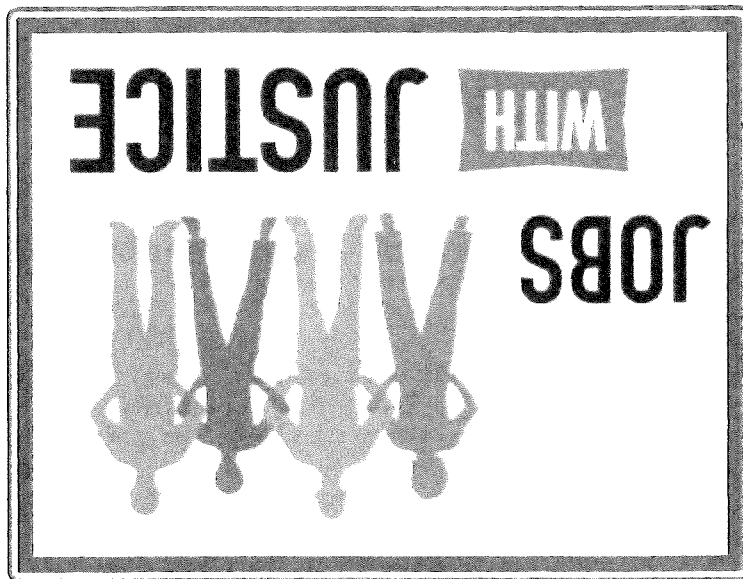


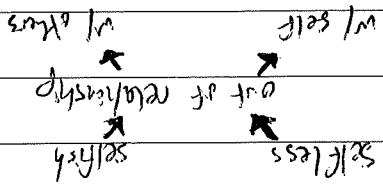
NAME _____

LEADERSHIP & ORGANIZING TRAINING



Agitation → helping someone gain clarity on their values
 "values" → "deeply held beliefs that shape who you are"
 self-interested → "visible manifestation of our values" / being ourselves in
 relationship to others in a way that is aligned w/ our values
 flows → ability to control, create, + prevent change / org. people, org. #

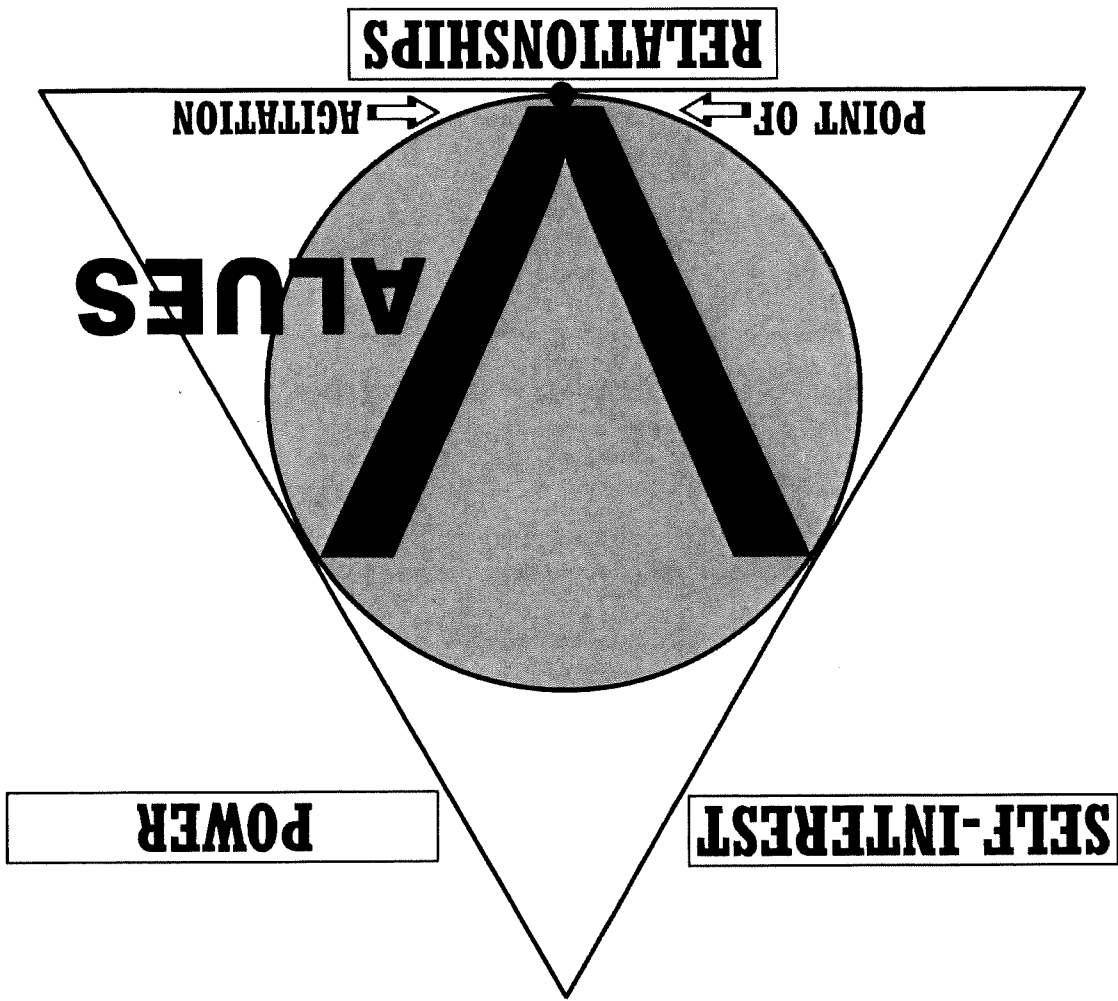
Public vs. Private
 → faith, forgiveness
 → accountable, reciprocal, transparent, long-term arrangements



GOVT	MEDIA	EMPLOYMENT	RELATION	PEOPLE
supervision	transparency	competition	collaboration	cooperation

Notes:

The Values Triangle
Values-Centered Relationships, Power, and Self-Interest
Making change is a function of understanding how these four things interact.



Values Triangle – Relationships, Agitation & Values:

Learn about where organizing comes from and how change occurs. Understand the basics of having an effective and powerful public life by mastering the values triangle.

Organizing is as old as human history. Without years of work by organizers and organizations of the past, the world would be a much more oppressive place than it currently is. **Everything in this society and world that is good and right was won by someone building power and taking action on their values.**

- Every person and organization has a Values Triangle. Understanding that Values Triangle is the key to supporting, defeating or allying with them.

