

Participant Handouts

2022-23



What is the Foundations of UniServ Academy?

The Foundations of UniServ Academy is a five-day intensive classroom and worksite organizing experience led by practicing UniServ Directors and NEA field staff. Any UniServ Director with up to three years of experience is required to attend this to ensure that there is a consistent foundation of knowledge across the NEA UniServ workforce.

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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?

Welcome to NEA and the UniServ Program

NEA's Vision, Mission, and Values

Adopted at the 2006 NEA Representative Assembly

The National Education Association

We, the members of the National Education Association of the United States, are the voice of education professionals. Our work is fundamental to the nation, and we accept the profound trust placed in us.

Our Vision

Our vision is a great public school for every student.

Our Mission

Our mission is to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.

Our Core Values

These principles guide our work and define our mission:

1. **Equal Opportunity.** We believe public education is the gateway to opportunity. All students have the human and civil right to a quality public education that develops their potential, independence, and character.
2. **A Just Society.** We believe public education is vital to building respect for the worth, dignity, and equality of every individual in our diverse society.
3. **Democracy.** We believe public education is the cornerstone of our republic. Public education provides individuals with the skills to be involved, informed, and engaged in our representative democracy.
4. **Professionalism.** We believe that the expertise and judgment of education professionals are critical to student success. We maintain the highest professional standards, and we expect the status, compensation, and respect due all professionals.
5. **Partnership.** We believe partnerships with parents, families, communities, and other stakeholders are essential to quality public education and student success.
6. **Collective Action.** We believe individuals are strengthened when they work together for the common good. As education professionals, we improve both our professional status and the quality of public education when we unite and advocate collectively.

NEA also believes every student in America, regardless of family income or place of residence, deserves a quality education. In pursuing its mission, NEA has determined that we will focus the energy and resources of our 3.2 million members on improving the quality of teaching, increasing student achievement and making schools safer, better places to learn.

<http://www.nea.org/home/19583.htm>

Excerpts From the NEA UniServ Program Guidelines

Adopted by the NEA Board of Directors on September 28, 2019

I. STATEMENT OF PURPOSE

NEA believes that effective local affiliates are necessary in order to successfully recruit, organize, and represent members, and support the shared priorities of the local, state, and national associations embracing NEA's values of equal opportunity, racial and social justice, democracy, professionalism, partnership, and collective action to advance the interests of our members and their students. The National Education Association Unified Staff Service Program ("UniServ Program") is a cooperative NEA/NEA state affiliate/NEA local affiliate program that is designed to help establish and maintain effective local affiliates by making professional staff available to provide direct support and assistance to local affiliates and the Active members of such affiliates on an ongoing basis.

Effective local associations depend on achieving and maintaining high levels of member density [*Member density = number of members as a percentage of all eligible employees*]. Therefore, an essential component of the UniServ Program is membership growth (recruitment and retention) and membership engagement.

The UniServ Program is structured and operated pursuant to these Guidelines ("UniServ Program Guidelines").

XIV. TRAINING AND CAREER DEVELOPMENT

1. UniServ Staff

- a. The NEA UniServ Academy provides training for UniServ staff members in order to assist such staff members in effectively carrying out their job responsibilities. Every person who is employed for the first time as a UniServ staff member is required to participate in a training session at the NEA UniServ Academy once during the two (2) years immediately following the date on
- b. NEA will pay the costs (i.e., transportation, lodging, meals, and incidental expenses) incurred by UniServ staff members participating in the NEA UniServ Academy training session in accordance with the NEA Non-Staff and Travel Policy and Guidelines.
- c. The requirement of a newly hired UniServ staff member to participate in the NEA UniServ Academy training session may be waived by NEA if, in NEA's opinion, such training is unnecessary because of the newly hired UniServ staff member's previous experience or training.

"Shared responsibility to ensure all students, all educators, all schools are excelling, and everyone knows it."

Strategic Goals

To achieve our mission and to grow and strengthen our association to promote quality public education for students, educators, and America's schools, we the NEA will:

1. Enhance the well-being of America's students, their families, and their communities by **advancing opportunities** that will transform public education into a just, equitable, and excellent system.
2. Ensure the success of the public education system, our members, and those they serve by developing the structures, processes, and practices that **strengthen our organizational capacity** across the enterprise.



Strategic Objectives

In partnership with our Affiliates, NEA will:

Build Safe, Healthy, Inclusive, and Future-Focused Learning Environments: Support the development of modern, safe, and supportive learning environments that are affirming to all students and employees and resourced to meet the academic and developmental needs of today's students.

Support Professional Excellence and Respect: Enhance and maintain an enterprise-wide system of Association-convened, member-led professional learning and supports for all educators across their career continua to ensure student success, to diversify the professions, to continuously improve their professional skills, and to secure professional authority, collective autonomy, and compensation.

Advance Racial Justice and Social Justice: Support members in advancing racial justice and social justice in education and improving conditions for all students, families, and communities through awareness, capacity-building, partnership, and individual and collective action.

Strengthen Public Education as the Cornerstone of Democracy: Use all available means, including organizing, collective action, policy, legal, legislative, and electoral, to safeguard the rights of students, communities, and educators; to advance economic justice; to protect the future of public education; and to ensure that students are prepared in a learner centered environment to participate fully in our democratic society.

Enhance Professional and Organizational Regard: Enhance member and public recognition of the positive contributions of the NEA, its affiliates, and its members; demonstrate the value that the organization provides to educators, students, and communities; and the positive outcomes to the public education system when professionals are in union with one another.

Enhance Organizational Capacity

Develop and leverage the collective organizational proficiencies across our association to advance the mission of the NEA and its Affiliates, with particular focus on Member Engagement, Organizing & Connectedness; Educator Voice, Autonomy & Leadership; Racial Justice Culture; Coalitions & Partnerships; Dynamic Alignment; and Enterprise/Affiliate Health.

Enterprise Operations

Ongoing functions across the enterprise that support the Strategic Objectives, build lasting strength, and sustain the organizational infrastructure.



NEA UniServ Core Competencies

The NEA UniServ Core Competencies were first developed in 2013 by an Association-wide task force convened by the NEA Center for Organizing.

The Core Competencies inform NEA's UniServ training programs and provide a tool for state affiliates, affiliate field managers, and affiliate field staff.

In 2019, upon recommendation from the NEA Board of Directors' UniServ Advisory Committee, NEA's President charged the Committee with *"working with the NEA Center for Organizing to review and provide input to the revision of the UniServ Core Competencies to embed NEA's commitment to racial justice."*

In February 2020 the Committee met with NEA's Director of Human and Civil Rights for advice and guidance; and then worked in small groups to review, discuss and provide suggestions on revising the current Competencies.

The Center for Organizing invited UniServ Managers to provide input on revising the Competencies at its 2020 National UniServ Managers conference. C4O also asked a group of UniServ Directors to provide input: inviting fourteen affiliate field staff who were designing and leading NEA's national UniServ training program, including NEA's *Advancing Racial Justice through UniServ Work* courses and workshops, for their suggestions.

The proposed revisions represent a consolidation of all that input. They have been reviewed by NEA's Department of Human and Civil Rights, additional suggested changes were incorporated, and the resulting revised Guidelines were then reviewed and endorsed by the UniServ Advisory Committee.

The NEA Center for Organizing is pleased to release these revised UniServ Core Competencies. They embed NEA's commitment to racial justice and provide an improved road map for the skills and abilities that contribute to success as a UniServ Director.

NEA Center for Organizing

February 2021

For more resources from the NEA Center for Organizing, go to www.nea.org/C4O

SKILL LEVELS OF THE CORE COMPETENCIES

Level I Foundational At this level the competencies represent a basic knowledge and skills professionals may use to begin their practice in staff work.	Level II Transitional At this level the competencies represent a broad view of the knowledge and skills professionals use to develop their practice in staff work.	Level III Refining At this level the competencies represent a focused view of the knowledge and skills professionals may apply to refining their practice in staff work.
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1. CORE COMPETENCY – ORGANIZING

Skill Sets:

- Ability to apply organizing theories and philosophies to build strong local associations
- Ability to explain the relationship between organizing and power
- Ability to write an Organizing Campaign Plan that demonstrates an understanding of campaign messaging, elements of a successful action, last to first planning, and data analysis
- An understanding of one-on-one conversations
- Ability to identify, recruit, and develop emerging, diverse and representative leaders
- An understanding of issue and relational organizing
- An understanding of organizing tools, e.g. power mapping
- Ability to write an agenda and conduct effective meetings which lead to an end purpose for the meeting
- Ability to facilitate high level complex meetings
- Ability to train leaders and members with the necessary skills and tools to recruit and retain members
- Ability to work with leaders to implement an Organizing Campaign Plan
- An understanding of and demonstrated ability to conduct community and power mapping strategies
- Ability to plan actions that: expose and address inequity in systems; collaborate purposefully with representative and diverse individuals and groups (e.g. race, ethnicity, gender, sexual orientation, religion, ability, employment job category and other forms of identity); and work to create and support policies and practices that give rise to equitable outcomes

2. CORE COMPETENCY – ADVOCACY

Skill Sets:

- Ability to cultivate socially and racially just working environments through analysis, intentional actions, and measured outcomes
- An understanding of racial and social history and its existence and impact throughout systems, norms, policies and practices
- Ability to demonstrate knowledge of and loyalty and enthusiasm for the mission, vision, and core values of the NEA and state affiliate
- Ability to support and defend a cause particularly in the face of pressure and adversity
- Ability to bargain with others in order to reach a mutually acceptable agreement
- Ability to generate alternatives and select an appropriate solution to a problem
- Ability to think clearly and logically under pressure
- Ability to identify and obtain relevant information about an issue or problem
- Ability to facilitate discussion of issues and mediate issues and problems that arise between individuals or groups
- Ability to use organizing techniques to prepare locals for bargaining issues, policy issues, and legislative issues
- Ability to distinguish between grievances and/or organizing issues, whether or not they are mutually exclusive

3. CORE COMPETENCY – COMMUNICATION

Skill Sets:

- Ability to engage effectively and build strategic relationships with diverse people and groups (e.g., race, ethnicity, gender, sexual orientation, religion, ability, employment job category and other forms of identity)
- Speaks effectively, clearly communicates thoughts, ideas and information in groups, in one-on-one conversations and to the media
- Ability to maintain knowledge and skills in all aspects of electronic communications
- Uses effective listening skills by demonstrating attention to and conveying understanding of the ideas and opinions of others
- Ability to establish rapport with an audience and to express ideas to them in a clear and concise manner
- Ability to draft and demonstrate a presentation and an expression of ideas, both informally and formally, using written media

4. CORE COMPETENCY – PROJECT MANAGEMENT

Skill Sets:

- Ability to develop or adopt a system to track task and projects
- Ability to develop, manage, and complete projects
- Ability to build and develop diverse and representative (e.g., race, ethnicity, gender, sexual orientation, religion, ability, employment job category and other forms of identity) teams
- Ability to communicate changes and outcomes of a project
- Ability to facilitate the definition of project scope, goals and deliverables
- Ability to define project tasks and resource requirements
- Ability to develop project plans
- Ability to plan and schedule project timelines
- Ability to use technology to advance the project

5. CORE COMPETENCY – EDUCATION AND PROFESSIONAL ISSUES

Skill Sets:

- Ability to demonstrate an understanding of the patterns, trend and best practices regarding education policy
- Ability to demonstrate an understanding of employee evaluation policies and procedures, including the evaluation appeal process
- Ability to demonstrate an understanding of, advocacy regarding policies and strategies that impact education professions, student learning and advance racial justice in education
- Ability to demonstrate knowledge of statutes/policies covering teaching and learning topics
- Ability to demonstrate adult learning theory – how to work with and train members, leaders and community allies
- Ability to demonstrate advocacy for quality professional development
- Ability to apply a race equity lens to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just education policies, programs and practices





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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.

Core Values as a Work Life Balancer

Core values are the fundamental beliefs of a person. 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.

What are the core values that drive my work and life?

List as many or as few as you think is helpful. Reflecting on this question regularly can help keep you focused on “why” you do this work.

Work

Core Values can act like an anchor for us in our work. When we are unsure and feeling overwhelmed by what we are supposed to be doing, a good reflect and check is to ask, “does this align with my core values?”

Two good reflective questions to ask:

1. How am I living and working with integrity towards these values?
2. What can I do to improve that integrity?

For each of the core values you listed above, answer these two questions. This might help you identify areas that you could address and how you could address them.

Scoring and Understanding Your Leadership Style

What is Leadership?

The concept of leadership seems familiar enough. Yet defining the word precisely can prove challenging, perhaps because leadership is a concept rather than a thing. You cannot see it, or hear it, or touch it. How, then, can you begin to define leadership?

One good way to construct a definition is to list those things you must observe to know that leadership is occurring. To build a definition from the ground up, think of an empty stage. What do you need to place there for leadership to occur? Surely you need a leader. At the same time that you put a leader on stage, you must also put a follower there, for a leader can exist only in relation to a follower. What must occur between the two actors if leadership is present? The leader must influence the behavior of the follower. In what way? A leader influences a follower to achieve a predetermined goal. Now all the conditions are in place, and you can observe leadership in action.

What is Style?

Style can be defined as the way a person usually behaves when he or she is able to do things his or her own way. Often you can predict how someone whom you know well will behave in a given situation. Your hunches usually prove accurate because you have already observed a certain pattern in the other person's behavior. For example, think of someone with whom you work every day. You can probably predict how that person would act if he or she were in charge of a project. Your behavior as a leader follows recognizable patterns, too. *What's My Leadership Style?* Provides you with an opportunity to increase your awareness of your own behavior patterns, helping you to understand how your style manifests itself in the way you lead others.

Leadership + Style = Leadership Style

Put leadership and style together, and you get a definition of leadership style: *A person's unique way of influencing others to work toward goals.* Different people have different ways of influencing others. One leader may characteristically influence others to achieve goals by appealing to their sense of fun. Another leader may simply direct others to get down to business. Yet another leader may set out a detailed "road-map" for others to follow, while still another leader may provide encouragement and support as others work toward a goal. Your responses to the items in *What's My Leadership Style?* Reveal your own style of influencing others. Research demonstrates that style can best be understood by measuring the extent to which a person's typical behavior demonstrates *assertiveness* and *expressiveness*. Because we are measuring assertiveness and expressiveness in this assessment, we call these broad categories of behavior dimensions. Assertiveness describes the degree to which a person's behavior is forceful or directive. Highly assertive people like to take control of situations while less assertive people may be more comfortable in less visible roles. Expressiveness describes the degree to which a person's behavior is emotionally responsive or expressive. Highly expressive people like to show their emotions and from interpersonal relationships while less expressive people tend to keep their emotions to themselves. Combining the two dimensions produces four styles.

What's My Leadership Style? Response and Scoring Form

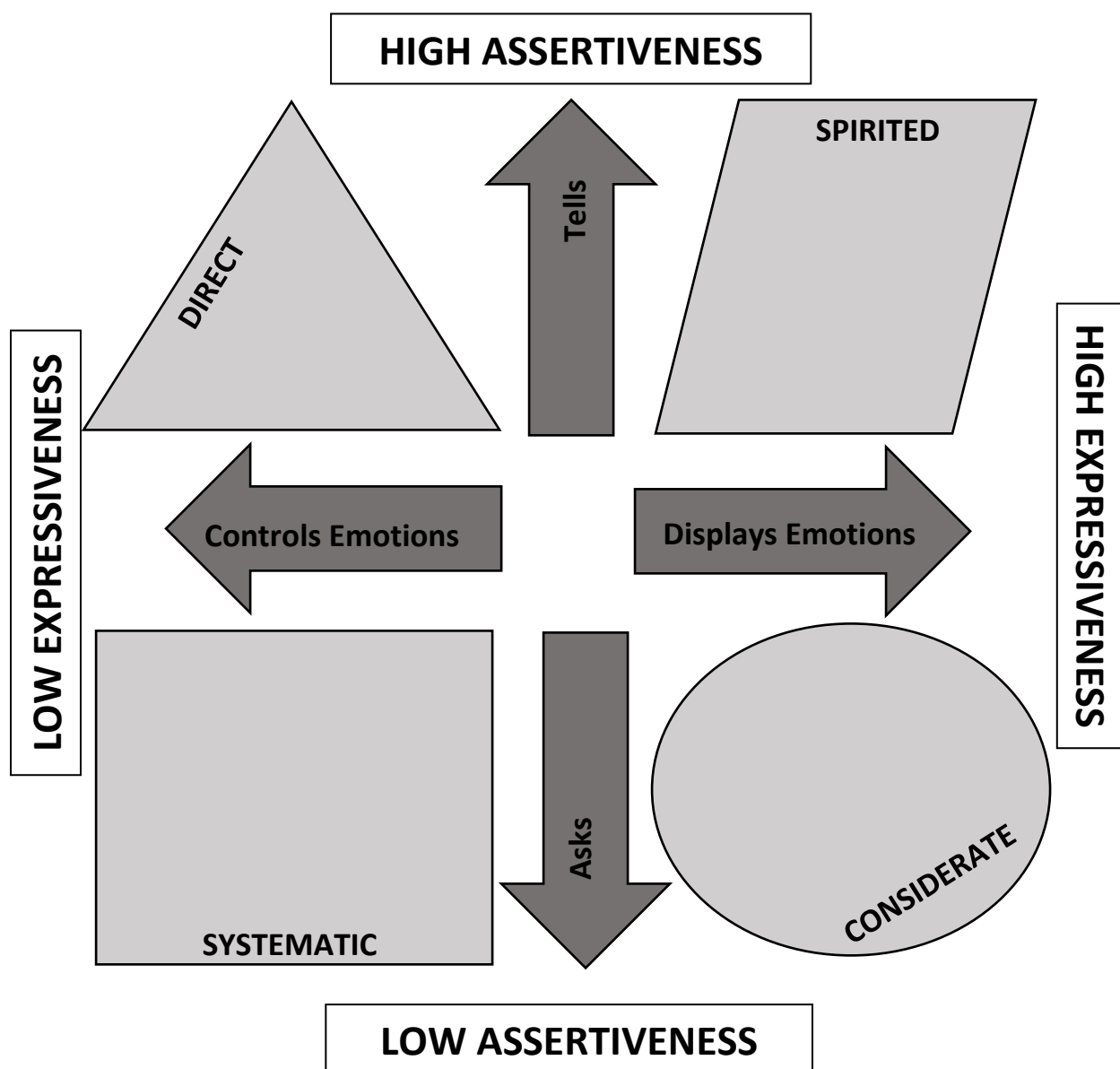
Directions: For each pair of leadership actions below, assign a total of 5 points by dividing the points between both actions. Use any combination that adds up to 5 points, but DO NOT USE FRACTIONS.

When getting others to work towards a goal, I am likely to...

		Equal to 5			
1.	Generate excitement.			Act decisively.	1.
2.	Take charge.			Offer guidance.	2.
3.	Provide encouragement.			Provide structure.	3.
4.	Point out omissions.			Seek everyone's input.	4.
5.	Emphasize goals.			Outline a sequence of steps.	5.
6.	Promote positive thinking.			Push to beat the competition.	6.
7.	Maintain a comfortable work space.			Get down to business.	7.
8.	Define tasks.			Require speed.	8.
9.	Direct others.			Create a free environment.	9.
10.	Listen to suggestions.			Provide challenges.	10.
11.	Plan things carefully.			Focus on the deadline.	11.
12.	Create a sense of urgency.			Spark creative thinking.	12.
13.	Offer inspiration.			Promote cooperation.	13.
14.	Monitor progress closely.			Improvise along the way.	14.
15.	Adopt a familiar approach.			Brainstorm new approaches.	15.
16.	Make it fun.			Set high standards.	16.
17.	Rally team spirit.			Show appreciation.	17.
18.	Demonstrate enthusiasm.			Analyze the situation first.	18.
19.	Request accuracy.			Foster teamwork.	19.
20.	Promote logical thinking.			Help out.	20.
Totals for Each Style					
Spirited 			Direct 		
Considerate 			Systematic 		

What's My Leadership Style? Response and Scoring Form Part 2

Directions: Copy the totals for each style from the previous page into the chart below. This is your leadership style profile.



