs. ISSUE, p. 105</b></p> <ul style="list-style-type: none"> <li>Campaigns start with issues members care about.</li> <li>An issue is a slice of a workplace problem.</li> <li>Often, a problem can have different issues depending on the perspective of the people we are working with.</li> <li>It is key to get enough input on what the issues are that make up the problem <u>so that YOU don't drive the solution.</u></li> <li>A staff-driven solution may not meet the needs and commitment of the people you are working with.</li> </ul> <p><b>How to select an issue, p. 104</b></p> <ul style="list-style-type: none"> <li>Since there may be many issues confronting workers on the job, we have to also think about what makes a good issue to organize around.</li> <li>CRITERIA: <ul style="list-style-type: none"> <li>It is widely felt.</li> <li>It is deeply felt.</li> <li>It is winnable.</li> <li>It builds the union and builds leaders.</li> <li>It has a connection to students and the public.</li> </ul> </li> </ul> <p><b>3 Mins Total- INTRODUCE DEMAND and Set Up p.107</b></p> |  |



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| <p><b>10:20-10:55</b><br/><b>Jeny</b></p>  <p><b>Tactics</b><br/>Tactic – Actions you take as a part of an escalation plan that increase pressure on your target to try to win your demand.</p>  <p><b>Scenario Work / Tactics Brainstorm</b><br/>***YOU HAVE 5 MINUTES!***<br/>Brainstorm AS MANY tactics as you can on 1 chart.<br/>- Be creative!<br/>- You are NOT evaluating right now! Everything goes on the board!</p>  | <p>What are the strategic actions and use of resources we will use to achieve our demand?</p> | <p><a href="#">Case Study in Organizing Scenario</a></p> <p><a href="#">Making a Plan (Labor Notes)</a></p> <p><a href="#">Campaign Worksheet</a></p> | <p><b>35 Minute Total –Tactics and Escalation</b><br/>Tactics – p 111<br/>Escalations – p 112, 113-114<br/><b>5 Mins- INTRODUCE Campaign Mountain p. 103, 108-110</b></p> <ul style="list-style-type: none"> <li>Foundation – gather info, id issues, id leadership team</li> <li>Kick-off –public event that indicates what the issue, demand, and targets are</li> <li>Escalating peaks of activity that should escalate in             <ul style="list-style-type: none"> <li>Risk</li> <li>Capacity (people, resources, engagement)</li> <li>Increase leadership and ownership</li> </ul> </li> <li>Campaign Compression Points</li> <li>THE PEAK – The most public, risky, momentum, engagement, and resources</li> <li>The Win- We achieve our demand</li> <li>Debrief, regroup, and continue to climb</li> </ul> <p><b>2 Mins- INTRODUCE Tactics</b><br/>Next we are going to talk about Tactics.<br/><b>Tactic</b> are Actions you to take as a part of an escalation plan that increases pressure on your target to try to win your demand.</p> <p>What are some examples of tactics? <i>(Have a few people share out some tactics)</i></p> <p>We are going to model a tactics brainstorm that you can use when working with members.</p> <p><b>5 Minutes Scenario Work</b><br/>Brainstorm AS MANY tactics as you can on 1 chart.</p> <ul style="list-style-type: none"> <li>Be creative!</li> <li>You are NOT evaluating right now! Everything goes on the board!</li> </ul> | <p>Participants will practice creating a campaign plan with all the required elements.</p> |
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|  |  |  | <p>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.</p> <p>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-</p> <p><b>3 minutes- How to evaluate a tactic</b></p> <ul style="list-style-type: none"> <li>● Does the action relate to your issue?</li> <li>● Will it increase the pressure on the decision-maker?</li> </ul> <p><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></p> <ul style="list-style-type: none"> <li>● Is it visible?</li> <li>● Is it timed for effect?</li> <li>● Is it new and different—or tried and true?</li> </ul> <p><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></p> <ul style="list-style-type: none"> <li>● Are enough people ready to do it?</li> <li>● Will it unify people?</li> <li>● How will management react?</li> <li>● Does it violate the law? (If so, are we prepared for the consequences?)</li> </ul> <p><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></p> <ul style="list-style-type: none"> <li>● Will it be fun?</li> </ul> |  |
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| <p>Compression Points</p> <p>Points on the calendar where you celebrate short term wins or escalate your tactics based on how you have assessed your readiness to escalate.</p> <p>Naturally occurring deadlines<br/>Artificial deadlines<br/>Help us build urgency and crisis</p> <hr/> <p>Building an Escalation Plan</p> <p>Why do you think tactics escalate gradually?</p>   <hr/> <p>Resources that shrink as you use them.</p>  <hr/> <p>Resources that Grow as You Use Them</p>  |  |  | <p><i>Folks want to engage in things that fill them up! Many of the same old</i></p> <h2>10 minutes- Evaluating your tactics</h2> <p>You have 10 minutes. Look at your list of tactics.</p> <ul style="list-style-type: none"> <li>- Circle the ones that you think are strategic, when looking at these questions.</li> <li>- Cross out the ones that are NOT strategic.</li> </ul> <h2>2 Minutes – Compression Point Definition</h2> <p>Points on the calendar where you celebrate short term wins or escalate your tactics based on how you have assessed your readiness to escalate.</p> <ul style="list-style-type: none"> <li>◦ Naturally occurring deadlines</li> <li>◦ Artificial deadlines</li> <li>◦ Help us build urgency and crisis</li> </ul> <h2>2 Minutes – Turn and Talk</h2> <p>We keep saying that tactics should escalate gradually why do you think that is?</p> <h2>2 Minutes – Debrief</h2> <p>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</p> <h2>2 Minute – Just a word about resources</h2> <p>RESOURCES: Resources are what are available to the people who are part of the campaign to use to achieve their demand.</p> <p>Resources that shrink as you use them</p> <ul style="list-style-type: none"> <li>• Time/Energy</li> <li>• Tangible Items – materials</li> <li>• Money</li> </ul> <p>Resources that Grow as you use them</p> |  |
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| <p>Scenario Work!</p> <p>Building your Escalation Campaign</p> <p>STEP 1: Decide on your tactics</p> <p>Use the evaluation questions on Pg. 106</p> <p>STEP 2: Add in any compression points that are important to your campaign</p> <p>STEP 3: Build your tactics into an escalation campaign</p> <p>Use the campaign mountain on Pg. 110</p> <br><p>Key Points</p> <p>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.</p> <p>The bigger the win you want, the more resource you need.</p> <p>Good tactics actually result in more resources – relationships, skills, hope and trust.</p> |                                        |                                                                       | <ul style="list-style-type: none"> <li>• Relationships</li> <li>• Skills</li> <li>• Hope</li> <li>• Trust</li> </ul> <p><b>2 Minute on Key Points</b></p> <ul style="list-style-type: none"> <li>• Strategy without tactics is simply a collection of good ideas and big dreams.</li> <li>• Tactics without strategy are a random collection of activities and wasted resources.</li> <li>• The bigger the win you want, the more resource you need.</li> <li>• Good tactics actually result in more resources – relationships, skills, hope and trust.</li> </ul>                                                                     |                                                                                            |
| <p><b>10:55-11:30</b></p> <p><b>Barb</b></p>  <p>Team Work Time</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p>What does a campaign look like?</p> | <p><a href="#">Making a Plan (Labor Notes) Campaign Worksheet</a></p> | <p>Team Time to Complete a Campaign Plan Visual and prep to present to other teams.</p> <ul style="list-style-type: none"> <li>• STEP 1: Finalize the tactics you are going to use<br/>(Use the evaluation questions on Pg. 106)</li> <li>• STEP 2: Add in any compression points that are important to your campaign</li> <li>• STEP 3: Build your tactics into an escalation campaign<br/>(Use the campaign mountain on Pg. 110)</li> </ul> <p>You should build a chart with your campaign plan on it to present!</p> <p><i>Debrief-</i></p> <p><i>Have each group present their plan. Breakup as needed for time allowance.</i></p> | <p>Participants will practice creating a campaign plan with all the required elements.</p> |
| <p><b>11:30-12:00</b></p> <p><b>Barb</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p>What have we learned?</p>           | <p><a href="#">Team Coaching Handout</a></p>                          | <p><b>30 Mins Group Presentations</b></p> <p>Groups of Teams - following the guidance document, you will each present your plans</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                            |