- The Values at the center of a triangle define the kinds of actions and relationships that organization should have.

- Athenian values elevate money over people, attempt to separate us from each other and keep us as confused, frustrated, fearful, destitute and enslaved as possible.

- Our values put people over money and work to overcome barriers and everything that has ever been obtained in our society that is for the good of the people had to be fought for and has to be defended because the Athenians are always at work trying to take any security or solidarity we have away from us.

- We have to have power to defend our values and the more power, relationships and clarity on our self-interest and values that we have the safer we will be and the more the world will reflect our values and not Athenian values and agenda.

RELATIONSHIPS:

List some examples of entities and/people who seek to keep us from being in relationship with each other:

- How do they keep us apart? Be specific as you think about the tactics they use.

- Why do they not want us to be in relationship? Be specific about what the people you've identified want.

AGITATION/VALUES:

List an example of when you were successfully agitated. Why did it work? Who agitated you? Why was it so successful? How does it inform your agitational style?

What issues in your life do you need to be agitated around? What do you need to improve to be a better leader, organizer, activist and/or advocate for your values?

What values do you hold most dear? Why do you do the work you do?

- When we Agitate someone we need to be mindful of the Four "I"'s**
- **Intent:** Know why you are agitating someone.
 - **Incident:** Be focused on a specific event for agitation.
 - **Impact:** Know and explain how this incident impacted our organization, our project/campaign, me, and our relationship?
 - **Invent:** Have a solution that addresses the problem as part of the agitation.

Self-Interest & Power:

SELF-INTEREST:

Give examples of when you've been selfless; i.e. done something for nothing in the public arena of creating change. Write down what you did and why you did it.

Are you sure you were selfless? Remember the definition of self-interest.

Give examples of when you were selfish; i.e. done something purely for yourself without any thoughts of anyone else in the public arena of making change. Write down what you did and why you did it.

How did these actions align with your values? Are you sure you were being selfish.

POWER:

Think about the powerful people on the board and write down how you are like them and define your power base, your ability to control, create and prevent change.

UNDERSTAND:

We Face a Corporate Agenda

- The Corporate Agenda Definition

- The corporate agenda is how corporations and their human owners; organizes their money and capital to defend their core values that places maximizing profits over the welfare of people, society or the environment.
- This is done by controlling public policy, the media, elected officials, advocacy groups, religious institutions and the judicial system, to extract wealth from the public and limit the public's access to living wages, public services and a social safety net. This is done by taking citizens out of relationship with each other, limiting their power to engage in civil society and pitting them against each other to separate them from their values and self-interest.

We Build Movements to Understand, Analyze, Resist, Attack, Undermine and Replace that Agenda.

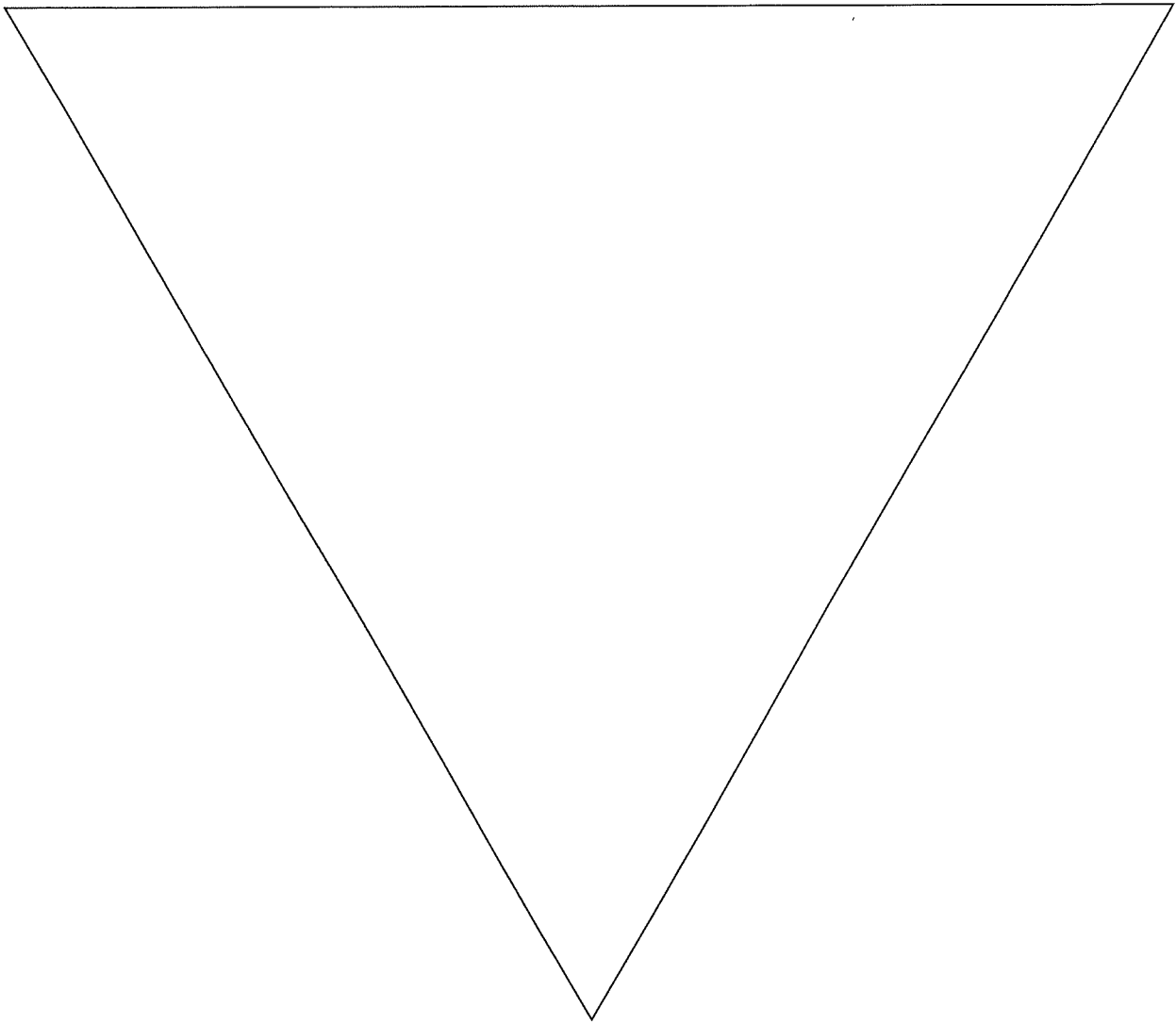
- Movement Building Definition

- Movement building is how people and organizations create sustained relationships to unite across demographic and economic differences around our shared self-interest and common values of human dignity, financial security, social and economic justice and places the welfare of people, society and the environment over corporate profits. We do so by organizing people and money to access public policy, the media, elected officials, religious institutions corporations and the judicial system to control, create and prevent change.