Interpreting Your Score

Each of the four styles can be described based on the degree of assertiveness or expressiveness used.

Direct	High assertiveness, low expressiveness, leads by taking charge
Spirited	High assertiveness, high expressiveness, leads by inspiring
Considerate	Low assertiveness, high expressiveness, leads by building group harmony
Systematic	Low assertiveness, low expressiveness, leads by planning carefully

People generally develop a leadership style they are most comfortable using. That is their dominant style. Take a look at your Leadership Style Profile. Did you score higher than 16 on any style? If so, you probably prefer to use this style whenever you can. Did you score below 10 on any styles? These are probably leadership styles that you do not use often. Some people have one clearly dominant style. Those people generally use that style to the exclusion of others. Other people may use a variety of styles. They would have a relatively even distribution of points in their Leadership Style Profiles.

Is There a Best Leadership Style?

In a word, no. Current theory suggests that different situations require different leadership styles. In fact, the most important take-away from this assessment is this: *The most effective leaders are the ones who adapt their styles to the requirements of the situation.* Leadership Style Effectiveness shows the strengths and weaknesses of different leadership styles depending on the situation.

Direct • Produces quick results • Gets people moving • Takes charge no matter how challenging MOST EFFECTIVE in crisis situations or rapidly changing situations in which bold action and quick decisions are needed. LESS EFFECTIVE in situations requiring careful planning and in situations requiring tact and sensitivity to other's feelings.	Spirited • Inspires others to develop fresh, new approaches • Create a fun atmosphere by acting spontaneously • Rallies support MOST EFFECTIVE in situations in which people need to be motivated to develop fresh innovative ideas. LESS EFFECTIVE in urgent situations in which deadlines must be met and in situations in which long-term planning is vital.
Systematic • Makes decisions based on facts • Asks for specific details • Is analytical MOST EFFECTIVE in situations calling for careful, long-term planning, accuracy and objective analysis. LESS EFFECTIVE in situations requiring quick decision-making or flexibility because of ambiguity or interpersonal conflict.	Considerate • Listens actively • Works cohesively • Considers others' feelings MOST EFFECTIVE in sensitive situations requiring patience, tact, and diplomacy. LESS EFFECTIVE in situations requiring quick adjustments because of unforeseen changes and situations in which the need to take charge of others is crucial.

Too Much of a Good Thing?

You probably find yourself most comfortable leading others in those situations in which your dominant style is most effective. But sometimes you may need to move outside of your comfort zone so that you can adapt your style to the demands of a particular situation. Otherwise, your leadership style strengths may become weaknesses. Each style has definite strengths. However, some strengths, when taken to an extreme, can become weaknesses.

DIRECT

Direct leaders, when stressed, may cross the line from taking charge to being overbearing.

Direct leaders, like to get things done quickly, which is usually a plus. However, if some of their followers work at a slower pace, they may feel pressured by their direct leader's drive. In addition, direct leader's sense of urgency may cause them to be reluctant to delegate.

Direct leaders like to compete, which may give their organizations an edge over others. However, taken to extremes, their competitive spirit may intimidate those they lead.

Direct leaders work hard. But when they expect the same high-octane performance from those they lead, they may cause their followers to burn out.

SYSTEMATIC

Systematic leaders provide structure for activities, which usually helps tasks or projects progress without a hitch. However, when systematic leaders impose too much structure, their followers may chafe under so much control.

Systematic leaders make sure that no one overlooks the important details. But taken to the extreme, their conscientiousness may make the people they lead feel bogged down.

Systematic leaders make sure that all the data is in before making decisions, which is usually a sound policy. However, when urgent situations call for quick action, systematic leaders' thoroughness may be counterproductive.

Systematic leaders insist on objectivity and accuracy above all else. As a result, those they lead may view them as impersonal or picky.

SPIRITED

Spirited leaders are good at generating enthusiasm among their followers. Yet taken to an extreme, their persuasive abilities may become manipulative.

Spirited leaders know how to prompt those they lead to develop fresh new approaches. However, their emphasis on thinking of new ways to do things sometimes comes at the expense of making sure that things are carried through to completion.

Spirited leaders inspire their followers by providing them with a vision. But in presenting the big picture, they may sometimes gloss over the important details.

Spirited leaders enjoy motivating their followers from center stage, but sometimes they forget that they also need to provide their followers with an audience, by listening to them.

CONSIDERATE

Considerate leaders provide their followers with a sense of reassurance when times are difficult or rapidly changing. However, their desire to keep things comfortable by keeping them the same may cause them to resist change, rather than helping their followers adapt to it.

Considerate leaders build a loyal following by demonstrating their support for others. However, some of their followers may view their support as permissiveness.

Considerate leaders recognize the importance of taking their followers' views into account. But taken to an extreme, their willingness to accommodate others' views may cause them to cave in or appear to cave in.

Considerate leaders are good at maintaining team harmony, but, in some cases, their desire to maintain harmony may cause them to avoid constructive conflict.

The Bottom Line

Current research shows that people representing all four behavioral styles can and do function effectively as leaders. Here is the bottom line: Rather than asking yourself, "Do I have what it takes to be a leader?" it is far more productive to ask yourself, "What does this particular situation require from me?" Then you will be able to decide whether you need to adjust your leadership style, and, if so, how?

Action Planning

Now that you have identified your own leadership style, how can you put it to work? Use the following questions to guide your thinking.

1. Based on the information you obtained from this assessment, what do you view as your personal strengths as a leader?
2. What are your areas for improvement as a leader?
3. Think of a specific situation in which you will need to influence others to accomplish a goal. What strengths can you use to your advantage? How do you plan to adapt your leadership style to meet the requirements of the situations.

Expressions of Racism

<i>Individual</i>	
Internalized Racism lies within individuals. These are our private beliefs and biases about race and racism, influenced by our culture.	Interpersonal Racism occurs between individuals. Once we bring our private beliefs about race into our interactions with others, we are now in the interpersonal realm.
<i>Systemic</i>	
Institutional Racism occurs within institutions and systems of power. It is the norms, policies and practices that are structured into political, societal and economic institutions that have the net effect of imposing oppressive conditions and denying rights, opportunity, and equality to identifiable groups based upon race or ethnicity.	Structural Racism is racial bias across institutions and society. It's the cumulative and compounded effects of an array of factors that systematically privilege white people and disadvantage people of color.

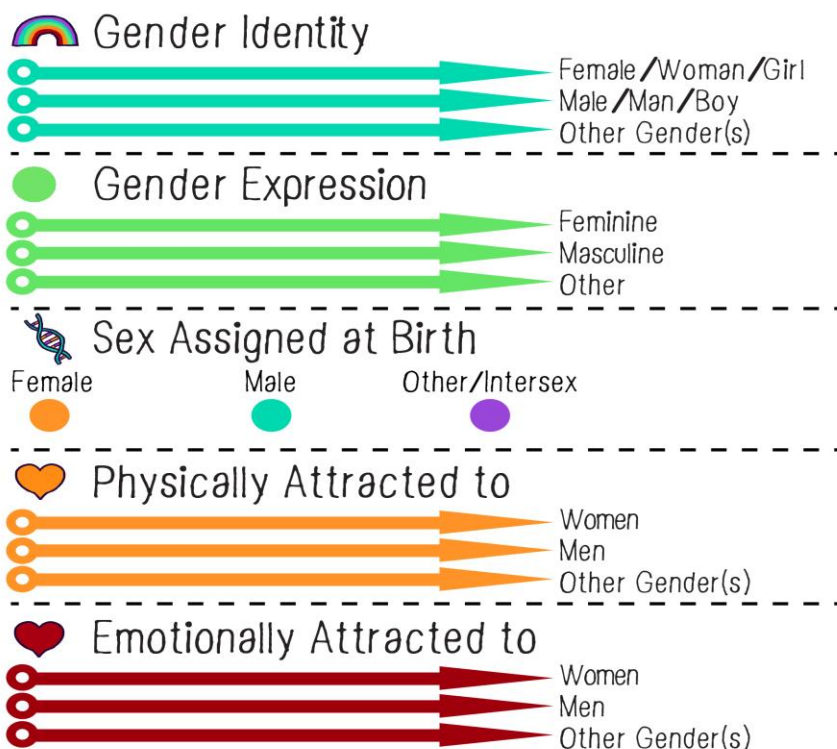
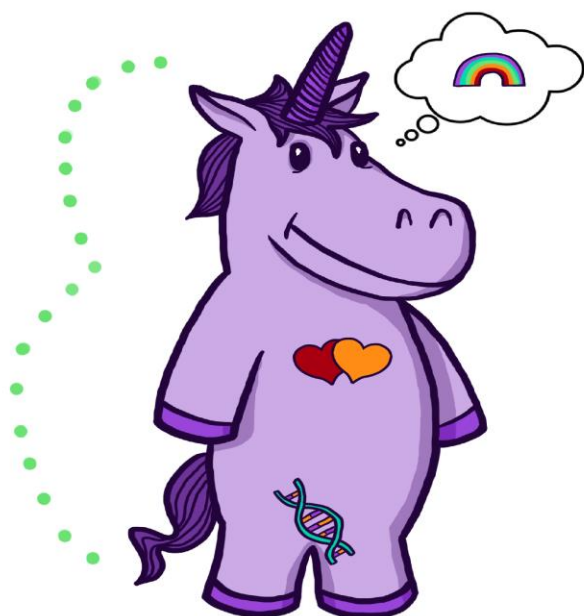
Key Points to Remember

Key Point 1 - There are not hard and fast lines between the levels - and changing one can affect another.

Key Point 2 - The way to effect change is by addressing institutional and structural racism - this is where injustice lives.

The Gender Unicorn

Graphic by:
TSER
Trans Student Educational Resources



To learn more, go to:
www.transstudent.org/gender

Design by Landyn Pan and Anna Moore

Gender Unicorn Definitions



Gender Identity: *How I identify.*

One's internal sense of being male, female, neither of these, both, or another gender(s). For transgender people, their own internal sense of gender identity and their sex assigned at birth are not the same.



Gender Expression/Presentation: *How I look and express myself.*

The physical manifestation of one's gender identity through clothing, hairstyle, voice, body shape, etc. Most transgender people seek to make their gender expression (how they look) match their gender identity (who they are), rather than their sex assigned at birth.



Sex Assigned at Birth: *The sex classification that I was assigned at birth.*

The assignment and classification of people as male, female, intersex, or another sex based on a combination of anatomy, hormones, and chromosomes. This is usually decided at birth or in utero, and is usually based on genitalia.



Sexually Attracted To: *Whom I am sexually attracted to.*

The group of people or genders to which a person can become sexually attracted to, if at all.



Romantically/Emotionally Attracted To: *Whom I am romantically/emotionally attracted to.*

The group of people or genders to which a person can become romantically, emotionally, or spiritually attracted to, if at all.

Examples of Genders: We included "other genders" to indicate the many genders that other people might identify as, express themselves as, and be attracted to. Examples of these genders include: Agender, Bigender, Genderfluid, Genderqueer, Transgender, Non-binary, Gender Non-Conforming and Two-Spirit.

Everyday Racism in Union Work

We will be working on this scenario in a breakout session with others. Prior to our meeting, it would be helpful for you to familiarize yourself with the story.

Angel is a newly hired Educational Support Professional (ESP) at Rolling Seas Elementary School – a school that they attended as a child. They are an instructional aide in the special education resource room. This school is known for high poverty, large class sizes, and a high number of English language learners. Angel was the first person in their family to get a degree from the community college. Several generations of Angel's family are all from this community. Angel wanted to continue on at state college to become a certified teacher of students with special needs, but the cost of school was too much. They are a parent who works a second job to earn enough money to eventually move out of their mother's apartment. They are grateful for their family's overall support but wants their own place. Compounding the household budget issues, Angel's child fell off their trike a few years ago resulting in huge, uninsured medical bills. Despite working to pay them off, several are in collection, which is affecting Angel's applications for rental agreements.

Upon meeting the Lead Teacher, Phyllis, Angel is immediately complimented on how well they speak and their lovely, long hair. Phyllis makes sure to discuss how supportive they are of undocumented families and how Angel should feel comfortable in this room with them. As Angel helps Phyllis set up the room for the first day of school, they notice that for any child who has a "different" sounding name, Phyllis puts a bright yellow name sign on the child's desk. Curious, Angel asks about this. Phyllis lets Angel know that these students probably don't speak English and will always come to class without lunch money. All the teachers in the special education program use this as a signal for the lunch accountability tally. "It is just easier that way," says Phyllis.

Later in the day, the conversation turns to getting to know one another and Phyllis asks Angel, "What made you want to be an instructional aide?" Angel shares their story and their aspirations to get a teaching certificate. Phyllis does not have the heart to tell Angel that this dream will likely never come true. There are no reimbursements for professional development for ESP members in the district, and most of the courses required for the full certification program are at the state college in the evening. Phyllis just knows that people like Angel would never be able to overcome the issues of child-care, transportation and added debt, so they don't mention it. "It wouldn't be nice to get their hopes up," thinks Phyllis.

Angel is approached by Carol, the Union's Building Representative (a classroom teacher), and Carol asks them to join the local union. Angel asked about the cost, and Carol responded by saying, "Support staff don't pay much considering all that we have to do for you people. We used to be separate organizations. Now, I think we're more focused on professional issues instead of what matters. The dues are described in this flyer." Carol left a folder of information and a business card of a man that she said worked for the Union. He would help Angel when they got into trouble. Angel asked, "Are there any programs for getting a teaching certification?" "I'll check," says Carol. Angel took the information, but no one ever came to talk to them from the union again. They would have loved to know how to get professional development. Angel called the union office once, and when they asked for information was immediately told they had to be a member first and that they needed to contact the building rep or UniServ Director. "All I wanted was information," they thought, "and all I got was sent back to the people that did not contact me. I guess they really don't want people like me."

As the year went on, and Angel got to know more classroom teachers and instructional aides, they noticed that most of the classroom teachers were people who did not live in the neighborhood around the school, and that most of the instructional aides lived in the school's neighborhood or very close by. At lunch one day Angel shared with their co-worker and neighbor, Elise, their aspirations for becoming a classroom teacher. Overhearing their conversation, Becky, a new classroom teacher, shared her story. "I started here on a conditional certification with only a two-year degree. All I had to do was agree to get my four-year degree in the next three years. I love the state college, my colleagues in the second-grade wing watch my classroom so I can make the evening classes, and we have a babysitter who watches my son in the evenings while I am at class. It is an upfront investment, and the district reimburses up to nine credits a year. I just don't know why more of you don't take advantage of this!"

Analyzing Different Expressions of Everyday Racism

Answer the five questions below. In each box, list examples of expressions of racism you think are occurring in the story you just read. You don't have to identify every possible example because it's important to leave ample time for the last question.

1. Is Angel thriving in their institutions(school/union)? What are examples from the story that leads you to this conclusion?	2. What are examples of Systemic Racism (racism within institutions and across systems of power)?
3. What are examples of Individual Racism (racism between individuals)?	4. What race and gender is Angel? What evidence from the story leads you to these conclusions?

5. As a UniServ Director, what is your role in interrupting the instances of racism that you recognize?



STORY OF SELF, US and NOW

“Why am I called to lead?”

“Who are we together?”

“Why do we need to act now?”

PUBLIC NARRATIVE: STORY OF SELF

EACH OF US HAS A COMPELLING STORY TO TELL

Each of us has a story that can move others to action. As you learn this skill, you will be learning to tell a story about yourself, the community you organize with, and your strategy that motivates others to join you in creating change. In addition, you will gain practice in listening, and coaching others to tell a good story.

PUBLIC NARRATIVE IS A PRACTICE OF LEADERSHIP

Leadership is about accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty. Narrative is how we learn to make choices and construct our identities and purpose—as individuals, as communities and organizations, and as nations.

What does public narrative have to do with this definition of leadership? You can't ask others to follow you if they don't understand what your intentions are, and why you are called to lead.

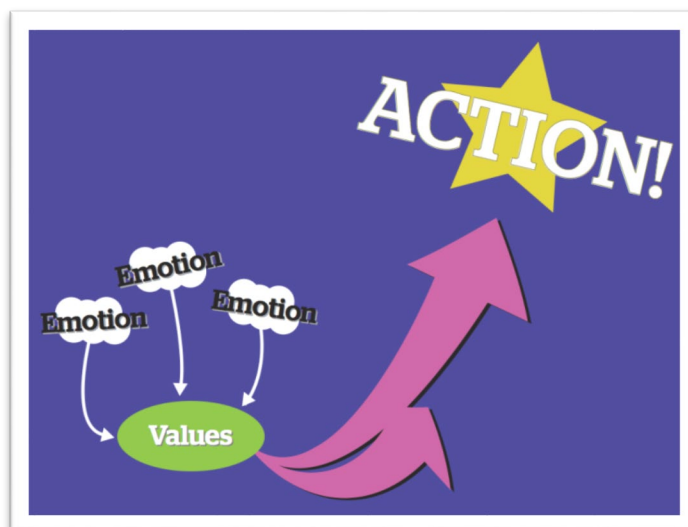
THE HEAD & THE HEART



There are two ways we understand the world: through our head (strategy & analysis) and through our heart (story & motivation). To enable others to achieve shared purpose, public leaders must employ BOTH the head and the heart of their constituency in order to mobilize others to act on behalf of shared values. In other words, they engage people in interpreting why they should change their world (their motivation) and how they can act to change it (their strategy). Public narrative is the “why”: the art of translating values into action through stories.

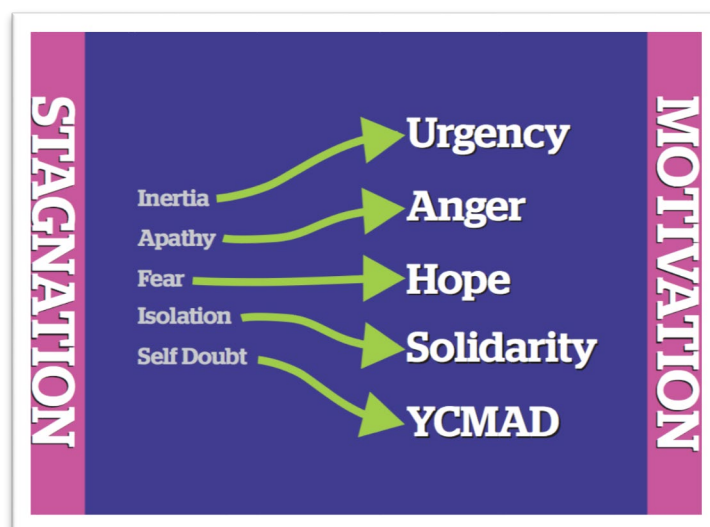
VALUES INSPIRE ACTION THROUGH EMOTION

We don't think our values; we feel our values. Often we don't realize what we value in the world until we hear a story or witness an injustice that stirs emotions within us. Emotions inform us of what we value in ourselves, in others, and in the world, and they enable us to express the motivational content of our values to others. Because stories allow us to express our values not as abstract principles, but as lived experience, they have the power to move others to action.