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|  <p>Team Presentation and Coaching Time</p>                                                                                                                                             |                                      |                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  |
| <p><b>12:00- 1:00</b></p> <p><b>Ellen</b></p>  <p>Final Closing</p> <p>Lunch and Safe Travels!!!!</p>  | <p>Who do we remember and thank?</p> | <p><i>SET UP- Room with chairs in a circle. NEA support staff prepares the final certificates, and these are placed randomly under the seats</i></p> | <p><b>5 mins – FACILITATOR GRATITUDE/FAREWELL</b></p> <ul style="list-style-type: none"> <li>Presenters take a few minutes to give their gratitude/farewells to the group before transitioning to the circle.</li> </ul> <p><b>50 Mins -Celebration Circle</b></p> <p><i>SET UP- Room with chairs in a circle. NEA support staff prepares the final certificates, and these are placed randomly under the seats – leave seats without any certificates under them for the facilitators</i></p> <ul style="list-style-type: none"> <li>Tell participants to sit in a chair that has a piece of paper under it</li> <li>Ask people not to look at the paper under their chair until you tell them to.</li> <li>It is time to share gratitude for our time together and for each other. We came here as learners and leaving as a community that is still learning. Along the way, we have each had the opportunity to engage with everyone in the room.</li> <li>Please take the certificate from under your seat, read the name to yourself. IF you have gotten your own, raise your hand, and I will make the trades.</li> <li>As soon as someone is ready, they will volunteer to describe a memory from this week, a gratitude or some other positive affirmation about the person named on the certificate you are holding. The first person presents, and THAT person that was presented to, presents and so on. If there comes a time when there is a break – then just ask for another willing person to restart.</li> </ul> <p><b>5 Min. FINAL CLOSING</b></p> <ul style="list-style-type: none"> <li>Thank participants, bid them farewell, remind them of the and remind them to check in for other UniServ Development Opportunities.</li> </ul> |  |

**1:30****\*\*\*ADJOURN\*\*\***