JwJ Triangle & The Corporate Agenda

INSTRUCTIONS

- Construct the corporate triangle
 - Think of two tactics that JwJ's triangle can use to disrupt the corporate triangle
 - Think of two tactics that will allow the agreed upon corporate triangle to disrupt our triangle
- If it is not on the paper it did not happen.**



1:15 → ID foundational values

One-on-Ones:

Your Life Tree - what has shaped your self-interests

YOUR "PUBLIC" PERSON:

The way your experiences and values manifest in the public arena

With whom are you in relationship?

(think of organizations, individuals, your job, and your volunteer affiliations?)

How are you using the power you have?

How you're known by your neighbors and acquaintances?

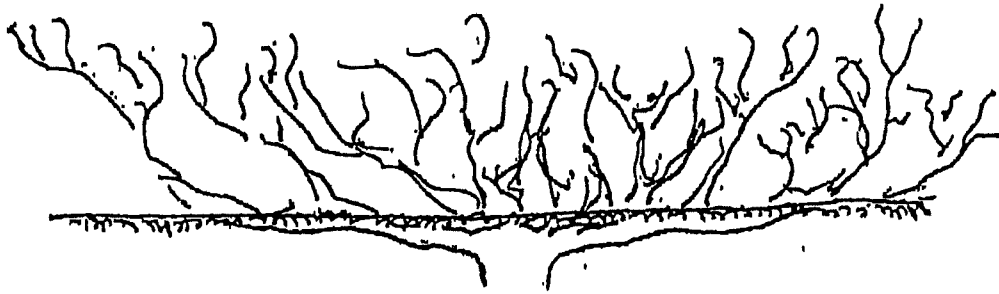


VALUES

What you want your kids to learn so they'll grow up as "good" and confident people.

What you filter your life experience through to guide who you are in relationship with and what you will do to get what you

want.



YOUR "PRIVATE" PERSON:

The experiences that shape you

Your personal history:

What only a few people--mainly family and close friends--know about you.

Your talents and passions.

Those moments that have influenced your life and shaped the way you have grown up.

One-on-Ones:

Your Life Tree

Using a tree as a metaphor for how we shape our lives, we'll describe who we are and why we are the way we are.

- The roots are the experiences that shape us
- The trunk represents the values that we use to filter those experiences
- The leaves are our relationships and identity. They are how we wield the power and reflect our values?

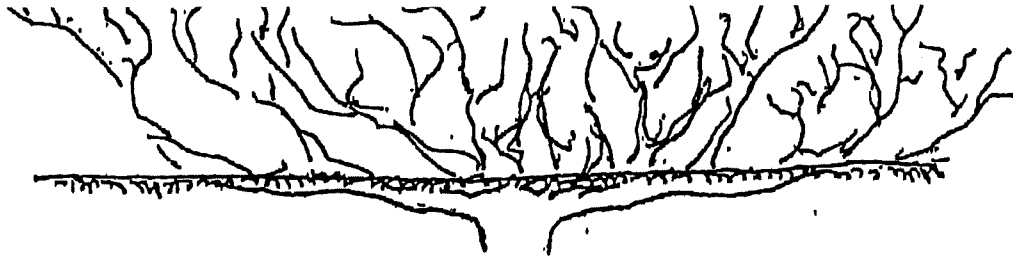
When we examine someone's life tree we are listening for dissonance, places where their leaves do not match up with their trunk or their roots seem to not be in line with their trunk. Are there areas of dissonance in your life? We also are employing active listening techniques.

Draw Your Life Tree

YOUR LEAVES:



YOUR TRUNK:



YOUR ROOTS:



DAY TWO AGENDA

Review

Personal Mastery & Effective Meetings

Break

Defining Issues and Taking Action

Lunch

Power and the Power Analysis

Break

Organizing Money

NOTE: Last five minutes of each session should be set aside for participants evaluation of that session.

ACTIVE LISTENING TIPS

Active Listening:

Paying careful attention to what another person says, means, intends and feels and responding in a way that lets them know that they are heard and understood.

- We are seeking to build trust and empathy within our relationships.
- We want to acknowledge the emotional content of what the speaker is trying to convey.
- We are seeking to be open by being candid, interested and calm, without being judgmental so that the speaker will open up to us.

Basic Skills:

Attending – the act of being physically aware of yourself and attuned to the person you are speaking to.

Body Orientation: Be relaxed by sitting in a neutral position without crossed arms or legs. So don't sit "bolt upright" or slouched back away from the speaker. Instead, when the speaker is addressing you, lean into them without invading their space as you listen.

- **Eye Contact:** Your eyes are your focus, so be conscious that you are taking the time to make eye contact when you are making a point or they are making a point. Don't go glancing about the room or "stare down" down the speaker but use eye contact to bring them back into the conversation and to demonstrate that you are paying attention, primarily to them.

- **Intentional Supporting Responses:** You must show cues that you are listening without interrupting. Nodding your head to show you understand a point they are making, allow yourself to show an appropriate emotion, a smile, a laugh, a look of concern or interest that mirrors what's happening in the conversation. Commit to the conversation and verbally, cues like an occasional "uh-huh" or "hmm", can keep the other person connected to you.

- Engaging – the act of vocally checking in with the speaker to demonstrate you understand both the information and the emotional content they are conveying.
- **Acknowledging:** State how the speaker seems to be feeling. This allows the speaker to discover or more fully release the feeling, demonstrate that you are empathetic and could allow them to get at some other problem. It also gives them a chance to clarify how they really feel by correcting your interpretation of their vocal and emotional pitch.
- **Example:** "You seem to be feeling..."

- **Delegating:** Place responsibility for the solutions or ideas back on the speaker in a way that involves them in the solution by eliciting ideas that the speaker might already have and may help the speaker understand how difficult or possibly easy, the situation is for them to resolve. It demonstrates that you are not only listening but identify with the need for a solution instead of just complaining about the situation.
- **Example:** "What do you think should be done? Have you tried to do anything about this? Does this remind you of other situations that you've had to solve?"