SOME EMOTIONS INHIBIT ACTION, OTHERS MOTIVATE ACTION

Public leaders often encounter individuals or groups where mindful action is inhibited by inertia, fear, self-doubt, isolation, and apathy. The job of a leader is not to tell people to stop feeling this way but rather use storytelling to move people from feelings of stagnation to feelings of motivation: urgency, hope, YCMAD (you can make a difference), solidarity, and anger. The language of emotion is the language of movement: they actually share the same root word. Stories mobilize emotions of action to overcome emotions that inhibit us from mindful action.



PUBLIC NARRATIVE COMBINES A STORY OF SELF, US AND NOW



STORY OF SELF By telling a “story of self” you can communicate the values that move you to lead. Public leaders face the challenge of enabling others to “get” the values that move them to lead. Effective communication of motivating values can establish grounds for trust, empathy, and understanding. In its absence, people will infer our motivations, often in ways that can be very counterproductive. Telling our story of self can help establish firm ground for leadership, collaboration and discovering common purpose.

Every one of us has a compelling story of self to tell. We all have people in our lives (parents, grandparents, teachers, friends, colleagues) or characters we love, whose stories

influence our own values. And we all have made choices in response to our own challenges that shape our life’s path: confrontations with pain, moments of hope, calls to action.

The key focus is on our choices, those moments in our lives when our values moved us to act in the face of challenge. When did you first care about being heard? When did you feel you had to act? Why did you feel you could act? What were the circumstances, the place, the colors, the sounds? What did it look like? The power in your story of self is to reveal something of those moments that were deeply meaningful to you in shaping your life; not your deepest private secrets, but the events that shaped your public life. Learning to tell a good story of self demands the *courage of introspection*, and of sharing some of what you find.

STORY OF US

By telling a “story of us” you can communicate values that can inspire others to act together by identifying with each other, not only with you.

Just as with a story of self, key choice points in the life of a community: its founding, crises it has faced, or other events that everyone remembers are moments that express the values shared. Consider stories that members of your group have shared, especially those that held similar meaning for all of you. The key is to focus on telling a specific story about specific people at a specific time that can remind everyone, or call to everyone's attention, values that you share. Telling a good story of us requires the *courage of empathy* to consider the experience of others deeply enough to take a chance at articulating that experience.

STORY OF NOW

By telling a “story of now” you can communicate an urgent challenge we are called upon to face, the hope that we can face it, the hopeful outcome we can create together, and the choice we must make to act now.

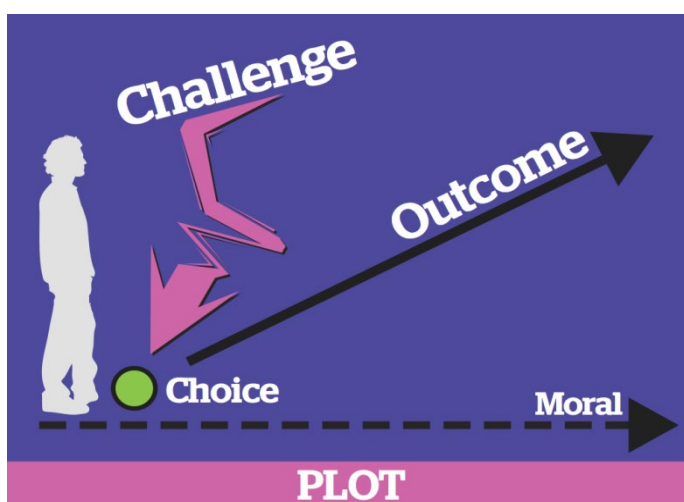
A story of now requires telling stories that bring the urgency of the challenge alive: urgency because of a need for change that cannot be denied, urgency because of a moment of opportunity that may not return. A story of now also offers hope, not make-believe hope, but real, plausible hope, often grounded in what others are already achieving, grounded in the courage of others' actions, and in the strategic vision of what we can achieve together. At the intersection of the urgency and the promise of hope is a choice that must be made to act, or not to act, to act in this way, or in that. Telling a good story of now requires the *courage of imagination*, or as Walter Brueggemann named it, *a prophetic imagination*, in which you call attention both to the pain of the world and also to the possibility for a better future.

STORY STRUCTURE: CHALLENGE, CHOICE, OUTCOME

Every human story has a plot. A plot begins with a challenge that confronts a character with an urgent need to pay attention, to make a choice for which they are unprepared. The choice yields an outcome, and the outcome teaches a moral.

A good story allows the listener to empathetically identify with the character and “feel” the moral. We hear “about” someone's courage; we are also inspired by it.

The story of the character and their choices encourages listeners to think about their own values and challenges and inspires them with new ways of thinking about how to make choices in their own lives.



Incorporating Challenge, Choice, and Outcome in Your Own Story

There are some key questions you need to answer as you consider the choices you have made in your life and the path you have taken that brought you to this point in time as a leader. Once you identify the specific *relevant* choice, dig deeper by answering the following questions.

Challenge: Why did you feel it was a challenge? What was so challenging about it? Why was it your challenge?

Choice: Why did you make the choice you did? Where did you get the courage (or not)? Where did you get the hope (or not)? Did your parents or grandparents' life stories teach you in any way how to act in that moment? How did it feel?

Outcome: How did the outcome feel? Why did it feel that way? What did it teach you? What do you want to teach us? How do you want us to feel?

A word about challenge. Sometimes people see the word challenge and think it means describing the worst misfortunes of our lives. Sometimes those are the moments that most shaped us. But keep in mind that a struggle might also be one of your own choosing: a high mountain you decided to climb as much as climbing out of a valley. Many things may have been a challenge to you and can be the source of a good story to inspire others.

VIDEO REVIEW

SAMPLE STORY OF SELF, US, AND NOW

We'll be watching a sample story of Self, Us and Now. While you watch it, think about the elements of SELF – US – NOW that you hear in this story.

SELF	US	NOW
• <i>What experiences and values call this person to leadership?</i> • <i>What choice points does the speaker include to show, rather than tell us about their values?</i>	• <i>Who is the “us” that the speaker identifies?</i> • <i>What are the common values the speaker appeals to? How?</i> • <i>What challenges and hopes does this “us” or community share?</i>	• <i>What urgent challenge does this speaker identify?</i> • <i>How does the speaker make that challenge real?</i> • <i>What gives us real hope that we can do something?</i> • <i>What is the first step that each person can take to be part of the solution?</i>

1. What was the speaker’s purpose in telling these stories? What were they moving people to do?
2. What values did this story convey? How? By telling or showing?
3. What details or images in particular reflected those values?
4. What were the challenges, choices and outcomes in each part of the story? What morals do the outcomes teach?

WORKSHEET

Instructions:

Write your story of self and include 2-3 sentences of your story of us and your story of now in a separate word document. It should be no longer than 2 minutes when reading it aloud. Use the Public Narrative Guide to craft your narrative. You will be using your public narrative in your plan presentation.

For this exercise you will focus primarily on your **story of self**, however, public narrative is not just a form of self-expression. It is a way to exercise leadership by motivating others to join you in action on behalf of a shared purpose. Although we will focus on your **story of self**, this worksheet will start to get you thinking about your story of us and story of now as well. The goal is to identify your own motivations, or values, for why you have been called to leadership, because soon you will be calling on others (story of us) to join you in action (story of now). Public narrative is about learning a process, not writing a script. It can be learned only by telling, listening, reflecting, and telling it over and over again. This worksheet is to help you begin.

1. A story of now: What urgent challenge are you calling on others to join you in facing. What is the source of hope that action could be fruitful? What action can they take together to achieve a clear outcome? And how can they begin now, at this moment? **Spend about 5 minutes thinking about and writing down your story of now in only 2-3 sentences.**

2. A story of us: Who is the “us” that you will call upon? What shared values, experiences, or hopes will you draw upon when you ask them to join you in action? What stories can you share that express these values? **Spend about 5 minutes thinking about and writing down your story of us in only 2-3 sentences.**

3. A story of self: You should spend most of your time focusing on this part of your story for this assignment. Why were you called to take leadership on this urgent challenge? Why do you care? Why do you care enough to act? Why do you care enough to lead? Where did you get the hope? What were the key choice points that set you on your path? What stories can you share that will enable us to experience sources of your caring and your hope, moments that moved you, that will enable us to “get you”? Invest most of your time in this section. Use the following worksheets to help guide you.

DEVELOPING YOUR STORY OF SELF

WHAT ARE THE SOURCES OF YOUR OWN CALLING?

WHAT CRITICAL CHOICES POINTS CAN YOU RECALL?

WHAT STORIES CAN YOU TELL ABOUT THESE CHOICE POINTS?

Before you decide what part of your story to tell, think about these questions:

1. What will I be calling on others to do?
2. What values move me to act and might also inspire others to take action?
3. What stories can I tell from my own life about specific people or events that would show (rather than tell) how I learned or acted on those values?

What are the experiences in your life that have shaped the values that call you to participate?

What are the experiences in your life that have shaped the values that call you to leadership in this campaign?

FAMILY & CHILDHOOD

Parents/Family

Growing up

Your community

Role models

School

LIFE CHOICES

School

Career

Partner/Family

Hobbies/Interests/Talents

Finding passion

Overcoming challenge

ORGANIZING EXPERIENCES

First experience of organizing

Connection to key books or people

Role models

Think about the challenge, choice and outcome in your story. The outcome might be what you learned, in addition to what happened. *Try drawing pictures here instead of words.* Powerful stories leave your listeners with images in their minds that shape their understanding of you and your calling.

CHALLENGE	CHOICE	OUTCOME

For Further Reflection:

STORY OF SELF

We all live very rich, complex lives with many challenges, many choices, and many outcomes of both failure and success. That means we can never tell our whole life story in two minutes. The challenge is to learn to interpret our life stories as a practice, so that we can teach others based on reflection and interpretation of our own experiences. We should choose stories to tell from our own lives based on what's appropriate in each unique situation.

Take time to reflect on your own public story, beginning with your story of self. You may go back as far as your parents or grandparents, or you may start with your most recent organizing and keep asking yourself why you got involved when you did. Focus on challenges you had to face, the choices you made about how to deal with them, and the satisfactions or frustrations you experienced. Why did you make those choices? Why did you do this and not that? Keep asking yourself why.

What did you learn from reflecting on these moments of challenge, choice, and outcome? How do they feel? Do they teach you anything about yourself, about your family, about your peers, your community, your nation, your world around you, and about what really matters to you? What about these stories was so intriguing? Which elements offered real perspective into your own life?

Many of us active in public service have stories of both loss and hope. If we did not have stories of loss, we would not understand that loss is a part of the world, and we would have no reason to try to fix it. But we also have stories of hope, otherwise we wouldn't be trying to fix it.

A good public story is drawn from the series of choice points that have structured the "plot" of your life – the **challenges** you faced, **choices** you made, and **outcomes** you experienced.

Challenge: Why did you feel it was a challenge? What was so challenging about it? Why was it *your* challenge?

Choice: Why did you make the choice you did? Where did you get the courage or not? Where did you get the hope or not? How did it feel?

Outcome: How did the outcome feel? Why did it feel that way? What did it teach you? What do you want it to teach us? How do you want us to feel?

In the end, you will be asked to **link your story of self, story of us, and story of now into a single public narrative.**

As you will see, however, this is an iterative, non-linear process. Each time you tell your story, you will adapt it to make yourself clearer, to adjust to a different audience, or to locate yourself in a different context. As you develop a story of us, you may find you want to alter your story of self, especially as you begin to see the relationship between the two more clearly. Similarly, as you develop a story of now, you may find it affects what came before. And, as you go back to reconsider what went before, you may find it alters your story of now. You will not leave with a final "script" of your public narrative, but you will learn a process by which you can generate that narrative over and over and over again when, where, and how you need to.

COACHING TIPS:

STORY OF SELF

Remember to balance both positive and constructive critical feedback. The purpose of coaching is to listen to the way stories are told and think of ways that the storytelling could be improved.

DON'T simply offer vague “feel good” comments. (“That was a really great story!”)

DO coach each other on the following points:

- ☒ **THE CHALLENGE:** What were the specific challenges the storyteller faced? Did the storyteller paint a vivid picture of those challenges?

“When you described _____, I got a clear picture of the challenge.”

“I understood the challenge to be _____. Is that what you intended?”

- ☒ **THE CHOICE:** Was there a clear choice that was made in response to each challenge? How did the choice make you feel? (Hopeful? Angry?)

“To me, the choice you made was _____, and it made me feel _____.”

“It would be helpful if you focused on the moment you made a choice.”

- ☒ **THE OUTCOME:** What was the specific outcome that resulted from each choice? What does that outcome teach us?

“I understood the outcome was _____, and it teaches me _____. But how does it relate to your work now?”

- ☒ **THE VALUES:** Could you identify what this person’s values are and where they came from? How? How did the story make you feel?

“Your story made me feel _____ because _____.”

“It’s clear from your story that you value _____; but it could be even clearer if you told a story about where that value comes from.”

- ☒ **DETAILS:** Were there sections of the story that had especially good details or images (e.g. sights, sounds, smells, or emotions of the moment)?

“The image of _____ really helped me identify with what you were feeling.”

“Try telling more details about _____ so we can imagine what you were experiencing.”

As You Listen to Your Colleagues:

STORY OF SELF

As you hear each other's stories, keep track of the details of each person's story to help you reflect and provide feedback and remember details about people on your team later. Use the grid below to track your team's stories in words or images.

NAME	VALUES	CHALLENGE	CHOICE	OUTCOME

ACKNOWLEDGEMENTS

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below. This workshop guide has been developed over the course of many trainings by Liz Pallatto, Joy Cushman, Jake Waxman, Devon Anderson, Rachel Anderson, Adam Yalowitz, Kate Hilton, Lenore Palladino, New Organizing Institute staff, MoveOn Organizers, Center for Community Change staff, Jose Luis Morantes, Carlos Saavedra, Sean Thomas-Breitfeld, ShuyaOhno, Petra Falcon, Michele Rudy, Hope Wood, Kristen Dore and many others.

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NEA's 2022-23 Narratives

Strategic Vision	Meta Narratives: NEA's "Why"	Priority Narrative Themes: "Together our voice is stronger to..."
Overall Vision: NEA will unite our members and the nation to lead a movement to reclaim public education as a common good, as the foundation of our democracy, and transform it into a racially and socially just and equitable system that prepares every student to succeed in a diverse and interdependent world.	We promote diversity and inclusiveness — to be anti-racist champions for our students.	Create racially and socially equitable schools that gives every student - black or white, gay or straight, rich or poor - the freedom to be who they are and prepare for their future.
Vision For Students: Every student is supported in, and prepared for, their next journey – grade; level; career; college; civic responsibility; leadership, so they can...“fulfill their full potential as empowered individuals, constructive members of their communities, productive participants in the economy, and engaged citizens of the US and the world.”	Our students are at the heart of what we do—they come first.	Create nurturing & thriving learning environments as we unite for safe, supportive workplaces for every educator.
Vision for Educators (Pt 1): Every educator is supported in professional authority, rights, and professional compensation.	We ensure positive and safe working conditions — so educators can best serve today’s students.	Claim a seat at the table to ensure we recruit & retain the best educators by giving them the fierce support & professional wages they deserve to foster student success.
Vision for Educators (Pt 2): Every educator is supported in, and continuously prepared for professional excellence throughout their career continuum (including collective autonomy, collaborative practice, advancing and leading their profession)	We prepare for tomorrow — by providing resources and training to help educators excel in their careers and support the success of their students.	Harness the power of educators to inspire professional excellence and support each other as we cultivate the quality and diversity of our professions.
Vision for Schools & Communities: Every school is supported by their parents/families, community and local/state/national governments; they reflect the aspirations of their community and contribute to its success.	We act for a better tomorrow— by organizing and advocating for students and workers at the local, state, and national level.	Elections matter for students. We must be heard at the ballot box, seen in the halls of power, & respected as leaders in our community so we can protect our freedoms, democracy, & rights.

Reflections, Connections and Notes for Later

Participant Handouts

Day 2



What is the Foundations of UniServ Academy?

The Foundations of UniServ Academy is a five-day intensive classroom and worksite organizing experience led by practicing UniServ Directors and NEA field staff. Any UniServ Director with up to three years of experience is required to attend this to ensure that there is a consistent foundation of knowledge across the NEA UniServ workforce.

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Thinking about Power

Quotes on Leadership	Your Connections and Thoughts
Power can be taken, but not given. The process of the taking is empowerment in itself. <i>-Gloria Steinem</i>	
I believe to be a leader is to enable others to embrace a vision, initiative or assignment in a way that they feel a sense of purpose, ownership, personal engagement, and common cause. <i>-Melanne Verveer</i>	
Organizing is first of all an attitude. It's the attitude that you and others together can DO SOMETHING to make things better. It's the attitude that action is better than complaining. It's the attitude that problems are just waiting for a solution, and that strength in numbers is part of that solution. It's the refusal to be discouraged – at least not for long. It's the willingness to listen to others with respect, so that the plan you come up with reflects the good ideas of many people. <i>– Labor Notes, Secrets of a Successful Organizer</i>	
This is the basic difference between the leader and the organizer. The leader goes on to build power to fulfill his desires, to hold and wield the power for purposes both social and personal. He wants power himself. The organizer finds his goal in creation of power for others to use. <i>– Saul Alinsky</i>	

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

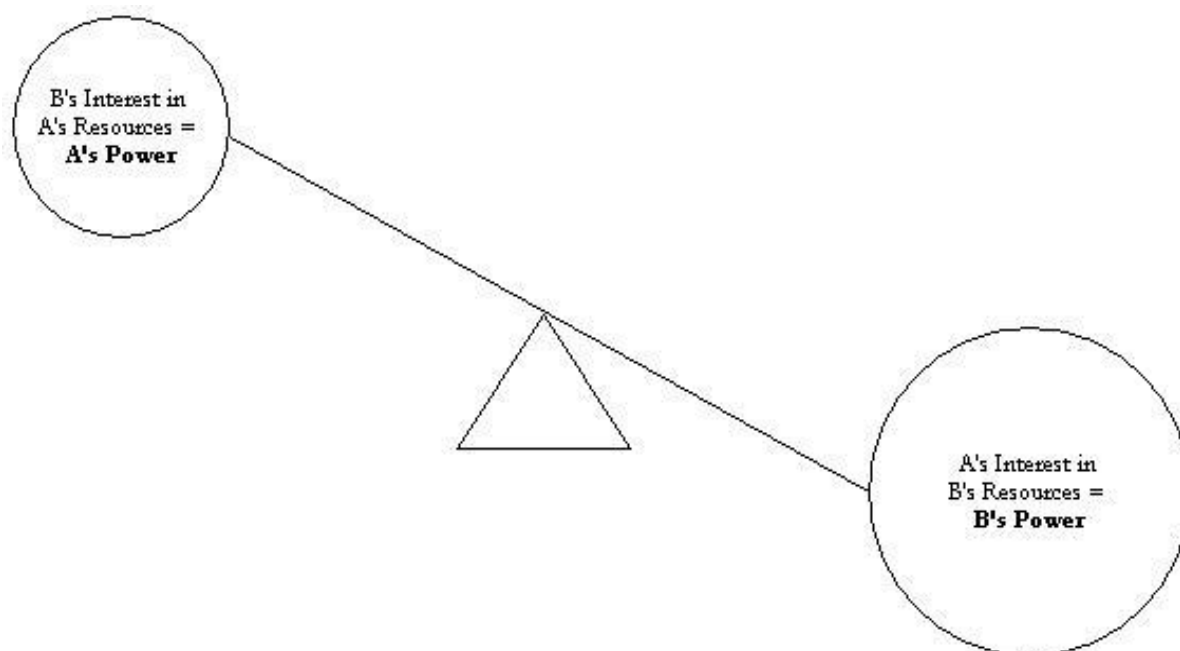
others.^{vi}

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 Schattschneider, 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).

3 QUESTIONS TO ASK YOURSELF

BEFORE ENGAGING WITH OTHERS



What is your truth?

What is your truth? How do you see the issue of race play out in our country, community and schools? What experiences have you have growing up and as an adult that have informed your view of race? Has that view shifted over time? Why? Why not?

Before we start any dialogue, it's important to check in with ourselves and understand what experiences (both positive and negative) we are bringing to the discussion. This is our lens through which we see and understand our world. When our core truth is clear to us, only then can we evaluate our understanding and begin to ask more questions.

What do you value?



What do you value? How do your beliefs about your students, your culture and/or your faith influence what you value? What results do you want to see for our nation's students and our public schools? How do these values influence your perspectives on race?

Our values form the core of how we relate to our nation's problems and opportunities. When we understand our own values and priorities we are better positioned to enter sensitive discussions with a set of shared beliefs.



What's your privilege?

What's your privilege? What are the ways that you might have advantages over other groups of people (this could be by your race, gender, socio-economic status, immigration status, etc.)

Each of us (yes, even the most disenfranchised) has an identity that benefits from the exploitation of another group, so understanding our own privilege is essential to dismantling oppression. Having privilege also doesn't mean that you haven't experienced oppression in other ways. But without awareness of the ways we have structural advantages in our lives, we cannot understand all of the ways privilege and oppression intersect through issues like Institutional Racism.



Get more information at:
Race Matters: How to Talk About Race,
Annie E. Casey Foundation.

3 TIPS FOR ENGAGING WITH OTHERS

ON INSTITUTIONAL RACISM

1 Lead with your values



Lead with your values. It is easier to find common ground on values statements than on prescriptive solutions. Don't try to persuade people that their beliefs are wrong. Instead, find a value focus that is equally dear and compelling to them. The one value that research shows as promising is "opportunity." This allows us to discuss the policies, programs, and practices where access to opportunities are lodged. Additionally this mutes either-or debate about whether personal responsibility or systems are to blame, since opportunity goes hand in hand with personal responsibility. Since this debate is off the table, the focus can be on barriers to opportunity, and the evidence can highlight how similarly situated individuals encounter very different circumstances in terms of opportunities. (E.g., white children with college-eligible academic performance enter college at higher rates than African American and Latino children with college-eligible academic performance.)

Keep it Results Focused



Keep it Results Focused. Keep the conversation focused on the results people want to achieve (e.g., all children graduate from high school) rather than who's to blame for present inequities. Of course, figuring out how to get the desired results will require a focus on what's to blame; that discussion can be directed to policies, programs, and practices that need to be changed.



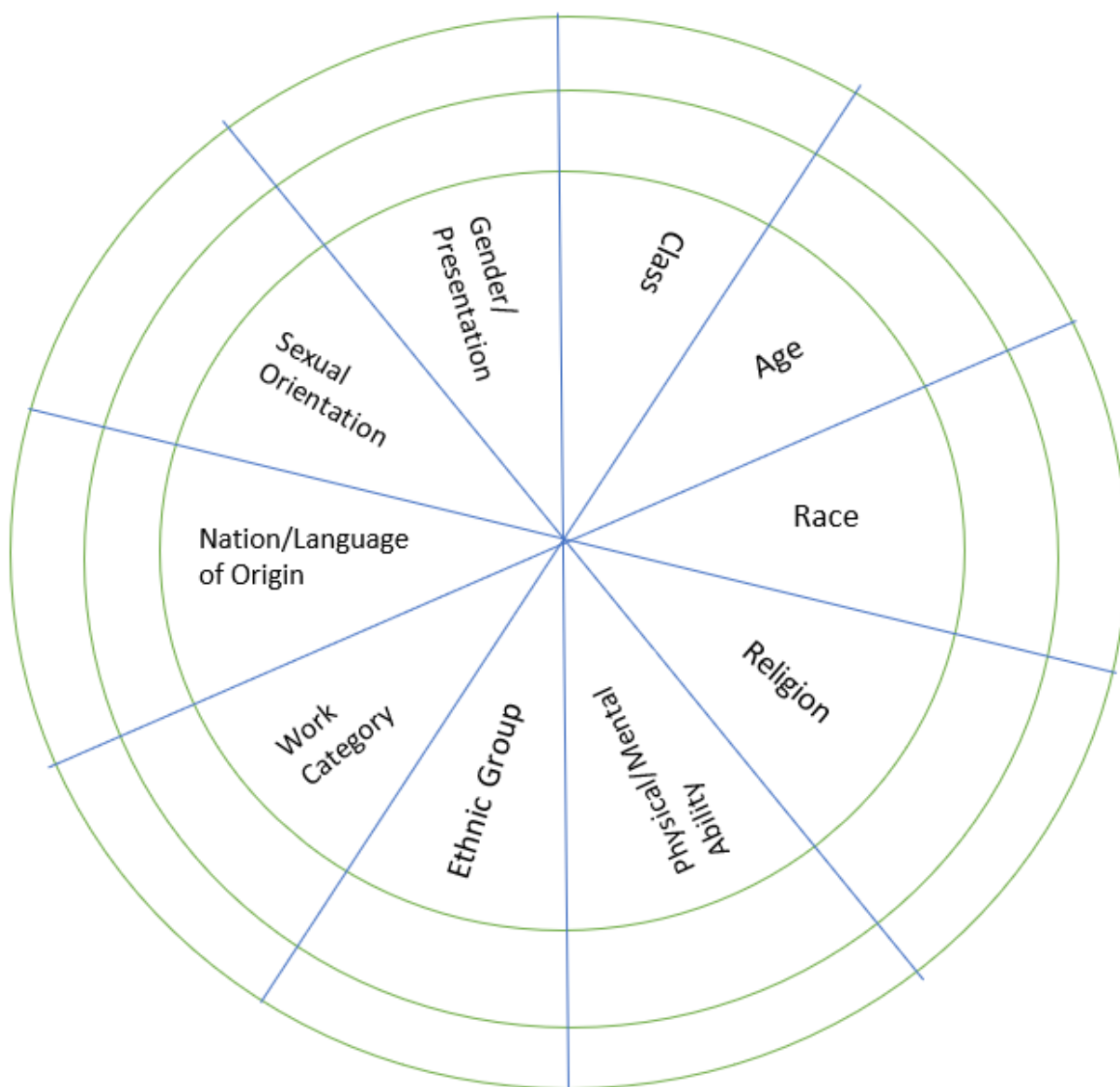
Narrative before Numbers

Narrative before Numbers. If people see numbers that don't fit the model they use in thinking about race, they'll reject the numbers. For example, suppose you present statistics about disparities in juvenile detention that show that even when youth of different racial groups behave the same way, African American, Latino, and Native American youth are disproportionately detained compared to their white counterparts. People wed to the dominant model of the self-making person will still attribute the explanation for those numbers to some unspecified fault of the youth of color themselves. Their dominant narrative trumped your well-researched numbers.



Get more information at:
Race Matters: How to Talk About Race,
Annie E. Casey Foundation.

Power Shield



This activity is based on “Power Flower,” a tool developed by social change educators working with groups to “identify who we are (and who we aren’t) as individuals and as a group in relation to those who wield power in our society.” Each identity is surrounded by an inner and outer ring segment. The inner ring segments represent the dominant or powerful identities within that category in society. The outer ring segments represent oppressed or marginalized identities within that category. Mark the inner or the outer segment next to each trait to describe your social identity.

BEING CALLED OUT / IN

C

CENTRE YOURSELF

You're not being attacked. You're a good person. This is about your behavior and stopping harm to others.

L

LISTEN

Don't interrupt or think of ways to defend yourself. Focus on learning what was harmful and being empathetic/compassionate.

A

ACKNOWLEDGE/APOLOGIZE

Instead of explaining why you did it, acknowledge what happened and apologize, if needed or requested, for the harm you caused.

(I)

(INQUIRE)

(If they consent and have the time and resources, ask what you could have done instead and how to make amends for what happened.)

M

MOVING FORWARD

"The best apology is changed behavior." If they gave you reasonable recommendations and amends, do them. Don't do the harm again. Use this experience to help others learn too.

Continuum on Becoming an Anti-Racist Multicultural Organization

MONOCULTURAL ==> MULTICULTURAL ==> ANTI-RACIST ==> ANTI-RACIST MULTICULTURAL

Racial and Cultural Differences Seen as Deficits ==> Tolerant of Racial and Cultural Differences ==> Racial and Cultural Differences Seen as Assets

Exclusive An Exclusionary Institution	2. Passive A "Club" Institution	3. Symbolic Change A Compliance Organization	4. Identity Change An Affirming Institution	5. Structural Change A Transforming Institution	6. Fully Inclusive Anti-Racist Multicultural Organization in a Transformed Society
- Intentionally and publicly excludes or segregates African Americans, Native Americans, Latinos, and Asian Americans - Intentionally and publicly enforces the racist status quo throughout institution - Institutionalization of racism includes formal policies and practices, teachings, and decision making on all levels - Usually has similar intentional policies and practices toward other socially oppressed groups such as women, gays and lesbians, Third World citizens, etc. - Openly maintains the dominant group's power and privilege	- Tolerant of a limited number of "token" People of Color and members from other social identity groups allowed in with "proper" perspective and credentials. - May still secretly limit or exclude People of Color in contradiction to public policies - Continues to intentionally maintain white power and privilege through its formal policies and practices, teachings, and decision making on all levels of institutional life - Often declares, "We don't have a problem." - Monocultural norms, policies and procedures of dominant culture viewed as the "right" way" business as usual" - Engages issues of diversity and social justice only on club member's terms and within their comfort zone.	- Makes official policy pronouncements regarding multicultural diversity - Sees itself as "non-racist" institution with open doors to People of Color - Carries out intentional inclusiveness efforts, recruiting "someone of color" on committees or office staff - Expanding view of diversity includes other socially oppressed groups <i>But...</i> "Not those who make waves" - Little or no contextual change in culture, policies, and decision making - Is still relatively unaware of continuing patterns of privilege, paternalism and control - Token placements in staff positions: must assimilate into organizational culture	- Growing understanding of racism as barrier to effective diversity - Develops analysis of systemic racism - Sponsors programs of anti-racism training - New consciousness of institutionalized white power and privilege - Develops intentional identity as an "anti-racist" institution - Begins to develop accountability to racially oppressed communities - Increasing commitment to dismantle racism and eliminate inherent white advantage - Actively recruits and promotes members of groups have been historically denied access and opportunity <i>But...</i> - Institutional structures and culture that maintain white power and privilege still intact and relatively untouched	- Commits to process of intentional institutional restructuring, based upon anti-racist analysis and identity - Audits and restructures all aspects of institutional life to ensure full participation of People of Color, including their world-view, culture and lifestyles - Implements structures, policies and practices with inclusive decision making and other forms of power sharing on all levels of the institutions life and work - Commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities - Anti-racist multicultural diversity becomes an institutionalized asset - Redefines and rebuilds all relationships and activities in society, based on anti-racist commitments	- Future vision of an institution and wider community that has overcome systemic racism and all other forms of oppression. - Institution's life reflects full participation and shared power with diverse racial, cultural and economic groups in determining its mission, structure, constituency, policies and practices - Members across all identity groups are full participants in decisions that shape the institution, and inclusion of diverse cultures, lifestyles, and interest - A sense of restored community and mutual caring - Allies with others in combating all forms of social oppression - Actively works in larger communities (regional, national, global) to eliminate all forms of oppression and to create multicultural organizations.

Definitions of Organizing

What is your group's definition of organizing?

Definitions to Consider found at: www.NEA.org/c4o

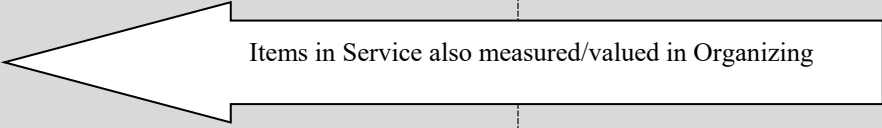
Organizing is people coming together to collectively create the change they want to achieve. It is people joining together to work toward common goals.

In 2002, Marshall Ganz's article in *Social Policy*, titled *What is Organizing?* described organizing this way: Organizers identify, recruit and develop leadership, build community around leadership, and build power out of community. Organizers challenge people to act on behalf of shared values and interests. They develop the relationships, understanding, and action that enable people to gain new understanding of their interests, new resources, and new capacity to use these resources on behalf of their interests. Organizers work through "dialogues" in relationships, interpretation, and action carried out as campaigns.

NEA, Affiliates and Locals organize to build power to make change. Our power comes directly from our members. To successfully build power, we must engage members and increase membership. To engage and increase membership, we must understand the issues our members care about, understand their self-interest.

Organizing and Service Working Together

NOTE: When considering the issue of “creating a culture of organizing,” it is vital to realize that it is not the issue of organizing vs. service. Service to members is important. The point of consideration is how does a pure “service culture” which is episodic build the capacity of the organization? An organizing culture which is continual and sustainable provides the context for the servicing of members and builds the capacity of the organization. Organizing supports the delivery of services, it is not an either/or proposition. The organization has placed value on those things that we can count and quantify. The following illustrates how an organizing culture provides the context for the service culture.

Organizing (Continual/sustainable)	Service (Episodic)
	
Clearly stated vision developed collaboratively that engages members, leaders, staff	Number of members maintained
Number of programs and resource allocation that reflect association mission/vision/core values	Number of grievances filed and processed and employment issues solved
Ratio of members involved in programs that welcomes member participation	Number of arbitrations
Number of new members recruited/ retained	Number of contracts negotiated/unresolved
Number of new leaders identified and trained	Percent of salary increase negotiated
Number of new minority leaders identified/trained	Number of unfair labor practices filed
Number of members engaged in association decision-making and broaden power sharing in the organization	Number of successful election campaigns
Number of political and community coalitions	Amount of PAC fund raised
Number of grassroots political action organizers	Number of successful legislative initiatives
Purpose of the organization known in community via known “brand” of the organization	
On-going assessment of organizational effectiveness	

Organizing Cultures

What:	Service Organizing	Activist Organizing	Relational Organizing
People	Clients	Troops	Story Tellers
Purpose	Help	Win	Building Relationships
Activity	Programs	Events	Individual Meetings
Leadership	Provider/Fixer	Mobilizer/ Gatherer	Builder
Image	Parent	General	Teacher/ESP
Power/Influence	Unilateral	Charismatic	Collaboration
Values	Compassion	Rights of the Person	Hope

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).

Industrial Unionism <i>“Collective power to meet bread and butter needs and ensure fairness from management”</i>	Professional Unionism <i>“Control of the profession to ensure quality”</i>	Social Justice Unionism <i>“Equity for our students through active engagement in the community”</i>
ORIENTATION •Emphasizes separation of management and union roles in defining teacher work. “Boards make policy, administrators lead, teachers teach.” •The role of the union is to limit what teachers can be asked to do and to increase the pay they get for doing it.	ORIENTATION •Emphasizes building professional learning communities and building the craft and the profession of teaching. •Union promotes and protects high quality teaching as a craft, resists threats to teacher professionalism and asserts teacher leadership. Conflicts between teachers and administrators can become de-emphasized.	ORIENTATION •Emphasizes alliances with parents and the community to organize for social justice to help all children succeed – schools and the conditions around schools must both change to improve educational outcomes. •Race and class challenges and socio-economic segregation must be addressed if achievement gaps are to be narrowed.
VIEW OF MANAGEMENT •Assumes labor-management relations are hostile and adversarial. Defends teacher rights & responds to grievances. •Fights for teacher priorities and standard of living in the budget. Organize teachers as an independent force.	VIEW OF MANAGEMENT •Values labor-management collaboration and partnership to improve and preserve public education and the profession. •Emphasizes programs and priorities to improve school quality and student achievement in the public interest	VIEW OF MANAGEMENT •Management and labor are partners in engaging families, community and ethnic groups to build support for public education. •Advocate together for levy referenda, grants, foundation support, and to resist inequitable solutions based on race & class.
ROLE OF PARENTS •Parent outreach when we’re in bargaining crisis or labor/mgmt. conflict. •Limit parent intrusions into the classroom to protect teacher autonomy.	ROLE OF PARENTS •Works with parents to improve individual parent support for their child’s learning, but believes professionals have unique expertise.	ROLE OF PARENTS •Reaches out to community allies in strategic alliances to improve the quality of teaching and teacher cultural competency. •Seeks to maximize parent role in improving school effectiveness.
BARGAINING •Win/lose bargaining; •Limit scope of bargaining to bread and butter issues of salary, hours, and “working conditions.” •Views the teacher contract as way to institutionalize all changes.	BARGAINING •Broad scope and interest-based bargaining are a way to address teaching quality and support issues. •Agreements outside contract. •Contracts are a way to codify change once the bugs have been worked out.	BARGAINING •Infuse bargaining with concerns that address race, class, democracy, empowerment and equity issues. •Change can only be institutionalized and sustained by organizing rank-and-file members and the community.
DECISION MAKING Management prerogatives respected on a school and district level. Teachers grieve management decisions through their union.	DECISION MAKING Expands teacher decision-making and instructional leadership at school and district level. Joint decision-making expands teacher and union ownership.	DECISION MAKING Democratic input by all stakeholders creates processes for institutionalized teacher, parent, and student empowerment.

Industrial Unionism	Professional Unionism	Social Justice Unionism
TEACHING AND THE ACHIEVEMENT GAP • Teachers have limited ability to control conditions that cause the gap. If students come to school unable or unwilling to learn, or if school conditions aren't adequate, teachers must not be blamed. • Efforts to close the achievement gap must not be based on unreasonable expectations and the union's role is to ensure that training and accountability measures don't contribute to an un-sustainable working and learning environment.	TEACHING AND THE ACHIEVEMENT GAP • Quality teaching is critical to closing the achievement gap. It is possible to define and measure quality teaching. The union's role is to make sure good methods are used, and that tools like "value-added-modeling" are used judiciously and carefully. • Union takes a leadership role in improving the quality of teaching/learning and professional development.	TEACHING AND THE ACHIEVEMENT GAP • Belief in "effort-based intelligence"--all students can learn if adequate resources are equitably distributed and available. • Cultural competency/proficiency for teachers to reach all students. • School district funding, equitable distribution of accomplished teachers and school resources are priorities.
TEACHING WORKING CONDITONS • The union works to improve conditions of teaching (Class size, adequate text books and supplies, hours, etc.) • Union emphasizes protection of teachers' rights – files grievances to resolve conflicts. • Seniority provisions are the best protection against employer favoritism.	TEACHING WORKING CONDITONS • The union is willing to take control of the improvement of teaching, support for teacher effectiveness, and quality control in the profession. • Alternatives to seniority-based transfer, assignment and layoff procedures are developed by the union to balance needs of younger and older teachers and the program needs of the educational enterprise.	TEACHING WORKING CONDITONS • Assignment of teachers to schools ensures high-quality, experienced teachers in hard-to-staff schools. • The union supports preferential teaching and learning conditions (e.g. lower class sizes) for high poverty schools. • Seniority-based reductions in force will be modified by the union so as not to disproportionately impact high-poverty, high-turnover schools.
CURRICULUM, INSTRUCTION AND ASSESSMENT OF STUDENT LEARNING • Primary role of union is to improve wages, benefits, retirement, and equal treatment for all members. • Curriculum, professional development, assessment and grading policy are the responsibility of the district management. • Teachers are responsible for teaching and students are responsible for learning. • Teachers must not be evaluated primarily based on student test scores because that unfairly and inaccurately credits teachers for low performance that has other causes.	CURRICULUM, INSTRUCTION AND ASSESSMENT OF STUDENT LEARNING • Union promotes additional responsibility and pay for teacher instructional leaders. • Union brings the teachers' voice to the design, implementation and evaluation of curriculum, assessment and instruction. • The role of student test scores and other factors in teacher evaluation is negotiated and monitored by the union. • Union accepts necessary role of student achievement/learning in teacher and school accountability, because that is how public schools are judged.	CURRICULUM, INSTRUCTION AND ASSESSMENT OF STUDENT LEARNING • Union safeguards teachers' role in promoting critical thinking, critical pedagogy, and a broad curriculum, not aimed primarily at standardized tests. • Teachers encouraged to make curriculum relevant to students' lives and to incorporate student's lives into learning – cultural competence. • Union advocates for a "Broader Bolder Approach" to building a movement to improve the social context for schooling – health care, jobs, housing, etc.