- **Encouraging:** Ask the person to give you more information from their point of view to demonstrate that you've heard something you think is significant and allows them to vent negative emotions or go deeper into memories, stories or perceptions.
- **Example:** "What specifically happened? What do you think happened? Say some more about that?"

ACTIVE LISTENING TIPS

- **Identifying:** Listen for “emotional” or “feeling” words and observe how they sound and look as they speak. This is the act of “reading” a person, while sharing information that is being conveyed in the conversation.
 - **Example:** “You know, your boss taking your sick days like that would make me angry. How is it impacting you?”

- **Paraphrasing:** State in your own words what you’ve just heard in a more specific way that raises important issues and/or brings clarity to the speaker while demonstrating that you understand what they are intending to convey as well as what they are literally conveying:
 - **Example:** “Oh, your boss arrives late everyday but expects you to be on time promptly and the hypocrisy and unfairness makes you angry.”

- **Repetition:** Restate an important point that was said to you exactly as you heard it to make certain you heard it correctly. This is a good way to maintain clarity around difficult or surprising information without sounding judgmental.
 - **Example:** “Did you just say that your boss hates women and is taking it out on you?”

- **Summarizing:** Integrate related points into a single idea that highlights areas of agreement or disagreement, while creating the groundwork for deeper discussion on the point.
 - **Example:** “So because your union local doesn’t communicate with you except in times of crisis and doesn’t respond to your questions or concerns and only interacts with you when they want something, you think that they don’t care about you at all?”

PERSONAL MASTERY TIPS

- **Personal Awareness - Bringing Your Best Person to the Situation**
 - Empathy – Speak to others the way you want to be spoken to.
 - Body Language – Are you facing everyone, are you frowning? Be aware of your body language and facial expressions and how they could be impacting others. Are you withdrawing physically?
 - Connection – Are you talking to the others or are you alone in this group? Are you giving ideas?
 - Reaction – Are you listening? Watch your feelings? Are you feeling valued & respected?
 - Presence – Are you inspiring others by your behavior or are you behaving badly?
 - Stepping Up and Stepping Back – Are you contributing without dominating or silencing others?
 - Be aware of what is happening in the space and fill the need. Does it need facilitation (keep it moving and open)/peacekeeping (keep it calm and less judgmental) or direction/leadership (give it a point)? Are there others talking a lot, while other needs need to be filled (note taking, time keeping, etc.) that you could help with?
 - Check with the group to make sure you are in the right role. Be prepared to switch roles.
 - Remember the goal of the group and its values.

WAIT → Why am I talking?

PERSONAL MASTERY TIPS

- **Practice Active Listen:**
 - Restate what they say to be certain you are hearing what they are saying.
 - Identify supportive and dissenting points
 - Solicit feedback. Ask others "Does this make sense?" This question makes sure that everyone is paying attention and does agree or has the space to disagree.
 - Test for agreement, make sure going forward you are on the same page. Try asking does everyone agree? Being direct is a useful tool because it keeps everyone clear.
- **Do not monopolize the conversation.**
 - Get the other person to comment throughout the event.
 - Make sure they know they are heard.
 - Discourage/limit negative feedback. If there is an insolvable conflict mark it don't fight over it.
- **KNOW Your Triggers and Remember Why You're Part of the Organization**
 - Do not act from a place of anger. If you are angry do not proceed.
 - It's a biological reaction, breathe and calm yourself.
 - Remind yourself of your purpose and focus on being thoughtful not triggered.
 - Remember that tension is natural and can be used constructively by acknowledging it.
 - Don't assume polarization, there doesn't have to be a winner and a loser you both want to win and share values.
 - Be open to being proven wrong in your accountability session.
 - It is easy to abuse the power of accountability. When you in the "right" and must hold someone accountable for clearly doing wrong you are not out to tear them down or release your anger. You are out to point out the problem and invent a solution that helps both of you work better together.
 - Be mindful that you are building a bridge not attacking an enemy.
 - Know the difference between malice and ignorance.
 - Remain neutral, you cannot control how the other person will take what you are saying.
 - You can't let them being upset stop you from being clear.
 - If you are triggered voice how you are receiving the comment and ask for clarification.
 - If the answer continues to upset you request that you move on and get back to the issue at hand and acknowledge that you will deal with it later but not in this conversation.

Notes:

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

- When we have bad meetings people cannot connect or take action together because meetings are where we connect, build power and plan for crisis and to decide how to use our power.
- We never have a meeting unless afterwards we are going to do something with, for or to someone.
- Most of our meetings start in small groups. Small group dynamics are very important to us.
- Our meetings must respect our people's time.
- A good meeting has the following components:
 - A pre-meeting
 - A clear agenda
 - Leadership involvement and development
 - It's open to your base (e.g. has translation, child care, isn't held while people are at work)
 - Discipline and accountability (e.g. ground rules or working agreements, follow-up on commitments that people make, facilitation that checks people's personal mastery)
 - Action – An action step that you'll be able to take on collectively after the meeting
 - Evaluation and debrief

What is the POP MODEL*?

A simple yet powerful tool for focusing actions on creating results

What it can do

This tool can assist you to:

- Help others and yourself get clear on the purpose and outcomes of any intended action
- Help instill in individuals, teams and organizations an ongoing discipline of focusing on results rather than activity
- Create more real results with less effort

When to use it

- o When initiating any purposeful activity – small or large: a telephone call, an entire meeting or a single agenda item, a campaign tactic or the whole campaign, a training or a training module, a program or organizational initiative, etc.
- o When coaching or training individuals or groups to be more effective

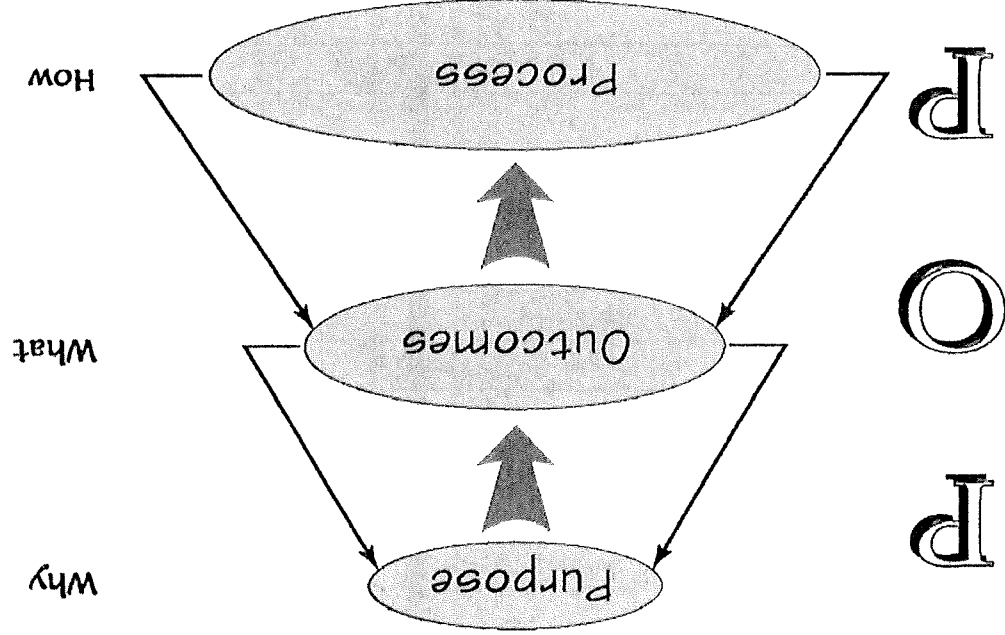
How it works

Before initiating an activity, address three questions:

Purpose: Why? Why are we undertaking this? What is the purpose?

Outcomes: What are the specific outcomes we want to accomplish as a result of this action?

Process: What steps will we take to achieve these outcomes and fulfill the purpose?



THE POP MODEL AND MEETING PLANNING

We want our meetings to be a productive use of our time and energy. On average, people at work spend 37% of their time in meetings. But according to research, up to 50% of that time is wasted. Think how many times you have been in meetings with people giving reports of no real interest except to the people talking.

The POP model is perfect for ensuring highly productive meetings. The purpose and outcomes for the overall meeting should be clarified. Then – here's the breakthrough notion:

No item should go on the agenda without:

- 1) a clear purpose and specific outcomes that are worth the time and attention
- 2) a process that will likely achieve the purpose and outcomes in the allotted time

Critical questions regarding **Purpose** in planning a meeting agenda:

- 1) Is the Purpose clear?
- 2) Is the Purpose relevant and of interest to most of the people attending?
- 3) Is the Purpose sufficient to warrant the investment of time? (Multiply the number of people attending x the amount of time allotted to calculate total organizational energy.)

Critical questions regarding **Outcomes** in planning a meeting agenda:

- 1) Are the Outcomes clear and specific? A useful guide to action?
- 2) Do the Outcomes advance the Purpose?
- 3) What would success look like? How will you know if you have accomplished your Outcome?
- 4) Are the Outcomes of sufficient importance to warrant the investment of time?
- 5) Are the Outcomes realistic given the amount of available time and the information/expertise present in the room?

Critical questions regarding **Process** in planning a meeting agenda:

- 1) How exactly will the Process deliver the outcomes?
- 2) What kind of facilitation will be needed to insure success?
- 3) Where might there likely be breakdowns in the Process?
- 4) How will you handle breakdowns if they arise?

Walk through the Process you plan to use in the room, and see if you think it likely to deliver the outcomes you want. If not . . . Find another process. Or don't waste the group's time.

* **REMEMBER:** Create the POP for the meeting in its entirety. Then create a POP for every single agenda item.

** Adapted from stproject.org/resources/tools-for-transformation ©2013 Robert Glass*

Effective Meeting Tips

- Encourage silent members to speak their mind
 - Allow for direct responses only when needed
 - Solicit feedback
 - Round robin, calling on everyone in turn, can create space for people who are uncomfortable speaking in groups
- ### Manage conflict
- Remember that tension is natural and can be used constructively
 - Don't assume polarization, there doesn't have to be a winner and a loser
 - Good conflict management requires creativity, experience and trial and error
 - Discourage and limit negative feedback
 - Remain neutral. If you feel too strongly about an issue, ask that someone else facilitate that part of the meeting. It is easy to abuse the power of facilitator
 - Make sure people are all hearing the same thing
 - Check in with a summary of what the group has said or decided
 - Identify supportive and dissenting points
 - Clarify and rephrase comments for the group as needed
 - You are controlling the meeting only with the consent of the participants, be open to hearing criticism and suggestions
 - If everyone is saying the same thing, ask for other opinions
 - If everyone is in agreement, respect the groups time by moving on
- ### Be in Control of and Aware of Yourself
- Be aware of how your body language and voice affects yourself and others.
 - Think and listen before you speak, be aware of your best person.
 - Come prepared to participate by knowing what the meeting is about.
 - Have discussions not arguments, unless the disruption is part of plan.
 - When you feel angry check in with yourself, write down what is upsetting you and find a way to answer it.
- ### Pace and control the meeting
- Schedule breaks and time to keep people energized
 - Keep items to time limits set forth in agenda
 - Start and end the meeting on time
 - Plan the meeting agenda before meeting starts
- ### Introduce and approve the agenda and goals for the meeting
- Clarify responsibilities of group members
 - Timekeeper
 - Note take
 - Speaker's List: Know who is speaking, what they are to say and how long they will be speaking.
- ### Keep the discussion on topic
- Restate ideas on table for everyone to hear
 - Separate side issues and address topics one by one
 - Use a "parking lot" for off topic conversations
- ### Equalize participation
- Make sure everyone is heard
 - Keep a speakers list if necessary

Defining Issues and Taking Action

Problems vs. Issues

Problem → societal / Issue → tangled & solvable
 Issues move people to action
 ↳ concrete solution is part of a societal problem

Examples of Problems

Examples of Issues

Criteria for Choosing Issues

Specific → clearly defined, focused & strategic
 Winnable → able to make progress, demonstrate impact
 Significant → should engage people's values & give them a reason to want change
 Clear target(s) → decision maker with a face that can give you what you want

Additional Notes for Defining Issues

"Cut" → agitational phrase that creates a moral crisis in the listener & demands action
 "Tell Mayor Lucas to stop putting people on the street - pass right to counsel!"