The *Three Frames* document was developed by participants in the Teacher Union Reform Network. See <http://www.turnweb.org/videos/patrick-dolan-organizing-through-the-three-frames-of-unionism-industrial-professional-and-social-justice/> for a video describing the Framework.

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

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- 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.

Foundations of UniServ Case Study

This is a fictionalized description of a school district, some worksites, a few members and the unions for some of the workers. While this might sound or look familiar, it is completely a work of fiction.

Enchanted County School District and the Enchanted County Education Association – Overall Context

This is a mid-size county school system consisting of 65 schools. There are about 3,700 employees who could be covered by either the Certified Employees Contract or the Support Staff Contract. There are 2,900 total members: 1,600 are certified members and 1,300 are support staff (bus drivers and custodians are represented by two other unions). There are 700 non-members in the certified unit, and 5 non-members in the support staff unit. The trend for both units has been declining membership especially in new-to-the-profession certified employees and kitchen workers.

The district is facing a number of challenges. There have been substantial cuts coming from the state to school budgets. This means that the county school board is seeking a raise in property taxes. The most recent negotiations were very public and contentious resulting in a growing dissatisfaction from the public that the school system is only concerned about higher wages and maintaining a rich benefit package. This once relatively middle-class and white district has transitioned, in the past five years, to a majority non-white district with non-dominant English speakers. This new demographic makes up the majority of K-3 students. Despite these changes in student population, the certified employees remain 95% white, mostly women and mostly English-only speakers. Support staff tend to be more reflective of the county population, with large numbers of them living in the “affordable” neighborhoods. The district struggles to retain teachers in the 0 to 5-year experience band and many of these don’t join the union.

The elected, executive leadership of the union consists of:

President of Certified: Donna DeMiddle is a middle-aged, middle-class, suburban-living, white woman who taught middle school for 22 years. She is a full-time release President. She is a native of Enchanted County and graduated from the county schools. She simply wants to return to the days when parents took responsibility for their children and sent them to school with proper values. She remembers when her UD came to her and did the work of the union that she paid for. The UD bargained, talked to those in power and made sure her rights were protected. She has grown dissatisfied with the way that the newer union staff do their work. She would like to become a UD someday and feels she could do a better job.

Vice President of Certified: Stavon Liberaling is relatively new-to-the-profession, with six years of experience and is by choice a high school teacher in one of the largest, poorest, most diverse schools in the city. He has purposely purchased and is rehabilitating a home in the neighborhood of the school he teaches in. Stavon’s parents are immigrants and he wants to ensure that all immigrants and their children have access to the community resources they deserve. He wants the union to use its power in ways that allow members to fight the injustices that matter to them.

The recently elected Treasurer and Secretary are on the newer end of the profession. Both are elementary school teachers and who won primarily because they have openly criticized the current contract bargained by the current President.

President of Support Staff: Velma Overly is a long-time employee working out of the office of the district's largest high school. Her native language is Spanish and she is widely known throughout the county's large Spanish, Catholic church system. She is a leader in her church, and she is widely respected by her members, but not by the leadership of the Certified Union. She is not a full-time release like the Certified President, and due to her work schedule often must miss important organizational meetings due to the timing of the meeting, which are set by the Certified Union leadership. She wants to make sure that her member's jobs are not contracted out and that they see their union as a place of connectivity. She is a bit frightened at the thought of public actions but knows these have been effective in the past.

There is no Vice President or other officers for the Support Staff Union. There could be, but members cite limited time and that Velma does a great job for them.

There are several opportunity gaps in the county that are widening. Many families live with other families in overcrowded and expensive rental situations. Many more teachers are scoring at or below standard on the new teacher evaluation tool and these results are made public allowing parents to see that the highest rated teachers are in the wealthiest, least-urban schools. There is a wide achievement gap between the two wealthy, white, neighborhood schools and their counterparts in the poor, urban center of the district. School access to technology and new instructional resources is not equitable; the greatest inequalities are in the poorest, least white, urban schools. On a recent climate (satisfaction) survey a county-wide score of 1.5 out of 5.0 (0 - being the lowest, 5 - being the highest) was reported on the question, "I feel that my opinion and expertise is respected and used when making decisions about instructional programs".

Data also shows that a growing number of students at all grade levels are being expelled for behavior-related infractions, especially in Title I schools. A closer look at the data shows that there is a disproportionate rate of expulsion among African American boys in two of the schools with the lowest socio-economic profile. These are the two schools that the district has planned to close and spread the student population across five non-neighborhood schools. These are also the two schools who have historically filed the highest number of grievances.

Worksites in the district have varying levels of union presence and union leadership. Of the 65 sites, only about 2/3 have any union rep at all. Most of the reps are classroom teacher members, which means that food service, custodians, and educational technicians may not have a union representative that they feel understands their needs. There are about 20 worksites with a full complement of union reps, one per every 10 to 25 members, and these representatives make it their business to know their members and their issues.

For the most part, most members tend to call the union staff or executive leaders directly with questions and problems instead of using their representative system. Union meetings are not well attended. Only about half of the building reps attend monthly meetings and member engagement in actions is often driven by staff. On the last contract ratification vote only 28% of the members voted.

Scenario 1 –Worksite Growing Tree Elementary (needs work)

This is a Title I school with a high English Language Learner population. Because of concerns about low reading and math scores, students have very limited recess and almost no non-academic curriculum. They do have a rich set of after-school and evening programs – for now. There are 43 certified members here and they have 100% membership. This school is a low-performing school and many types of school reforms have been pushed into this school. Turnover of all staff is high, but especially with those in their first five years. The Certified building rep struggles to get people to attend meetings because members say that they don't want the principal to retaliate against them for attending. The building rep attends every RA but does little on her own to solve small contract issues, relying on calling the UniServ Director. She has been the building rep for at least 20 years and says she can't get anyone else to do the role.

There are 14 teachers in their first and second years of teaching. They each have mentor teachers and will need to complete three successful years at "standard" on the district's evaluation system before they can transfer. Many of them are not from the area and are not familiar with the culture of the students they serve. They themselves struggle to find affordable housing within Enchanted County. These new teachers are just trying to keep their head down so they can transfer. They are also pressured to work through their lunch by the Title I Literacy Coaches. Both literacy coaches who are viewed as "principal favorites" and the more senior teachers. No one wants to cross them.

A large group of 18 education support professionals (ESP) work in the school. They are equally dissatisfied with the working conditions and they are just as fearful of the principal. They don't have any members willing to be their building rep and most don't know their contract rights. If there are any contract violations, either people are unaware of their rights or they are too timid to file the grievances. While the ESP group has 100% membership, they are not well connected with each other.

This school has a very strong Parent Teacher Organization and the school is used for a number of after-school and community programs. The Principal wants to limit parent and community access to the building. Five of the support staff and seven of the certified staff are also parents of students at this school. The principal has cut the home and community coordinator position, cut the popular evening music and art programs, paved over the community garden and implemented new fees for building use by community groups that are above what the district policy requires. The afterschool programs are on the chopping block next.

More Context

The contract grants all employees a 30 minute duty free lunch.

ESP receive overtime for covering evening events.

This building is eligible for three certified building reps and two ESP building reps.

What would you do?

Scenario 2 – Worksite Bright Skies Middle School

This middle school has a very high Free and Reduced lunch participation rate. It is in a neighborhood that people from Enchanted County say is “in decline”. Several of the single-family homes have been converted to multi-family rentals. There is a newly elected head building rep at this building. She attended this school when the neighborhood was still very middle class. Her first job here was as support staff in the special education program. She went to school at night to get her teaching degree and is now striving to be a principal. She has worked to fill the other rep positions and held elections for the two open rep seats. Five people ran for the two openings. Their climate survey satisfaction score is 3.75 out of 5.0 overall, but on question 2, “I would recommend this school as a great place to work,” the score is 1.25 out of 5.0. (1 being lowest and 5 being highest). The head rep is respected by a strong portion of the staff and feels that she gets things done. This head rep reports a strong relationship with the principal, a man with a similar background as hers, and asks that the UniServ Director stay away, even though the other building reps don’t trust that she supports their positions when meeting with the principal.

The district has implemented a new curriculum for schools with high Free and Reduce lunch participation rates, that requires students to pass a placement exam to take Algebra. Many of the math teachers have reported that they don’t feel that they were provided enough time to give all their students a fair and equitable chance to be successful on the testing. There are many African American parents who are also upset by this policy and they feel it is unfair and is keeping their students from taking Algebra.

A group of newer teachers eat lunch every day in one teacher’s room. These teachers are mostly all African American and feel that the principal has some unconscious bias issues. Most of the people in this lunch bunch are not from Enchanted County and came here because of the pay scale and benefits. This teacher who is hosting this lunch bunch is not a building rep and we don’t even know how she feels about the union, but most people agree that they go to her for good advice on working with the parents in the community and the students at this school. They trust her opinion and support. The people who eat in this room believe that ALL teachers should be treated with professional respect by the principal and that it is a problem regarding the inherent racial bias in some of this principal’s policies and actions. Even though they have told their head building rep, she won’t bring up to the administrator because of her aspirations to be a principal.

More Context

Three members of this lunch group have determined a set of actions they could take to improve the placement test problem. They have developed a set of 10-minute meetings, a building member survey and a draft administrative complaint. They have also reached out to their colleagues in other buildings to see if this is an issue in other middle schools and if those schools want to join them in correcting this condition.

What would you do?

Scenario 3 – Worksite Walking Path High School

One of the district's largest high schools has 95 employees with 35% of them in their first five years of teaching. There are six building reps and four of them have been in their position for as long as anyone can remember. One of them recently lost his bid for re-election as the Certified Vice-President. He was defeated by a new rep from this building, Stavon Liberaling. They routinely pass out information from the union and hold regular monthly building meetings that are attended by about 20 of the most senior members. They often discuss problems, but almost never suggest or act on solutions. The four long-term reps routinely attend events that their union offers and make full use of their professional and personal leave. These four reps also plan their family vacation to coincide with their regular attendance at the NEA RA. The two newer reps have been engaged with their state and local union and would like to implement some new programs that would lead to more participation by rank and file in the work of the union. The long-term reps see this as a way to take away the leadership that they have earned. The newer reps are also interested in getting several people to act against some new, top down "rules" the new principal is putting in place. The long-term reps just want to have the Union file a grievance and take care of the issues.

The long-term reps say that their number one priority is that there were not enough pay scale gains bargained into the last contract for those at the top of the scale and that there was an increase in the health insurance premium for single members. These leaders routinely ask the UniServ Director to come and lead their after-school meetings and always include the UD in member issue. There have been a number of member calls to the union help-line indicating issues with observation and evaluation, school discipline policies, lack of useable technology and too much time out of the instructional schedule for testing, but when the long-term reps are asked, none are aware that there are any issues. Everything is fine. These reps all have a great relationship with the principal and with their UniServ Director.

The two new reps live in the same house. They became reps because a sizeable portion of the staff found them respectable and very credible after being participants in a program these new reps designed to help their colleagues better understand how to support LGBTQIA+ students. They are also co-trainers with a group that is providing race, equity and diversity training to the staff. These reps are also extremely active in the local elections that allowed the first ever trans-gender school board member to serve the district. They volunteer at the teen homeless shelter and want their union to be a place that seeks equity and justice for marginalize youth in the community.

Some More Context

The school board is likely to pass a local ban on including "divisive issues" in curriculum. This would include, but not be limited to teaching about the United States racial history and issues related to the LGBTQIA+ community.

White parents in the community are increasingly upset by what they believe is a curriculum designed to make their white children feel shame for being white.

What will you do?

Scenario 4 – Worksite Rolling Seas Elementary

There is a well-liked long-time principal at this school. This is a heavily impacted school: high poverty, large class sizes, and high non-dominant English speakers. The staff recently voted unanimously to support an in-class breakfast program that meant that they had to give up 15 minutes of their contractually granted daily planning time. Twenty percent of the teachers are new and are in their first three years. Membership is at 80% in the Certified unit. There is a new assistant principal who was a long-time union leader. There is a new head building rep who has been teaching for three years. She believes that it is every employee's responsibility to belong to the union. There are three building reps who have developed a system for doing one-on-ones in their building with a target of reaching all their contacts by mid-year. These leaders have surveyed their colleagues seeking input on issues and have identified three issues that colleagues want to improve.

One issue is the support of new teachers, and they are working on plans to organize a new teacher network at the school and with neighboring elementary schools. One of the reps is taking on the issue of helping parents understand curriculum requirements and is using her networks within the Latino community to set up meetings at local churches and the community center. Five members from this building have taken on the issue of developing a new student discipline plan that meets the needs of the students and those of the teachers. They have led teams in their school on writing and reflecting on this new plan but have not yet given it to the principal.

Attendance at the monthly RA from these reps is 100% and they have a 100% return from their building level colleagues on a recent commitment to volunteer for school board election work. This rep team has signed up to host a local school board candidate at their next staff breakfast and they have increased their PAC contributions by 30%. This school has sent three teams of seven to the union-led summer professional development programs. Members at this school have designed and led a number of professional learning groups based on what they determine is most useful for their effective teaching. Members at this building tend to contact their UniServ Director for information, resources and to "double-check" if actions they have planned make sense and are in keeping with sound practice.

The support staff in this building feel like they are invisible. While the teachers feel engaged and happy about how their principal and their union work together, there has been little engagement with the ESP unit. The principal has little regard respect for the ESP members referring to them openly as interchangeable cogs in the school machine. Their building rep has a small group of members who want to do something, but they don't know who they can get to help them or join them in making a change.

Some More Context:

The ESP from this school routinely leave for other schools, and because they are part of the community – the word on the street about their poor treatment has made it nearly impossible to fill vacancies.

The union endorsed school-board candidate is the mother of two ESP who transferred from this school

The Principal is exploring ways to contract out services (this district allows for work site decision making so they could do this even if the rest of the district did not)

What will you do?

Scenario 5 - President Donna

President Donna DeMiddle has called the Union Office looking for a UniServ Director. She starts the call by saying, "I know that I am supposed to be handling everything myself, but I really want your help with an issue.

"The high school staff at Walking Path High School want to file a grievance and they don't have any one of their building reps that feels that they can get the grievance started. Of course, I have only heard from one of our long-time reps, but I know he has his finger on the pulse of the building. He says that a few of the new folks want to have some sort of uprising, but the guys that know how things work just need you to file a grievance against the new principal.

"Here's the problem. The new Principal for the high school has asked the teachers who have had performance issues on their last evaluation, or anyone that has a high rate of behavior issues and office referrals, to turn in their lesson plans. A number of new teachers are struggling with student behavior and the principal is concerned that it will affect the already low attendance in some core classes, and the low standardized test scores will drop even more. I think we are almost last in the state for high schools our size. You know how difficult that school's population is. That new principal is also asking all the staff to participant in race, bias and equity training and wants to make sure the teachers are incorporating these race lessons into their instruction. The members with seniority aren't too concerned, except that two of our long-time reps received poor evaluations last year, so they are going to have to do this new stuff. The others that came to the last union meeting don't want to get on this new Principal's bad side right out of the starting gate. It's really the newer folks who feel like this is an inequity in workload, but we all had to pay our dues when we were new, didn't we?

"So, they need you down there pronto to write that grievance and start meeting with the Principal to get them some relief. The High School staff is really hot about this issue. I can't do it because I have to be over at the middle school training. I really don't know how I am supposed to do all this staff work. Thanks, and I know they will be happy to see you soon."

Some More Context:

The state statute and district policy are silent on the issue of lesson plans.

The Agreement, in the section on "Evaluation" requires, "... demonstration of the ability to plan," as a requisite criterion for successful teaching and it is the purview of the principal whether these plans are required to be turned in.

The other three high schools seem to have teachers doing these sorts of plans, at least nominally, without a peep from anyone.

The entire faculty gets a minimum of five planning periods per week guaranteed in the Agreement.

The newer teachers, who did not feel adequately prepared to teach the diverse students in their class, have requested the training and have asked for support in crafting instruction that is equitable for all students.

What will you do?

Scenario 6 – Building Rep at Bright Skies Middle School

A new building rep from Bright Skies Middle school just sent you a very detailed email describing a situation that he is very concerned about.

Dear UniServ Director,

I am writing to you because I have already spoken to our head rep, and I don't think she understands the situation, or she just does not want to deal with it. I have talked with Vice President Liberaling and he says I should run with any plans I can come up with to solve the problem. I thought I would run the issue by you to see what you think.

We have a policy at our school that before an eighth grader is allowed to take Algebra, they must pass an entrance exam at the end of 7th grade. As you know, Algebra is the gateway to entrance in most colleges and students need three additional math classes. The large number of requisite courses in this district for high school graduation, along with the number of math requirements, makes it very hard to make up Algebra in high school and to take all the other "college ready" courses if Algebra is not taken in the eighth grade.

I am concerned because as an African American, I know that this policy is keeping almost all our black and brown students out of the 8th grade class. There are a number of my colleagues in the 7th grade who are telling the students to simply take pre-algebra in 8th grade because they will have a hard time passing algebra. This issue is compounded by the racially unaware, and the no tolerance policies for attendance, homework, and tardiness put in place by our principal. I have asked our building rep to set up a meeting to discuss this, but she says she is uncomfortable discussing this topic with our principal. She says he is a good guy and just wants to do his best for "those kids".

A number of us have been developing a plan for meeting with parents, maybe writing a letter of no confidence, or possibly attending a school board meeting to bring up these issues.

I am a new to this building rep work, but this seems like an issue we should be dealing with. What would you suggest that I do?

Sincerely,

Building

Rep

Some context:

There is nothing about advancing racial justice issues in the Agreement

The district does have a Racial Equity Framework that is to be applied to all policy decision to ensure unintended consequences have been examined

There have been numerous claims of bias against this principal, but none have risen to official complaints

The neighborhood is known for having a strong activist personality

What will you do?

Scenario 7 – Support Staff President Velma Overly

Velma Overly, the Support Staff President, wants to get some answers for her members and potential members at Rolling Seas Elementary, specifically the kitchen and office staff. She is sitting in your office when you arrive in the morning and jumps right in.

“Well, I think I have finally done it! I have found the issue that will get those non-members at Rolling Seas to sign-up. I am tired of having to do stuff for them when most of them are free-riders.

“You know Rolling Seas. It’s that huge elementary with all those before and after-school programs and has both homeless shelters for families in its neighborhood. They also have a dual-language and a Pre-K program. There are lots of support staff there along with a big lunch program. Due to all the services and rather transient family population, there is also quite a large office staff group. Anyways, I know the issue that is finally going to get them to see the value in the union!

“Rolling Seas got a Federal grant to provide breakfast in the classrooms. No one is happy about it. It is a mess, teachers are losing five minutes off their morning planning time and the kitchen staff have no down time between prepping and sending the breakfasts out to the classrooms and getting lunch ready, because of the size of the school, the first lunch wave for Pre-K is at 10:30. Of course, the principal will not give the kitchen staff more hours because then five of them would become eligible for health insurance.