Defining Issues – The Scenario

In your mid-sized city, there is a non-union company called Marlon Contractors that does bits of commercial and residential construction, but the biggest part of the business is in commercial painting and maintenance. Marlon Contractors regularly underbids and wins government contracts for building maintenance on libraries, schools, and jails. Most of the workers are immigrants with a mix of documentation statuses.

The workers feel like the Marlon use immigrant workers, but also feel like they have good jobs because the work is steady. Supervisors discriminate openly: requiring sixty-hour weeks while claiming that “you don’t qualify for time-and-a-half overtime because of your visa status,” or only giving white workers sick days while saying that “Mexicans are tougher and don’t need it.” The Colombian and Guatemalan workers are also denied sick days; they joke with each other about whether the supervisors think they’re tough, too, or just can’t tell the difference between one Latino and another. When workers try to speak up, supervisors harass them by shorting their hours or withholding necessary equipment, especially personal protective equipment. Workers often hear threats from supervisors like, “I wouldn’t make too much noise if I were you because immigration might show up...” or “If you keep complaining, maybe we will have to have the office recheck your paperwork...” or “I don’t want to, but maybe we need to sign up for E-verify...”

At least some of the government contracts that Marlon Contractors wins are supposed to have job quality standards. There’s usually no real enforcement, though – the government checks the paperwork, but doesn’t do any independent monitoring, and only investigates complaints when they come from other contractors, not from workers or community members. If Marlon Contractors were found to have violated job quality standards, then in theory they could immediately have their contracts terminated.

A small group of Marlon’s workers have made contact with the local organizer for UPAT (International Union of Painters and Allied Trades). They’ve only just started talking, and they’re not sure yet if they can get a majority of their coworkers on board with a union, or how long it will take. They have been keeping track of how much unpaid overtime they’ve racked up, and they know that almost all of their coworkers are owed overtime, as well.

People and Organizations

David Warner is the **County Administrator**, a civil service job that puts him in charge of most of the county’s day-to-day operations. This includes contracting, record-keeping, overseeing most County departments, and various administrative work. His position is hired by the full **County Council**.

Idelfonso Gutierrez is the core leader of the Marlon’s workers who approached UPAT. He’s undocumented, but pretty sure that Marlon Contractors doesn’t know it because he uses his cousin’s paperwork. He’s naturally quiet and initially didn’t want to rock the boat, but he joined the organizing effort when he started looking at getting a bigger apartment as his kids get older – and how hard that will be if the company keeps stealing his overtime.

IUPAT DC 38 (International Union of Painters and Allied Trades, District Council 38) is a union that represents painters, wall coverers, flooring installers, and more. They're a long-time [W] member union. They haven't done much new organizing until recently, so Marlon Contractors will be their first really hostile contractor.

Jimmy Walsh is a **County Councilor**, one of the seven elected Councilors. He comes from a building trades family, and has been making noise about ensuring that more County dollars go to creating good union jobs.

La Casa de la Familia is a Spanish-speaking immigrant focused social services organization. It's well known and respected in the community. They provide job placement services as well as pro bono legal aid for immigration cases – applying for various forms of status, fighting deportation orders, and so on.

Marlon Sanchez is the owner of **Marlon Contractors**. He likes to flaunt that he is an immigrant himself, and sees himself as the example of the American Dream where anything is possible if you just pull yourself up by your bootstraps. He lives in the suburbs.

Your Job for the Exercise

You are thinking of yourselves as Jobs With Justice for this exercise – a coalition of labor, community, faith, and student-and-youth organizations that support one another in fights for justice on the job and in the community.

On your paper, put the following:

- Identify the problem
- Define an issue that is specific, winnable, significant, and has a clear target
- Create an issue cut
- Identify your target(s)
- Identify your allies
- Identify one way the wall of corporate control will make it harder for you to win your issue

Power and the Power Analysis

- A power analysis is art of examining the triangle of an issue, organization and individual and finding points of agitation, weakness, strength and connection so that you can use it to control, prevent and create change and make rational decisions about what you can and should do.

- A power analysis is the ability to understand everyone's triangle within a clearly identified issue. If you don't have an issue, something that is specific, significant, winnable and has a clear target you will not be able to figure out what's really happening, why anyone is doing what they are doing or what they are likely to do.

- Power Analysis allows you to build a web of relationships with enough power and self-interest to overwhelm your opponents and win your issue.

- A power analysis helps you figure out exactly which triangle you are actually facing. Sometimes you have the wrong triangle.

Notes:

1. ID problem

2. Define your issue

3. ID your target + build their triangle

4. Dig into your triangle

5. Build a strategy (based on triangles)

6. Pick tactics that understand triangles + build power through action

7. Create structure

Power and Power Analysis – Scenario

You are leaders of a local Jobs With Justice chapter.

Teresa has been working as a nurse at a long-term private mental health facility, Bauer Park, for eight years. Bauer Park used to be an independent facility until three years ago, when it was bought by Health Services Inc., a private, for-profit corporation which manages hospitals, nursing homes, and other health care facilities in several states, and is not headquartered in your city. One afternoon Teresa witnesses one of her fellow nurses, Tom, abuse a patient. Teresa reported the abuse immediately to her supervisor Lauren, and repeatedly up the chain over the next few weeks because she never saw any action to discipline this co-worker. The third time she reported the abuse, she was fired for “not reporting patient abuse in a timely manner.” Her union, Nurses’ Local 123, calls the jobs with Justice Workers’ Rights Board.

Your job is to figure out why Teresa was fired and come up with a plan to get her job back.

On your paper you will put:

- Why you think Teresa was fired
- Who you think can re-hire Teresa
- Draw JJ’s triangle (as it relates to getting Teresa’s job back)
- Draw the triangle you intend to disrupt to get her job back – whether that’s a specific person, organization, etc
- A plan for how you will use your base, allies, and relationships to get Teresa’s job back

Additional information:

- Your group will start with one sheet of information.
- There is more information in envelopes at one of the trainer tables
- These envelopes represent different activities to do for power analysis. They are:
 - Relationship Inventory
 - Issue Background & System Landscape
 - Media Survey
 - Canvassing & Door-knocking
 - One-on-Ones
- Every five minutes during the exercise, you will be allowed to send someone up to grab two additional pieces of information from any of the envelopes (or different envelopes

Power Analysis Pointers

Power analysis is the art of studying someone else's triangle, the effects of their triangle on the real world, and how that triangle is perceived.