“The office staff are none too happy either. They have to deliver and pick up the breakfasts at each of the classrooms. It is a huge school and that means that it takes nearly all of them off the phones, the entry scanner and other front office issues. Mornings in that school’s office are a jungle.

“I want the Union to lead the charge to get rid of breakfast in the classroom! I know the teachers would jump in on this issue, too!”

Some More Context:

This neighborhood is the poorest most densely populated in the county and food insecurity is a top issue.

It is true that the breakfast in the classroom program does infringe on the Certified Members contract, but not the Support Staff contract, as they are hourly and the building principal sets hours.

This is one of the hardest to staff buildings in the county, and this is the building with the lowest support staff membership density.

What will you do?

Scenario 8- Worksite Growing Tree Elementary

You have received several voice messages about poor working conditions at Growing Tree Elementary, but no one will leave a name or contact information. All are anonymous and they even state in their message that they are afraid they will be fired if the principal finds out the union has been called. You have repeatedly checked with the building rep, who corroborates the stories, but says she is not having any issues and cannot get anyone who is willing to meet with the UniServ Director. They don't want to be seen talking to the "Union."

From the multiple messages, here is the story you have pieced together. The three Literacy Coaches are personal friends with the Principal. All three of them believe that the mostly Spanish speaking community is likely full of illegal immigrants. They have openly stated this and because of this, that is why they must crack down on these slackers, so children will be able to read and score well on the district reading tests. This school has designated a dual-language immersion school, meaning that white, English speaking families can choose to have their students attend in order to learn Spanish. These are the parents and students, in the faculty's opinion, that these three cater to.

The real problem is a contract violation. Every new teacher is approached by the Literacy Coaches to sit during lunch in the staff lounge and go over their data, they call it 'data and dine'. This request has never been put in writing, and the new teachers want to keep their "noses clean" so they can transfer after three years. The senior teachers know this is happening and never eat in the staff lounge and are never asked by the Literacy Coaches to do so. The number one complaint of the new teachers is they don't even have a chance throughout the day to get to the bathroom and lunchtime is their only break.

Some More Context:

This principal has been investigated several times for bullying Spanish speaking staff, but none of the cases were ever completed as the employees dropped them.

The Literacy Coaches are bargaining unit members but not active in the union.

The contract requires a 30- minute duty free lunch for all employees.

What will you do?

Scenario 9- Change in Leadership

This Enchanted County School District and the Enchanted County EA had a collaborative relationship for many years. However, the relationship began to deteriorate after a popular superintendent retired and the School Board hired a new superintendent and central office team. A salary schedule was settled with an 8% increase in salary, but the members did not completely understand what would be expected in return for this salary increase. The school year and the school day lengthened. Many of the newer members became increasingly unhappy with the district and especially with their elected union leadership. However, this unhappiness was not universally shared. The more experienced members, who remembered the previous collaborative relationship, were neither as angry nor as vocal as the newer members. And they staunchly defended the district and its practices and labeled dissenters as unprofessional. During the next election the Vice President and two other officers who had been involved with the new salary agreement and school calendar narrowly lost their bids for another term: 51% to 49%. The President, Donna DeMiddle won by a very narrow margin. The Executive Committee for the local now consists of a new Vice-President, the previous regime President, a new Secretary and a new Treasurer.

This local is in turmoil. The Vice-President, Stavon Liberaling is young, inexperienced, and was somewhat surprised to win. He feels he has a mandate, he was the dissenter candidate, but understands with the narrow vote that he has a split local. He also understands that this local has had a history of collaboration and would like to bring that back, however there are many issues. The teachers who had felt ignored by their association leaders for the last couple of years started calling the Vice- President instead of the President and shared with him (Stavon) their deep unhappiness with their principals and the work load. One tenured teacher has been involuntarily transferred and believes the reason for the transfer was that he questioned the principal. Several of the members of the local, including the Vice-President, feel that bringing the union into the district is a negative, a feeling strongly shared and articulated by several central office members. The President believes that only a UniServ Director can heal this split. The President has been told by the new executive committee that professional educators can work things out, that legal counsel and outside help is not needed.

The Support Staff Association has had a similar shift in relationship with the new Superintendent but have yet to bargain a new contract with him. The President, Velma Overly, is a much loved and respected leader, but she does everything for her members. She has made it her life calling to serve her church community and her union. She has made union leadership sound so daunting that no one will take it on. Velma has not reached out for any support or coaching, but you have heard from a number of building reps at the last meeting that there a lot of issues that members would like to address.

Some More Context:

The certified contract is only for one year, and part of the way the money was found to provide the salary increase was to remove the required ESP to Students with Special Needs in the classroom. Now only those with specific IEP 1 to 1 support will have an ESP in the classroom.

The Certified President and the ESP President are friends.

What will you do?

Reflections, Connections and Notes for Later

Participant Handouts

Day 3



What is the Foundations of UniServ Academy?

The Foundations of UniServ Academy is a five-day intensive classroom and worksite organizing experience led by practicing UniServ Directors and NEA field staff. Any UniServ Director with up to three years of experience is required to attend this to ensure that there is a consistent foundation of knowledge across the NEA UniServ workforce.

Director

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APATHY ISN'T REAL

The first attitude adjustment an organizer needs is to get over the idea that co-workers don't care—that your workplace is bogged down in “apathy.”

It's a common gripe. In Labor Notes workshops we often ask union members to make a list of the reasons why people don't get involved where they work. Typical answers include:

- Lack of time.
- Don't know how to do it.
- The union is not open; there's no easy way in.
- Conflicts between groups.
- Conflicts between individuals.
- My co-workers feel that nothing will change.
- They think everyone *else* is apathetic.
- They're looking for individual solutions.
- And the big one: fear.

Sound familiar? It might feel like your co-workers don't care. But push a little bit, and that's never really true.

Everyone cares about something at work. Just about everyone cares about their wages, for instance. Everyone wants respect. No one's indifferent to whether their shift is miserable. It's impossible not to care.

Could it be that your workplace is the one in a million where everything's fine? Maybe your co-workers are completely secure about their jobs, love their supervisors, make excellent money with terrific benefits, have no worries about downsizing or layoffs, face no health hazards, and are confident about their retirement. If so—put down this book and get another hobby!

But it's more likely that people are scared to say anything, or feel powerless.

They might say everything is fine because they don't believe it can change, or they can't imagine it being different, or they assume the problem they care about isn't a “union issue.” Organizing is the antidote.

Everyone cares about something at work.

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Remember Maria Martínez’s co-workers at the meatpacking plant? Most had never been to a union meeting—but they did care that their supervisors were harassing them. They just didn’t think they could do anything about it. Once they saw people organizing to tackle the problem, they wanted to get involved.

So when you’re assessing why more people haven’t stepped up to take on the boss, it’s important to find out the actual reasons. You have to diagnose the problem before you can write the prescription.

It’s not apathy—but what is it?

You have to diagnose the problem before you can write the prescription.

Step back from your frustration and look at things from an organizing perspective. This chart shows five common problems and how you can help your co-workers get past them:

HOW THE BOSS KEEPS US DISORGANIZED

The boss relies on...	The organizer...	Co-workers find...
... fear of conflict and retaliation.	...taps into righteous anger about workplace injustices.	...the courage and determination to act.
... hopelessness , the feeling that things can't change and we have no power.	...helps develop a plan to win , and shares examples of victories elsewhere.	... hope that change is possible and worth fighting for.
... division , pitting workers against each other.	...identifies common ground and builds relationships.	... unity to act together.
... confusion , passing around messages that will alarm or distract us.	... interprets and shares information, fitting it into a bigger picture.	... clarity to see through the boss's plan.
... inaction , since problems can't be solved, so why bother?	... mobilizes co-workers to do something together.	...that action gets results and solves problems.



Download this chart at labornotes.org/secrets

Walking Path HS Roster

New Hire	First Name	Last Name	Membership Type	Local Role	Department	Estimated Generation: Babyboomer (BB), Generation X (X), Millennial (M)	Political Action Fund Donor Status	Everything else we know
	Gabriella	Ackerman	non-member		ELL	M	N	newly dropped due to Janus decsion
	Andrea	Atwood	non-member		math	M	N	newly dropped due to Janus decsion
	Annette	Barnhart	non-member		interventionist - reading	X	N	Feels like the older staff can't teach well
	Shari	Berri	member		PE	x	N	
new	Maricella	Bobella- Fififofella	non-member		English	M	N	Poor Evaluation
	Nicolette	Brennan	non-member		English	BB	Y	involved w/Immigration Defence Project
	Conisha	Brennan	member		science	BB	N	
New	Rustin	Bumper	member		ELL	X	Y	Poor Evaluation
	Chistian	Chronister	member		interventionist- behavior	X	N	
	Chirstopher	Church	non-member		science	M	N	Second Career choice
New	Corey	Conkilin	non-member		Parent Outreach	BB	N	on county council, looking for another job
	Cythia	Cox	non-member		English	M	N	Lives next to Karyn Schnell and walks dog at same time
	Janet	Dammet	member		PE/social studies	X	Y	neighbor to Matt Damon
new	Matt	Damon	non-member		English	X	N	national board certified, plays rugby
	Charles	Darwin	member	AR	librarian	BB	Y	Defeated by Stavon for VP, poor evaluaition
	Leila	Delilia	member		math	X	Y	Thinking of dropping membership
	Alisdar	Enid	member		ELL	X	Y	Thinking of dropping membership
	Leonardo	Ernesto	member		social studies	BB	N	
	Rosiland	Franklin	member		ELL	M	N	involved w/Immigration Defence Project
	Erin	Franks	member		math	BB	N	hates the new union leadership - wants a raise
	Eric	Freeman	member		Community Coord.	M	N	
	Jane	Garber	member		agriculture	BB	N	Thinking of dropping membership, goes to church with Floyd Mayweather and Cheryl Safety
new	Elonza	Garcia	member	AR	social studies	M	Y	Lives with David McLaughlin
New	Heidi	Gumke	member		agriculture	X	Y	Dating Jennifer Housse
	Brenda	Hammond	member		special ed.	BB	Y	YMCA board member, was transferred from 12th grade to 9th
	Paula	Harris	member		social studies	BB	N	
	Jeannette	Heib	member		Art	M	N	
	Jackson	Henry	member		librarian	BB	N	20 Years at this same school
	Jeffrey	Hilts	member		science	BB	Y	National Board Certified, Considering Dropping Membership
new	Katrina	Hilts	non-member		math	M	N	Poor Evaluation
New	Jennifer	Holden	member		special ed.	M	Y	Poor Evaluation
new	Jennifer	Holman	non-member		Art	M	N	looking for another job
	Jennifer	Housse	member		agriculture	BB	N	Dating JHeidi Gumke but also in a relationship with Jennifer Holman
	Jill	Hutter	non-member		math	M	N	newly dropped due to Janus decsion
new	Katherine	Johnson	member		math	M	N	dating Krystyna Kapsa
New	Chemika	Jordan	member		ELL	X	N	Poor Evaluation
new	Lynette	Jornan	non-member		math	X	N	Alternative certification - needs mentor
	Therese	Juarez	member		Counselor	BB	Y	Thinking of dropping membership, Activist in Mi Familia Vota
	Krystyna	Kapsa	non-member		special ed.	X	N	looking for another job, recently dropped membership due to Janus
new	Emyd	Khan	non-member		technology	M	N	religious beliefs prevent membership with unions

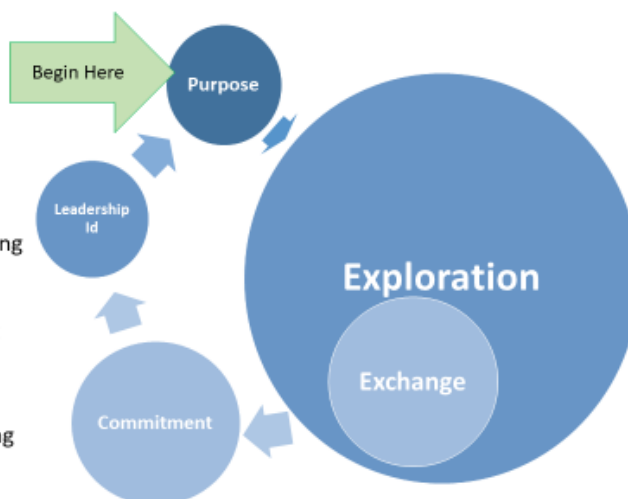
New	Karen	King	member		Interventionist - math	X	Y	
	Kristine	Klong	non-member		Instructional Coach	M	N	newly dropped due to Janus decsion
	Karyn	Knapper	member		Equity Program Leader	M	Y	
	Kathleen	Kroll	non-member		math	M	N	newly dropped due to Janus decsion
	Hedy	Lamar	member	AR	technology	X	N	filed a sexual harrasment case against Rick
	Shawn-Li	Lee	member		technology	M	N	National board certified
	Stavon	Liberaling	member	VP	special ed.	M	Y	special educator, community member and EA VP
	Kevin	Long	member		Life Skills	BB	Y	Poor Evaluation
New	Kimberly	Lowe	member		interventionist- behavior	X	N	
	Magrid	Marcienne	member		French	BB	N	
	Floyd	Mayweather	non-member		French	BB	N	having trouble w/his evaluation
new	David	McLaughlin	member	AR	English	M	N	Lives with Elonzo Garcia
	Lucia	Mello	member		interventionist - reading	X	N	
	Maria	Mendoza	member		science	BB	Y	
	Linnea	Miller	member		special ed.	M	N	Active with Mi Familia Vota
	Leisa	Miller	non-member		special ed.	M	N	newly dropped due to Janus decsion
	Barbara	Miller	member		chemistry	X	N	dept.head, National Board Certified
	Lorri	Morris	Member		Life Skills	BB	N	Poor Evaluation
	Lyle	Mosar	member		Spanish	BB	N	believes that the new union leadership is corrupt
	Lynne	Moss	member		English	BB	N	Poor Evaluation
	Mark	Nelson	member		social studies	BB	N	Has record number of filed grievances - none won
new	Ben	Nyun	non-member		English	M	N	Member of the Affordable Housing League
	Hannah	Olson-Twin	member		math	BB	N	Avid Dog Lover
	Louis	Pasture	member	AR	social studies	BB	Y	Lions Club member, poor evaluation
New	Micky	Perry	non-member		Instructional Coach	BB	N	transferred as part of settlement re a grievance in his last position - just dropped his membership
	Francis	Powers	member		Instructional Coach	BB	Y	Does not think the younger members are serious about their jobs
new	Micheal	Preston	non-member		math	X	N	just wants everyone to be professional
	Naomi	Procnier	member		interventionist-math	X	Y	
New	Jesus	Rivera	member		science	BB	Y	Friends with Gabriella Ackerman
	Sally	Riveria	member		math	X	Y	Neighbor to Floyd Mayweather, activist in Mi Famila Vota, National Board Certified Teacher
	Hellen	Rockwell	member		interventionist- behavior	X	N	
	Earnesto	Rodriguez	member		Spanish	M	N	Friends with Stavon Liberaling
new	Cheryl	Safety	member	AR	special ed.	BB	Y	working on adminstration degree
	Karyn	Schell	member		Drama	BB	N	
new	Rick	Schmick	non-member		science	X	N	Second Career choice
	Robert	Schuller	non-member		math	M	N	newly dropped due to Janus decsion
New	Ryan	Simonson	member		Communtiy Coord.	X	Y	Member of the Affordable Housing League
	Mary	Smith	member		PE	x	N	
	Richard	Smith	member		PE	x	N	
new	Carlin	Stein	non-member		ELL	M	N	former charter school employee
	Sheila	Stirn	non-member		English	M	N	newly dropped due to Janus decsion
	Bob	Swartz	member		English	X	N	dept.head, John Birch society member
	Nikola	Tesla	member		physics	M	N	plays rugby
New	Cindy	Thomas	member		special ed.	M	N	Looking for a new job, seen as a bit of a "big mouth"
new	Theresa	Wacseniak	non-member		science	X	N	Second Career choice
	Tessa	Ward	member		nurse	BB	N	

	Thomas	Warren	member		Counselor	BB	N	Poor Evaluation
	Becky	Wecky	member		PE/health	X	Y	plays rugby
new	Ty	Wilcon-Mann	non-member		Art	M	N	Member of the Affordable Housing League
new	E.O.	Wilson	member		science	M	N	Poor Evaluation
	Eve	Winters	member		Counselor	BB	N	Wants a promotion to central office
new	Willy	Wonka	non-member		Spanish	M	N	dating Barbara Miller
new	Joshua	Yak	non-member		English	M	N	Poor Evaluation
							N	

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 Relationship Building Script (Based on 25 Minutes)

Purpose VERY BRIEF 1 minutes:

Hello my name is _____. I am excited that we could meet today to talk about _____. We scheduled (amount of time) so I want to jump right in. What are a brief 2 or 3 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?

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.

Thinking About Organizing Conversations – A.K.A. – One on Ones

Organizing Through the Anxiety by Max Belasco, UPTE-CWA for "The *Strikewave* Editorial Collective"

Imagine this for a minute:

You're representing your local at a day long new staff orientation. Your contract gives you fifteen minutes to talk about the union, sign members up for mailing lists, and get as many in the room interested in coming out to the next meeting. Management has "unintentionally" gone long in the driest HR presentation you can imagine, and warms the room up for you by saying that once the union representative is done everyone can break for lunch. By the time you're up, you've got ten minutes and the crowd is looking at the clock more than you. Who are you, trying to talk contracts and grievances and putting their lunch off?

Or maybe think about this scenario: you need to visit a building on campus filled with workers notorious for being evasive and difficult to reach. You're in contract negotiations, and you need to get folks to sign commitment cards saying that they'll keep paying their dues for the coming year. There are some in the building that are friendly to your union, but there are more than a few that won't greet you warmly. You've got to prepare for coworkers demanding that you leave the building, along with some very aggressive managers who will threaten to call security if you dare to talk to their workers while they're on the clock.

If you're at all like me, either of these situations makes your stomach turn. I vomited after my first visit encountering workers hostile to our union. I'm an introvert by nature; I've been struggling with social anxiety for most of my adult life, and I'm normally very conflict-averse. Many of our union kin are in the same boat, and some still don't seem to understand why I wanted to start engaging members and take on the duty of being a steward for our local. They certainly don't believe me when I explain to them that I find the experience empowering and therapeutic.

The first dozen times I did site visits or presentations to new staff were some of the hardest experiences I've had at work. Having conversations with dozens of complete strangers on a regular basis, and getting asked very specific questions about HR and the grievance process, all the while trying to look more authoritative and trustworthy than management, is a nerve wracking experience. What if I give the wrong information, mess up someone's case, embitter them and their coworkers forever to the union? What if I lose this whole orientation crowd and nobody attends our new member meetings? What if someone more experienced could have handled that conversation better, won that member over, and my failure to do so is just hurting my union?

But it started to change for me when I first learned to have organizing conversations. Conversations with strangers, inside or outside a union context, are frightening to me. I'm terrible with small talk and I never know what to say. I thought organizers had to be charismatic and witty, charming members into attending meetings. It never dawned on me that there was a structure to the way organizers would have conversations with those they are organizing: a structure that guides someone into becoming more involved in building their union. Once I learned that organizing conversations have a natural arc and you can use this to identify a coworker's issues, agitate them by validating their concerns, get them to lay the blame at the feet of the boss, and then have them commit to take action to resolve the issue, I started picking up some lessons I use for every social situation.

Of course, organizing conversations aren't exactly like conversations you have with friends and family—it's poor form to bring a petition or union cards for everyone to sign at Thanksgiving. But I've found what makes for a good organizing conversation also makes a good conversation in general. Trying to discover my coworker's issues made a lot more patient and deliberate in my listening to any conversation partner, making me focus on asking

questions rather than scrambling for something clever to say. Don't get me wrong: I'm still terrible at small talk. But I feel my conversations in general have gotten much more thoughtful and clear since I started adopting lessons from organizing conversations.

When I first started canvassing buildings I found success agitating coworkers once I found out what issues bothered them the most, but earning a commitment from them to come to a meeting seemed impossible to me. Part of it was just not wanting to be rebuffed by a lot of coworkers about union work, but another part of me was worried that maybe I was pushing people too much out of their comfort zone. What if I was demanding too much, and actually coming off as a jerk?

I remember sharing this concern with a more experienced union member, and his response to me is something of a mantra now—"Don't make decisions for your coworkers." An organizing conversation is an invitation you give your coworkers to take a more active role in building their power in the workplace. They may say no, but if you never ask you deny them that opportunity to make that decision for themselves.

I'm not saying that every introvert should brave their anxiety and other inhibitions to become a steward, or dive head first into organizing conversations. They're challenging and can be emotionally taxing, and it took years of practice for me to get competent at them. However, they're also structured, and that structure keeps me centered when I'm organizing in a way I don't find in other social situations. I doubt that I'd have the handle on my own social problems that I have now if I didn't learn organizing conversations as a technique.

Talking with your coworkers is hard. Having a weak union—or no union—is much harder. The way we build power is by learning to trust each other, and you build that trust one conversation at a time. Make sure that you know your own limits, but don't think being a good organizer is contingent on being a social butterfly.

Max Belasco is a rank-and-file member of UPTC-CWA and a member of the StrikewaveEditorial Collective.

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



EXERCISE: WHY WE NEED LEADERS TO ORGANIZE

Let's start out by imagining that Walking Path HS has just learned that the district announced it has eliminated the HS school librarian positions, and laid off the two librarians, one 20-year educator and the other is your building rep. You have until the end of the day to get the word out about a sticker in support of the Library for High Schools campaign beginning tomorrow morning. You want every member to be wearing a sticker at the start of and throughout the day of action. Because people can feel intimidated about taking action or confused about the issue, it's best to hand out the stickers in person, not just leave them in a mailbox or lounge. It's important for the union to explain the issue and answer questions before the principal or administration has a chance to get out their side of the story. Use the following questions to make a plan for your sticker day.

- **Total number of people** you want wearing the sticker: _____
- **How many departments?** Can you cover them all? Who moves around the worksite and can reach other departments?
- **How many start times** are there? Who can get stickers to teachers and school employees based on each start time?
- **Where's the best place** to reach people before they start work? Where are all the entrances?
- Are there groups of workers who rotate schools and don't **come in everyday?** Who can reach them?
- Can you get a sticker onto **everyone** by yourself, or with your current group of building reps?

If not, that's why we need to map and chart our school, then recruit enough leaders to reach every teacher and school employee!





EXERCISE: IDENTIFYING LEADERS

Background:

You are a the UniServ Director for Walking Path High School, and are trying to restart the school site leadership committee. This committee works closely with the building administration on solving work site problems around schedules, curriculum, and contract maintenance. The committee used to have 10 members, but hasn't been meeting for awhile. You would like to recruit some new leaders to the committee.

Instructions:

Read the profiles of the contacts you make and the information they share with you. You have no more than 15 minutes to determine who you think you want to recruit as a leader. Develop consensus in your group about who are the best prospects to recruit. Rate the three best prospects (1 = the best).

- 1. _____
- 2. _____
- 3. _____

Who is the worst possible choice to build the union? _____

Contact 1

Brenda Hammond

Time at school: 15 years

Issues: After 14 years teaching 12th grade, the principal moved her to 9th grade with no explanation. She is worried she's being pushed out.

Page 99

I don't know who people look up to. It's not me. Nobody cares how I feel. I just organize the showers and birthday parties.

Sure, I have a list of everyone's numbers. I don't mind sharing it with you.

I'm just waiting for a better opportunity to come along, then I'm leaving. I can't afford to make it look like I'm making trouble.



You should talk to Francis Powers. She's a real leader, although she has some screwy ideas.

Sally Rivera is a real fighter, but sometimes she just fights for herself. Sally is one of the younger teachers. She likes to party a lot. I really respect Paula Harris.



Contact 2 Sally Rivera

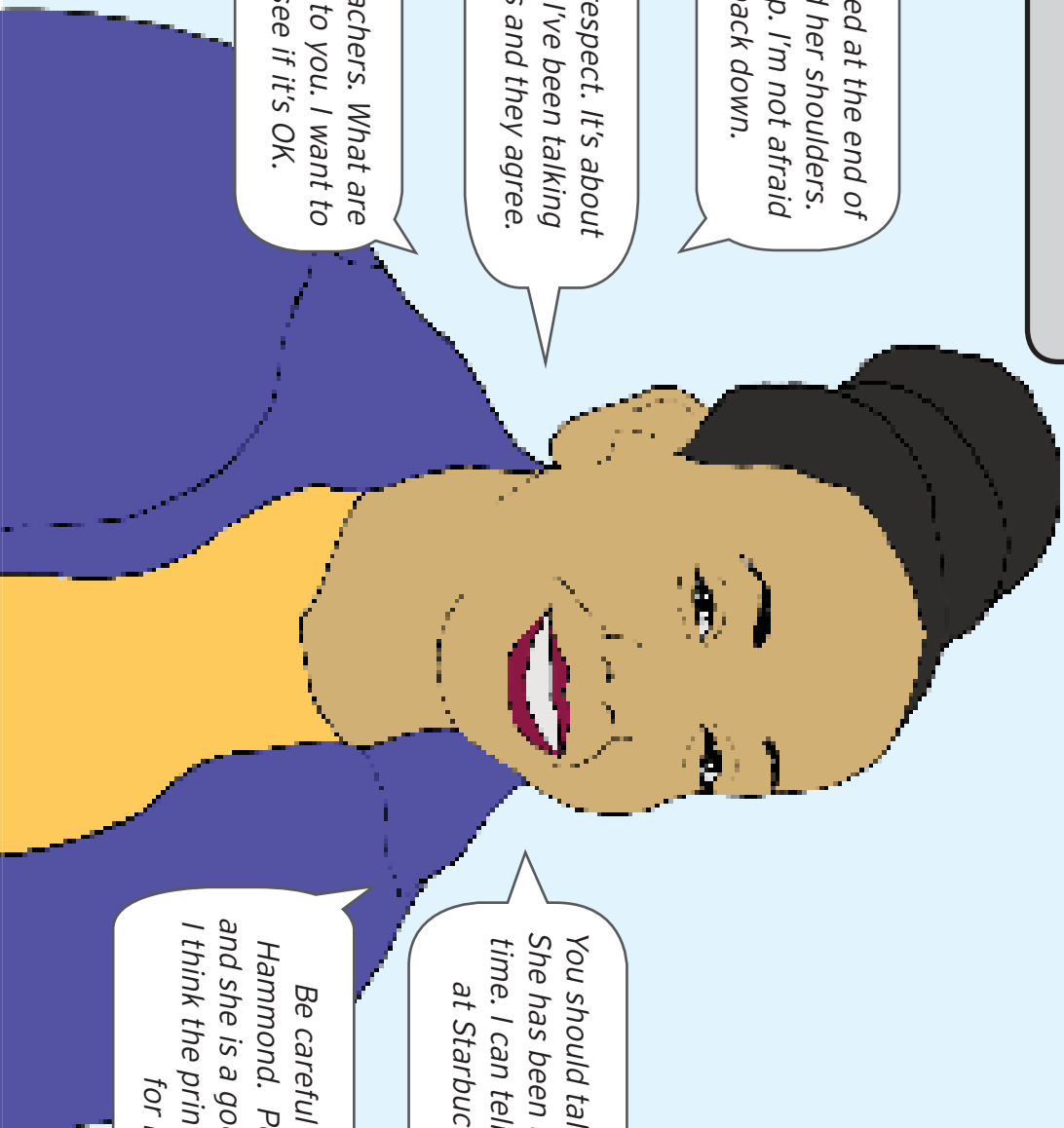
Time at school: 4 years

Issues: Not enough prep time and teachers have no voice.

I told the principal I'm exhausted at the end of the day and she just shrugged her shoulders. I'll tell you one thing, I'm fed up. I'm not afraid to speak up and I won't back down.

We need power and we need respect. It's about time someone listened to us. I've been talking to some of the other teachers and they agree.

I mainly talk to the younger teachers. What are their names? Let me get back to you. I want to check with them first and see if it's OK.



You should talk to Evie Winters. She has been around for a long time. I can tell her to meet you at Starbucks after work.

Be careful of Brenda Hammond. People like her and she is a good teacher, but I think the principal has plans for her.



Contact 3 Eve Winters

Time at school: 12 years

Issues: The workload is too high.

They promised me an assistant principal position. I'm not getting involved until I know if I am going to get my promotion.

I'm not saying anything or doing anything until then. If it goes to one of their pets, I'll be mad as hell.

Brenda Hammond is a great teacher, but a little shy. Powers is a great gal. A little nutty, but people follow her.



The younger women seem to stick together. They party a lot and Sally Rivera is their ringleader.

Everyone respects Paula Harris. She was teacher of the year last year. You should see Helen Rockwell. She speaks her mind.



Contact 4

Francis Powers

Time at school: 8 years

Issues: Pace of work

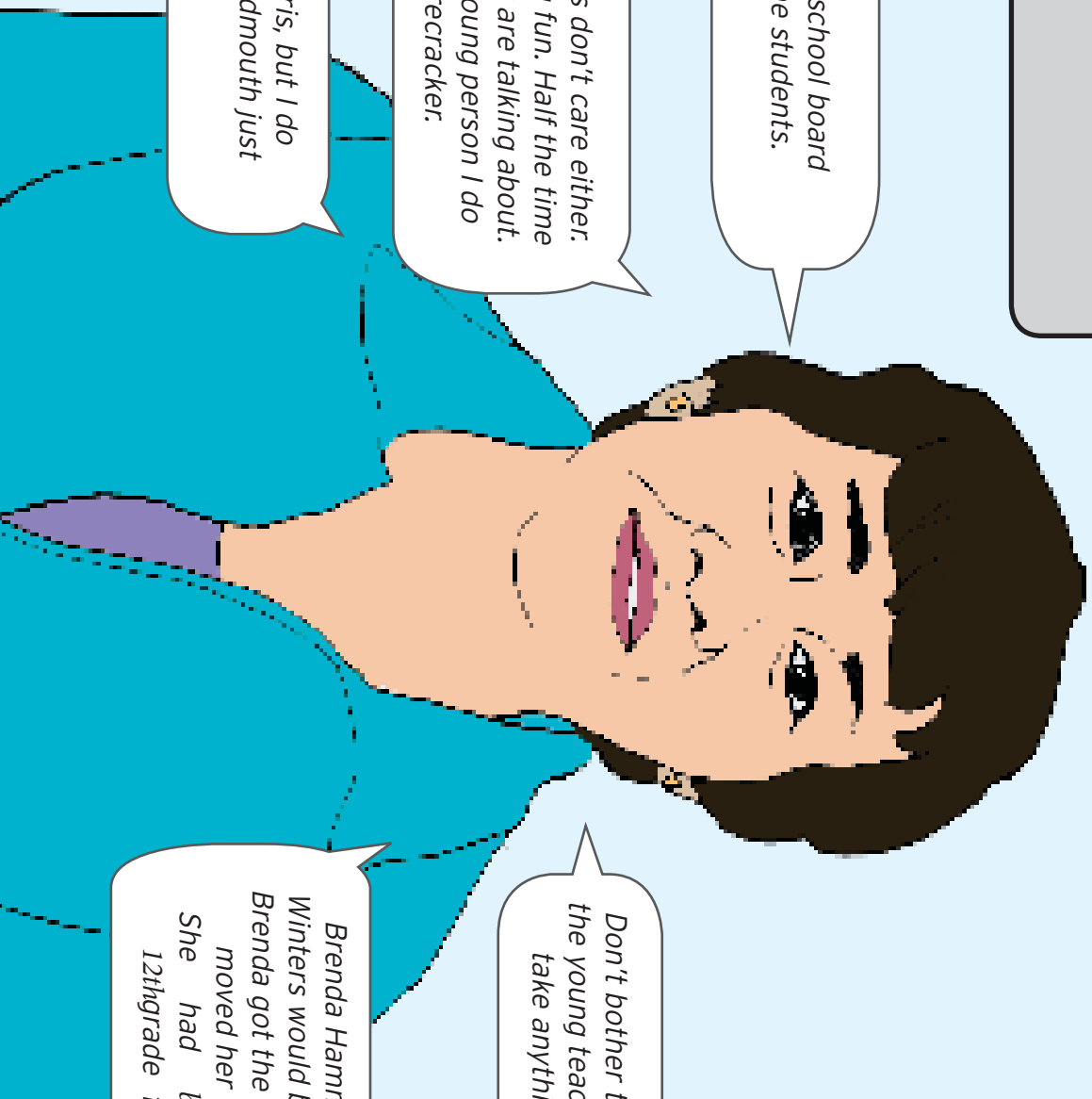
We're just victims here. The school board doesn't care about us or the students.

Some of these younger folks don't care either. They only care about having fun. Half the time I don't even know what they are talking about. Cindy Thomas is the one young person I do like. She is a real firecracker.

I really don't like Paula Harris, but I do respect her. Rockwell is a loudmouth just like Mary Smith.

Don't bother talking to any of the young teachers. They don't take anything seriously.

Brenda Hammond and Evie Winters would be good leaders. Brenda got the shaft when they moved her to 9th grade. She had been teaching 12th grade for 14 years!



Contact 5
Cindy Thomas

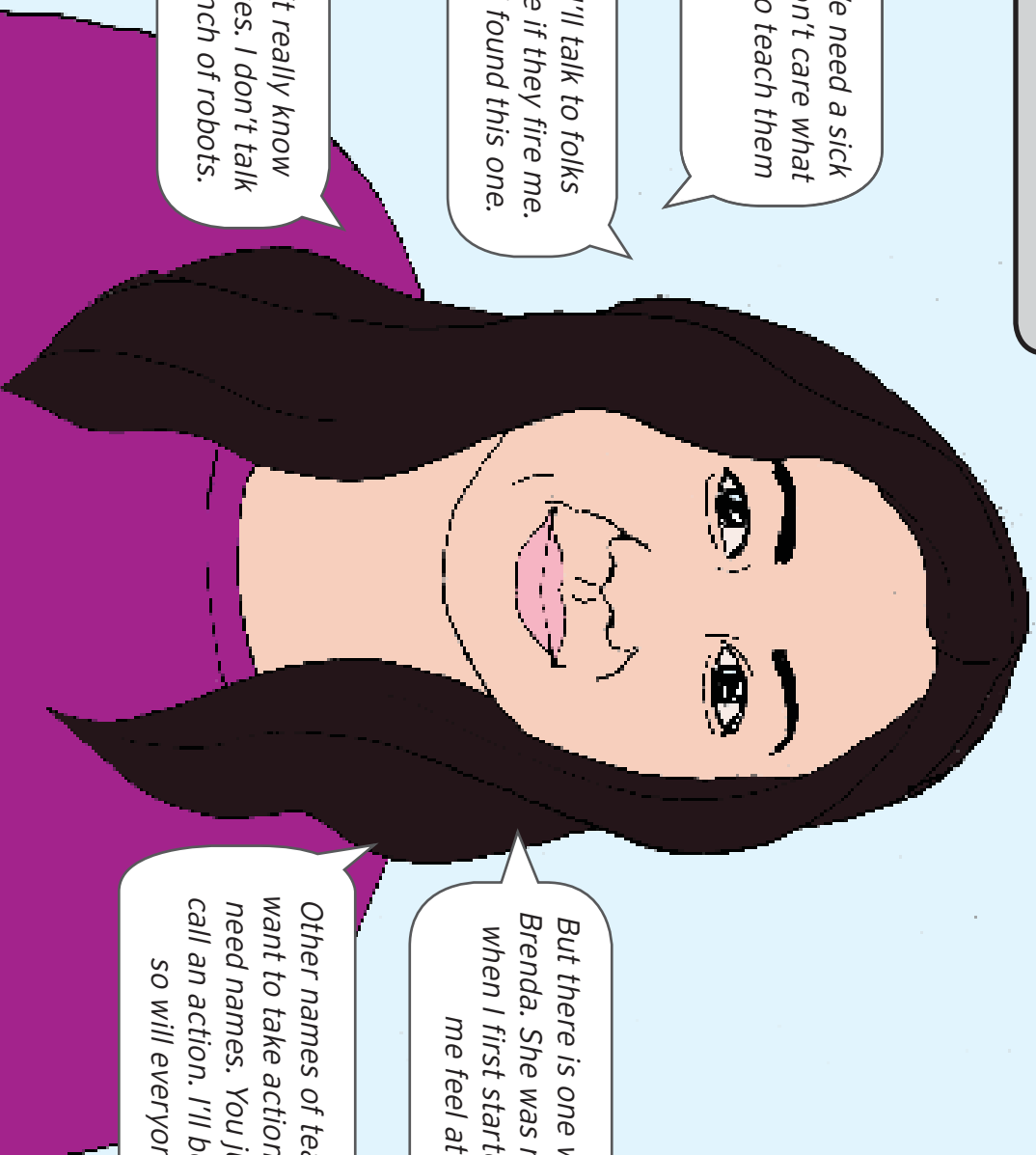
Time at school: 3 months

Issues: Disrespect from the principal.

We need to shake things up. We need a sick out or some sort of action. I don't care what the principal thinks. We need to teach them him a lesson.

Just give me the word and I'll talk to folks about walking out. I don't care if they fire me. I was looking for a job when I found this one.

Who would I talk to? Well, I don't really know their names, I just know their faces. I don't talk to them much. They are all a bunch of robots.



But there is one woman named Brenda. She was real nice to me when I first started. She made me feel at home.

Other names of teachers who want to take action? You don't need names. You just need to call an action. I'll be there and so will everyone else.



Participant Handouts

Day 4



What is the Foundations of UniServ Academy?

The Foundations of UniServ Academy is a five-day intensive classroom and worksite organizing experience led by practicing UniServ Directors and NEA field staff. Any UniServ Director with up to three years of experience is required to attend this to ensure that there is a consistent foundation of knowledge across the NEA UniServ workforce.

Director

Tom Israel

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Academy Coordinator

Ellen Holmes

eholmes@nea.org

Reflections, Connections and Notes for Later

Participant Handouts

Day 5



What is the Foundations of UniServ Academy?