- What do they have the power to do?
- Who are they in relationship with and how strong and/or personal are those relationships?
- What self-interest motivates them to take the actions they are taking?
- What values have they expressed in action and in writing?

We do analysis

- To ascertain what we have to do build the relationships and power we will need to prevail.
- To identify who the stakeholders are and what are their real and perceived stakes.
- To develop strategies and tactics to effect change.
- To divide stakeholders into possible allies, targets and enemies.

In an analysis you identify

- **Stakeholders:** Anyone that has something lose or gain in a situation is a stakeholder. The "stake" they have is their self-interest or comes from their values.
- **Allies:** Anyone whose self-interest or values are in alignment with the goal you want to accomplish.
- **Targets:** Anyone who can give you what you want or can act on the entity that can give you what you want.
- **Enemies:** Anyone whose self-interest or values puts them at odds with your goal.

The Process:

- **Issue/Goal:** Gather information on your "issue" itself from a variety of points of view. Identify as many stakeholders as you can.
- **Materials:** What does the group or person you are studying say about itself - use websites, promotional materials and the like.
- **System Landscape:** Find out the process needed to effect change and identify who has to do what at every step of it.
- **Relationship Inventory:** Discover how the stakeholders are connected to each other. Know who is in your leadership and base and how they are connected to system landscape and other stakeholders.
- **History:** See if what you want has been tried before and find out who were the stakeholders at that point.
- **Media:** Gather as much information on the issue and the organization as you can and pay attention to how they are being covered in the media.
- **Canvass and One on Ones:** Interview as many stakeholders as you can to identify possible allies, targets and enemies from the identified stakeholders
- **Power One on Ones:** Structured conversations with people identified in your system landscape to examine their triangle in regards to your issue. You do your homework, the system landscape and media survey before you talk to them and see where they stand in relationship to your possible defined issue(s).

Organizing Money

Organizing Money Notes

A Practical Exercise in Organizing Money:

Each group represents a different organization with different bases, issues they work on, finances, and relationships.

There are five major funders around the room with a limited amount of money each. They are: the Council of Churches, the Community Foundation, the State Policy Institute, the Central Labor Council, and the Chamber of Commerce Foundation.

There is a Grassroots Fundraising Committee; you can talk to them about your plan for grassroots fundraising based on your organization.

Your organization's sheet contains information on the actions you want to take, the budget you need to raise, the characteristics of your base, and your relationships with the funders.

On your sheet of paper, put the following information:

- Your organization and funding goal
- Your fundraising plan for your base
- How much you got from each funder, why they gave, and what activities they will be funding

*Resource Generation (org. - redish, grassroots/wealth)

Organizing Money Tips

ASK for the donation. When you ask, be quiet and let the donor say “yes” or “no.”

Stress the need – every donation is an appeal for our values.

Remember that donors WANT to support their values.

Don't lie. Dishonesty and a lack of integrity will pave the way to failure in the long-term.

* Know your organization, its values, self-interest, or issues. If you don't know something, say that you will get the information for the donor at a later time.

Don't make assumptions. Build relationships that allow you to ask with confidence.

Don't ask for too little. Be clear about what you need. It's better to ask for too much than too little as long as the ask is reasonable.

Be persistent. Keep asking. The time may not have been right. Tomorrow, the circumstances may be different. Remember, 50% of face-to-face asks are successful!

Don't stop at “yes” or “no.” If you get the gift, you have identified a person who may give to you again. Thank them, let them know how helpful their gift was, and ask them for more in a suitable timeframe. If you got a “no,” understand the circumstances and seek to make the changes necessary to get the gift later if appropriate.

Enjoy yourself. You are engaged in direct action. You are empowering people to make their values real.

DAY THREE AGENDA
THE FINAL DAY

Review

Campaign Game Part 1

Break

Campaign Game Part 2

Pick up Lunch

Call to Action

Celebration/Clean-Up

Campaign Game Part I

Campaign Building Notes

The Campaign Game:

The Situation

The Big Weenie Hotdog Plant has employed a workforce of 10,000 people for over 60 years in the Oakwood neighborhood right on the river. Its owner **Jack Hamburger** is thinking of closing it because of pressure to meet environmental regulations and a volatile union election going on inside his plant. If it closes 10,000 union jobs will go away at a time when the likely new union leadership wants to join JwJ. There are also powerful political forces swirling around the area with some factions wanting to tear the plant down to create a **Riverwalk Development** or the **21st Century Transit Park Project** or keep it open as part of the **Balanced Communities Initiative**.

A Practical Problem: The Big Weenie Hot Dog Plant

The Big Weenie Hotdog Plant has employed a workforce of 10,000 people for over 60 years in the **Oakwood** neighborhood right on the river. It sits in a historic location and its architecture is so unique, beautiful and unusual that the **Hilltopia Register Historical Society** has said it might be a historic preservation site. Its owner **Mr. Jack Hamburger** is a third generation owner of the plant and a fixture in the neighborhood, coming from the **Hill** the wealthy part of the area that he only recently left to move to the far northern suburbs.

The Big Weenie is known for the specialty meats and services, such as dressing venison, it provides to celebrities, athletes and the powerful who have created a nationally known foodie group of the powerful called the **Chowhound Connoisseur Club**. Many of the yuppies moving into the area love the specialty meats and want to join the **Chowhound Connoisseur Club** but the club is very discriminating.

Mr. Hamburger is resisting upgrading the plant's pollution controls. He also angry that the once reliable house union **Local 13** has suddenly begun fighting him about the conditions in the plant, instead of doing whatever **Mayor Chris Champion** told them to do. Between the community's complaints and the new union leadership's backbone he's now threatening to sell the **Big Weenie** to developer, **Bubba Klingonski**. Some of the most famous members of the **Chowhound Connoisseur Club: Marcus "the Ghost" Bannon** Hilltopia Bears running back and his team mates and the chefs **Wolfgang Hauser** and **Mama Ribeye** have publicly called on **Mr. Hamburger** not to close the plant.

The neighborhood around the **Big Weenie** is gentrifying, driving out many of its' solidly working class employees and endangering the very existence of the **Filiberto Ojeda Rios** public housing complex that sits near the plant on the river with a perfect view of downtown **Hilltopia**. The upper class and just plain rich residents have formed the **Oakwood Homeowner's Association**. There is serious friction between these two groups.