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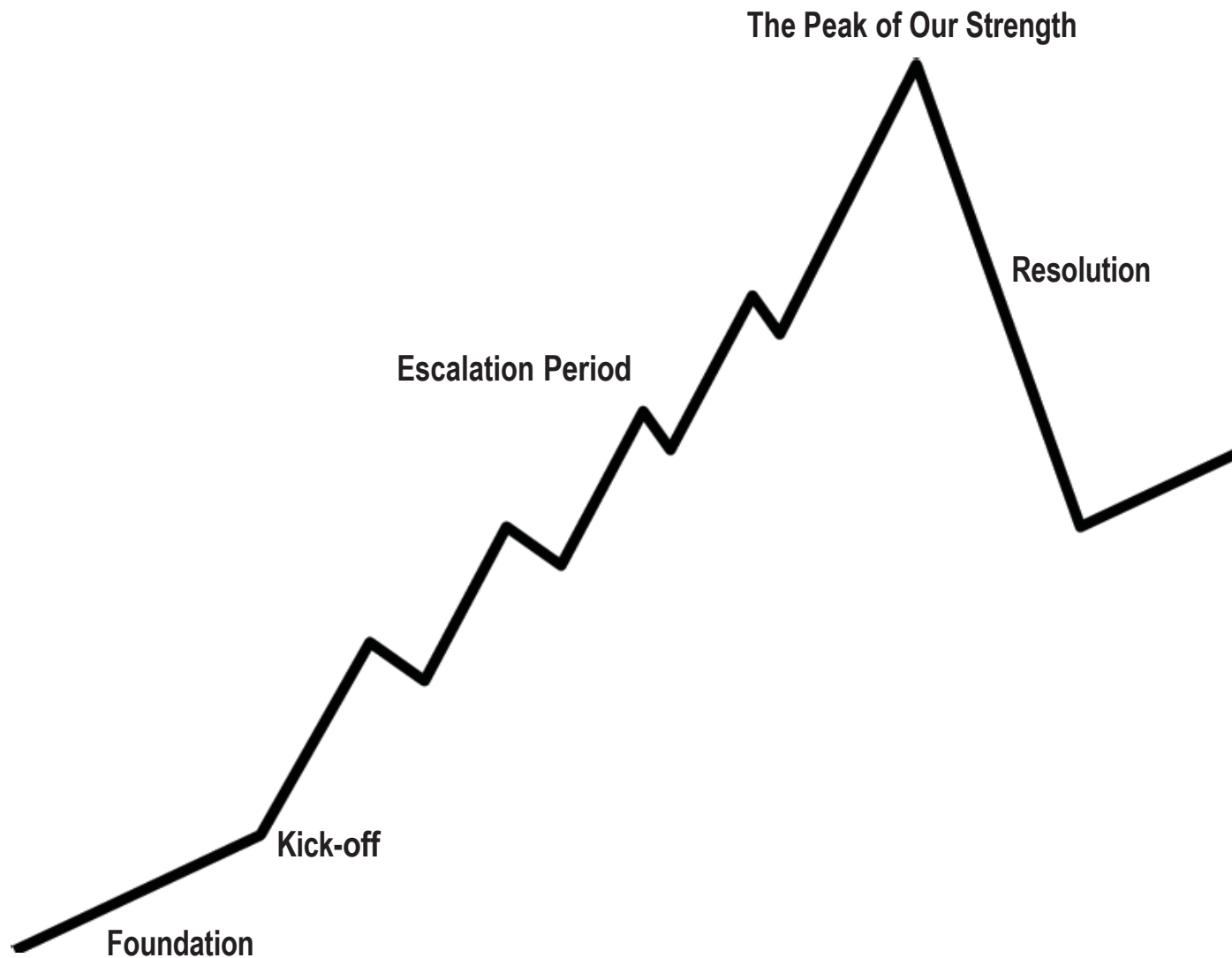
Academy Coordinator

Ellen Holmes

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CAMPAIGN MOUNTAIN

Phases of a Campaign





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.

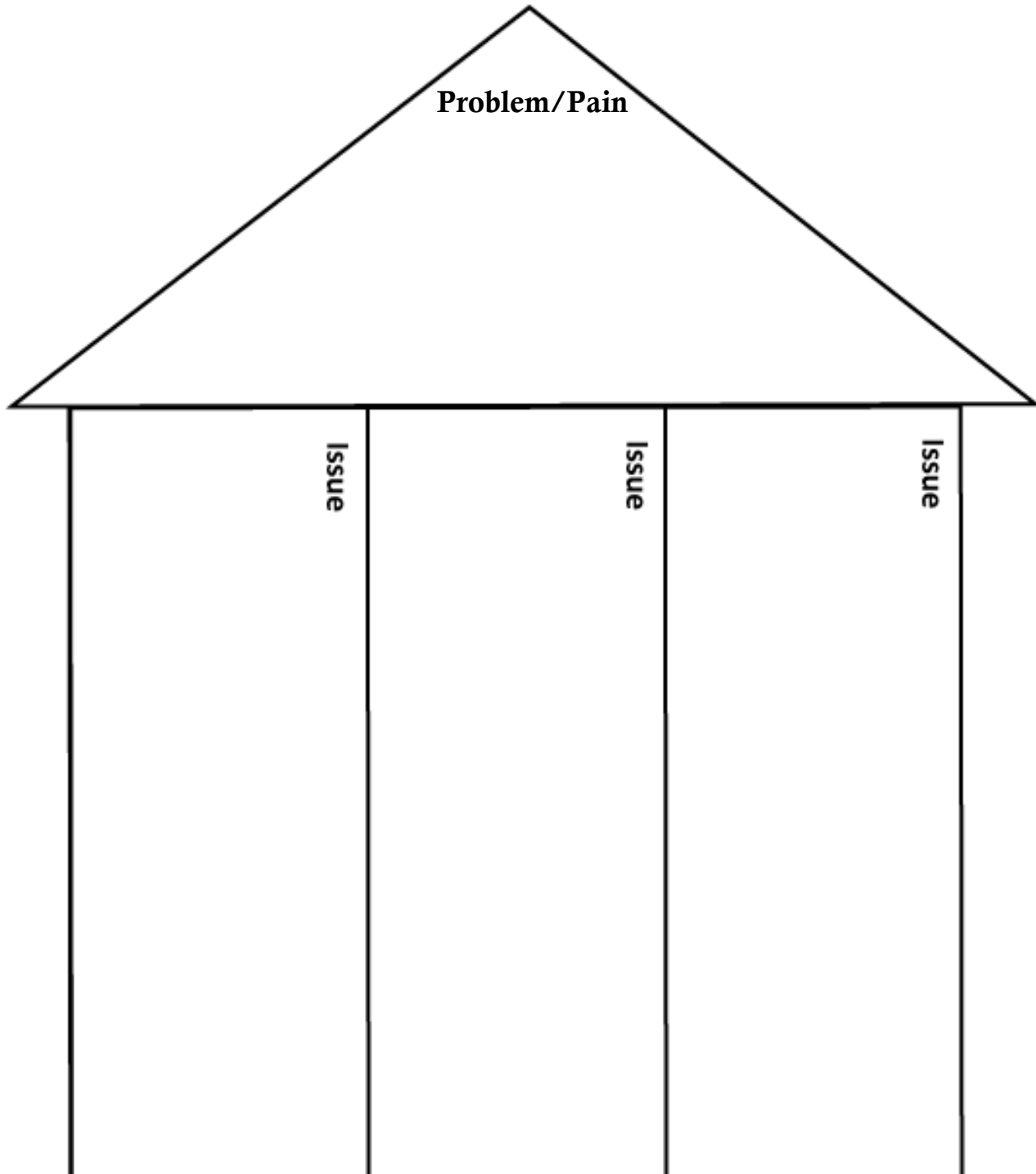


Problems vs. Issues:

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			

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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...

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.



CAMPAIGN PLANNING TEMPLATE

Our Issue What is our deeply and widely felt issue? What is our demand to fix the problem?	Targets Who has the power to fix the problem?	Tactics What do we think will move our target? Which tactics fit this situation? What tactics do we start with? [warm] What tactics might we move to if necessary? [hot]



DEMANDS

TARGET

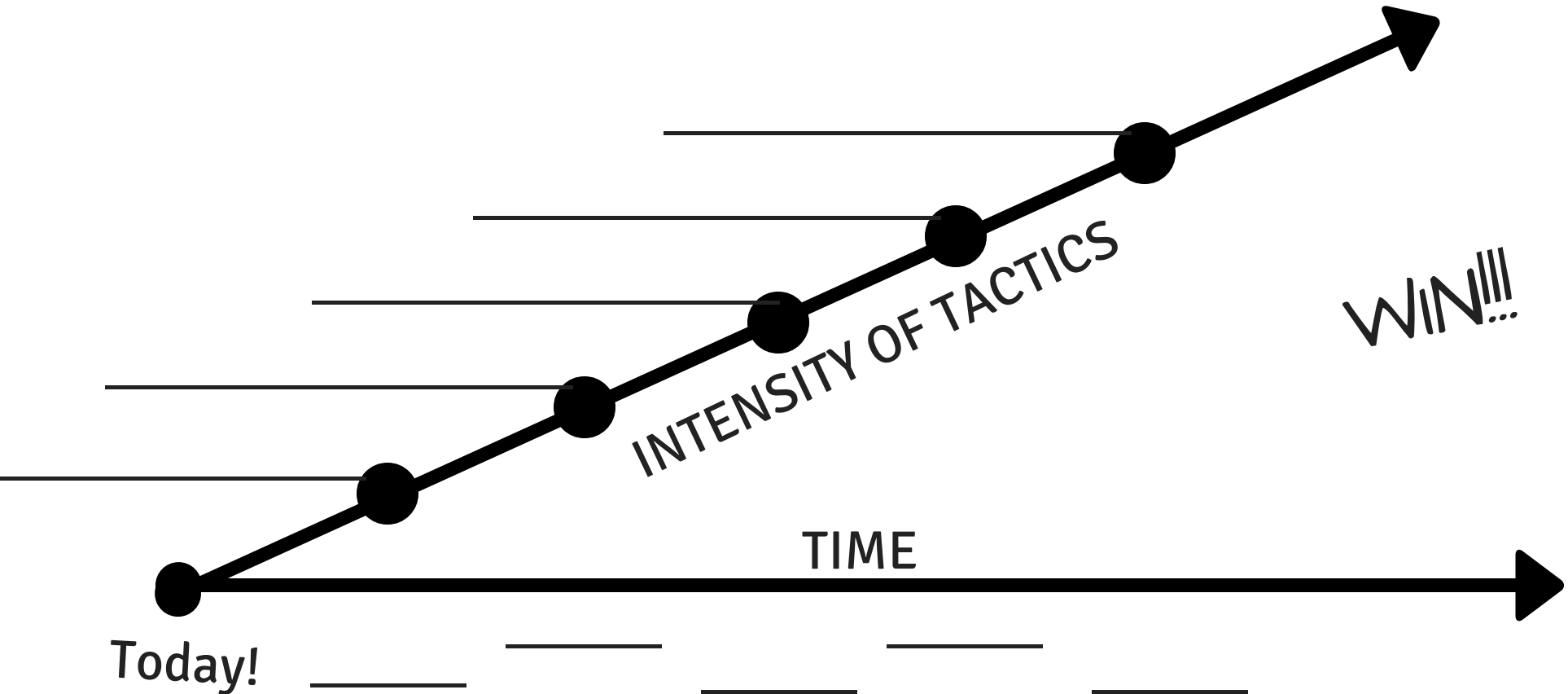
PRESSURE
POINTS

Page 110
ALLIES & ASSETS

Short

Mid

Long





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?





TURN UP THE HEAT: ACTION THERMOMETER

Don't bring out your big guns right away. Start with an easy activity and get lots of people to participate. If that doesn't succeed, gradually increase the intensity of your actions, but make sure you don't leave people behind by escalating too quickly.

One way to visualize escalating tactics is to arrange them on a thermometer, with each action "hotter" than the last. For instance, here are the steps a group of New Haven teachers took to solve the mold problem at their school, beginning from the bottom of the thermometer:



14. Walked out of a meeting en masse
13. Spoke to the media
12. Pulled a publicity stunt
11. Called a meeting of supporters
10. Used the result to formulate specific demands, with deadlines
9. Filed an information request
8. Reached out to parents
7. Published a newsletter
6. Formed a grievance committee
5. Developed a communication network
4. Conducted a health survey
3. Gathered signatures on a grievance
2. Defined their issue: air quality
1. Met as a small group



198 METHODS OF NONVIOLENT ACTION

**The Methods of Nonviolent Protest and Persuasion****Formal Statements**

1. Public speeches
2. Letters of opposition or support
3. Declarations by organizations and institutions
4. Signed public statements
5. Declarations of indictment and intention
6. Group or mass petitions

Communications with a Wider Audience

7. Slogans, caricatures, and symbols
8. Banners, posters, and displayed communications
9. Leaflets, pamphlets, and books
10. Newspapers and journals
11. Records, radio, and television
12. Skywriting and earthwriting

Group Representations

13. Deputations
14. Mock awards
15. Group lobbying
16. Picketing
17. Mock elections

Symbolic Public Acts

18. Displays of flags and symbolic colors
19. Wearing of symbols
20. Prayer and worship
21. Delivering symbolic objects
22. Protest disrobings
23. Destruction of own property
24. Symbolic lights
25. Displays of portraits
26. Paint as protest
27. New signs and names
28. Symbolic sounds
29. Symbolic reclamations
30. Rude gestures

Pressures on Individuals

31. "Haunting" officials
32. Taunting officials
33. Fraternization
34. Vigils

Drama and Music

35. Humorous skits and pranks
36. Performances of plays and music
37. Singing

Processions

38. Marches
39. Parades
40. Religious processions
41. Pilgrimages
42. Motorcades

Honoring the Dead

43. Political mourning
44. Mock funerals
45. Demonstrative funerals
46. Homage at burial places

Public Assemblies

47. Assemblies of protest or support
48. Protest meetings
49. Camouflaged meetings of protest
50. Teach-ins

Withdrawal and Renunciation

51. Walk-outs
52. Silence
53. Renouncing honors
54. Turning one's back

The Methods of Social Noncooperation**Ostracism of Persons**

55. Social boycott
56. Selective social boycott
57. Lysistratic nonaction
58. Excommunication
59. Interdict

Noncooperation with Social Events, Customs, and Institutions

60. Suspension of social and sports activities
61. Boycott of social affairs
62. Student strike
63. Social disobedience
64. Withdrawal from social institutions

Withdrawal from the Social System

65. Stay-at-home
66. Total personal noncooperation
67. "Flight" of workers
68. Sanctuary
69. Collective disappearance
70. Protest emigration (hijrat)

The Methods of Economic Noncooperation:**Economic Boycotts****Actions by Consumers**

71. Consumers' boycott
72. Nonconsumption of boycotted goods
73. Policy of austerity
74. Rent withholding
75. Refusal to rent
76. National consumers' boycott
77. International consumers' boycott

Action by Workers and Producers

78. Workmen's boycott
79. Producers' boycott

Action by Middlemen

80. Suppliers' and handlers' boycott

Action by Owners and Management

81. Traders' boycott
82. Refusal to let or sell property
83. Lockout
84. Refusal of industrial assistance
85. Merchants' "general strike"

Action by Holders of Financial Resources

86. Withdrawal of bank deposits
87. Refusal to pay fees, dues, and assessments
88. Refusal to pay debts or interest
89. Severance of funds and credit
90. Revenue refusal
91. Refusal of a government's money

Action by Governments

92. Domestic embargo
93. Blacklisting of traders
94. International sellers' embargo
95. International buyers' embargo
96. International trade embargo

The Methods of Economic Noncooperation: The Strike**Symbolic Strikes**

97. Protest strike
98. Quickie walkout (lightning strike)

Agricultural Strikes

99. Peasant strike
100. Farm Workers' strike

Strikes by Special Groups

101. Refusal of impressed labor
102. Prisoners' strike
103. Craft strike
104. Professional strike

Ordinary Industrial Strikes

105. Establishment strike
106. Industry strike
107. Sympathetic strike

Restricted Strikes

108. Detailed Strike
109. Bumper strike
110. Slowdown strike
111. Working-to-rule strike
112. Reporting "sick" (sick-in)
113. Strike by resignation
114. Limited strike
115. Selective strike

Multi-Industry Strikes

116. Generalized strike
117. General strike

Combination of Strikes and Economic Closures

118. Hartal
119. Economic shutdown

The Methods of Political Noncooperation

Rejection of Authority

120. Withholding or withdrawal of allegiance
121. Refusal of public support
122. Literature and speeches advocating resistance

Citizens' Noncooperation with Government

123. Boycott of legislative bodies
124. Boycott of elections
125. Boycott of government employment and positions
126. Boycott of government depts., agencies, and other bodies
127. Withdrawal from government educational institutions
128. Boycott of government-supported organizations
129. Refusal of assistance to enforcement agents
130. Removal of own signs and placemarks
131. Refusal to accept appointed officials
132. Refusal to dissolve existing institutions

Citizens' Alternatives to Obedience

133. Reluctant and slow compliance
134. Nonobedience in absence of direct supervision
135. Popular nonobedience
136. Disguised disobedience
137. Refusal of an assemblage or meeting to disperse
138. Sit-down
139. Noncooperation with conscription and deportation
140. Hiding, escape, and false identities
141. Civil disobedience of "illegitimate" laws

Action by Government Personnel

142. Selective refusal of assistance by government aides
143. Blocking of lines of command and information
144. Stalling and obstruction
145. General administrative noncooperation
146. Judicial noncooperation
147. Deliberate inefficiency and selective noncooperation by enforcement agents
148. Mutiny

Domestic Governmental Action

149. Quasi-legal evasions and delays
150. Noncooperation by constituent governmental units

International Governmental Action

151. Changes in diplomatic and other representations
152. Delay and cancellation of diplomatic events
153. Withholding of diplomatic recognition
154. Severance of diplomatic relations
155. Withdrawal from international organizations
156. Refusal of membership in international bodies
157. Expulsion from international organizations

The Methods of Nonviolent Intervention

Psychological Intervention

158. Self-exposure to the elements
159. The fast
 - a. Fast of moral pressure
 - b. Hunger strike
 - c. Satyagrahic fast
160. Reverse trial
161. Nonviolent harassment

Physical Intervention

162. Sit-in
163. Stand-in
164. Ride-in
165. Wade-in
166. Mill-in
167. Pray-in
168. Nonviolent raids
169. Nonviolent air raids
170. Nonviolent invasion
171. Nonviolent interjection
172. Nonviolent obstruction
173. Nonviolent occupation

Social Intervention

174. Establishing new social patterns
175. Overloading of facilities
176. Stall-in
177. Speak-in
178. Guerrilla theater
179. Alternative social institutions
180. Alternative communication system

Economic Intervention

181. Reverse Strike
182. Stay-in Strike
183. Nonviolent land seizure
184. Defiance of Blockades
185. Politically Motivated Counterfeiting
186. Preclusive Purchasing
187. Seizure of assets
188. Dumping
189. Selective patronage
190. Alternative markets
191. Alternative transportation systems
192. Alternative economic institutions

Political Intervention

193. Overloading of administrative systems
194. Disclosing identities of secret agents
195. Seeking imprisonment
196. Civil disobedience of "neutral" laws
197. Work-on without collaboration
198. Dual sovereignty and parallel government

Far too often people struggling for democratic rights and justice are not aware of the full range of methods of nonviolent action. Wise strategy, attention to the dynamics of nonviolent struggle, and careful selection of methods can increase a group's chances of success.

Gene Sharp's researched and catalogued these 198 methods and provided a rich selection of historical examples in his seminal work, *The Politics of Nonviolent Action* (3 Vols.) Boston: Porter Sargent, 1973.

Team Presentations – Presenting, Coaching and Feedback Guidance

Purpose of Activity:

- To generate energy around the plans that have been developed by your colleagues
- Lift up aspects of the plans that others can learn from, and
- Provide feedback to strengthen the plans and offer elements that will stretch learning.
- Celebrate and showcase all the work that was done during the planning process
- Exchange best practices and ideas to address challenges faced by the issue

Presentation Process: 15 minutes per team

Each team will have 10 minutes to present their plan.

Remember to include the following:

- The Issue and the Win
- The Target
- The Campaign Timeline, Escalating Tactics and Corresponding Metrics

5 Minutes of Feedback

The other team will serve as coaches. Coaches will provide feedback for 5 minutes, both reinforcing positive, creative aspects of the plans as well as ways to further improve the plans by offering ideas the team may not have considered.

Remember When Providing Feedback

The following questions can be used to think about the plan being shared. Consider how the team has incorporated skills and techniques we covered over the past two days.

- 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?

Reflections, Connections and Notes for Later