The two major pastors in the area, **Rev. Dina Jefferson** who runs **Mercy Lutheran Church** and **Father Mike Johns** who runs **St. Sylvester Catholic Church** are very engaged in fighting gentrification and many of their parishioners work at the **Big Weenie**. If the plant closes they will lose their congregations. The **Oakwood Chamber of Commerce** is worried that if the plant closes it will cast a lot of people into poverty when they lose their jobs, which will harm their customer base.

A Practical Problem: The Big Weenie Hot Dog Plant

The residents of the public housing complex have long complained about the occasional odors that come from the plant. **State Rep. Jesus Rojas** a former resident of the public housing project, and a small organization called **Blocks Forever** has come to their aid. They are demanding that **Mr. Hamburger** put in place/update the anti-pollution devices that he should legally already had in place to abate the smell and protect the river five years ago. If he will not do so they want the plant closed. Here they agree with the **Oakwood Homeowner's Association** and their pro-gentrifying and development elected official **Ald. Mia Strickland**. The **Oakwood United Neighborhood Association** (OUNA) a long-time community organization that has a reputation for reducing gang violence and keeping Oakwood economically and racially diverse, is trying to mediate the conflict between **Mr. Hamburger** and the environmental forces. **OUNA** has been a backer of the **Balanced Communities Initiative**.

The **Oakwood Homeowner's Association** believes the plant is driving down their property values. They would like a **River Walk** development put there instead. The **Filiberto Ojeda Rios** public housing complex stands on the choicest point of the **River Walk Project** and the driving force behind the effort to create the **River Walk**, close the plant and drive out the working class and public housing residents is **Bubba Klingonski**. **Bubba** is a close ally of the **Mayor Chris Champion** and sees this area of the city as a bonanza for development. He has even gone so far as to promise that qualified public housing residents will be allowed to live in scattered site housing he will build in the area. **Blanca Ramirez** the leader of the **Filiberto Ojeda Rios Association** is excited by getting new housing but some of her members do not want to lose their community.

The politics around the **Big Weenie** are complicated. **Ald. Mia Strickland** has been clashing with **State Rep. Jesus Rojas** to the point where **State Rep. Rojas** is circulating petitions for **William Rucker of Northside Community Club** to be the new alderman and she is now raising money for **Jason Holt III** to be the next State Rep and replace **Jesus Rojas**. **Rucker** is promising to bring new, good union jobs to the area via the **21st Century Transit Park**. **Jason Holt III** of the **Oakwood Homeowners Association** is running on public safety and economic development via the new **River Walk**.

Adding fuel to the fight is the **Balanced Communities Initiative**, a city wide referendum that if passed will be a brake on gentrification by protecting local businesses from chains, creating sets aside units of affordable, subsidized and poverty-level housing in every ward and new development as well as requirements for green space, pollution controls and renewable energy in developments. The **Common Good Community Organization** has been fighting the **Oakwood Development Cooperative** in Oakwood, and the **American Chamber of Business** all across the city. This fight could make or break the **Balanced Communities Initiative** in the city. The **7th Ward** has become the key battleground for the fate of the initiative. If it passes here the **Mayor** will be in trouble.

A Practical Problem: The Big Weenie Hot Dog Plant

Mayor Chris Champion has detailed one of his most sinister operatives to make certain that the Balanced Communities Initiative fails; Niko Tsongas, former Hilltopia County Attorney General and Champions of the City Leader, is working with Tim Regert's Oakwood Development Cooperative to bring a Riverwalk to Oakwood and there is the possible fall back of the 21st Century Transit Park Project but the Mayor is clear that he would prefer the River Walk.

Ald. Strickland, is positioning herself as a Democratic champion of development, banks, and business projects, and is becoming a cause celeb for some conservative activists and organizations and it is said that she has a huge war chest and has her sights set on Congressman Kendrick Dickerson's seat in a couple of election cycles. If the plant closes and nothing happens in its place Ald. Strickland will be in a terrible position to run. She has been in talks with Mike Kingman about the 21st Century Transit Park.

ASK #1

Rev. Thomas Willis has been recruiting new faith leaders into [wj]. He wants [wj] to work with Rev. Dina Jefferson of Mercy Lutheran Church to improve the working conditions in the Big Weenie by getting the State Department of the Environment to either enforce worker safety regulations or close the plant for violating those laws immediately.

ASK #2

Marjorie Hope of the Common Good Community Organization wants [wj] to meet with Mona Kaplan and work with her to keep the Big Weenie open as part of the Balanced Communities Initiative to support stable, economically diverse neighborhoods.

ASK #3

Mike Kingman of Labor Leaders for Progress wants [wj] support the 21st Century Transit Park Project and its plan to convert the Big Weenie into a Self-Driving Bus Plant. He has the support of Congressman Dickerson and promises that he can bring the Labor Leaders for Progress into [wj] if they can get the 21st Century Transit Park Project created.

The Campaign Game:

Your assignment is as follows:

1. Identify which "ask" to took and why
2. Identify a problem
3. Identify an issue.
4. Identify a target.
5. Define a cut.
6. Identify your base.
7. Identify your allies.
8. Create a six-month plan with short, medium and long-term goals and some tactics you will use.

If you don't put it on the paper it didn't happen.

Rules:

- You may select five Ally/Base cards and three Research Cards
- 1.) Once you take a card from the envelope you have officially selected it.
 - 2.) You may replace one Ally/Base Card with another Ally/Base Card.
 - 3.) You may not replace any Research Card.

JWJ WORK BOOK APPENDIX

One on Ones – Appendix

PRECISION COMMUNICATION

- A key to an effective one on one is the ability to both listen well and to precisely say what you are trying to convey. Precision communication demands that you do the following:
- Clearly specify the people, places, examples and other references you make by using precise nouns and pronouns.
 - Example: Don't say – "Well he doesn't understand that you want."
 - Instead say – "Your boss doesn't understand that you want more flex-time."
 - Clearly specify the actions, conditions and quantities involved by using accurate verbs, adverbs and adjectives.
 - Example: Don't say – "Sounds like you should take some kind of action." Instead say – "Perhaps you and five or six of your co-workers, who agree with you should meet and start thinking about what you want to do about making the boss understand how you feel."

- Use "pointer" words (Who, what, where, when, how and why), to direct people toward their self-interest, elicit specific information from them and allow them to move toward action.
 - Example: Don't say – "Someone needs to stand up with you on this." Instead say – "Everyone on your job needs this flex-time, if you think that's true, you should to get a meeting together with people who share your point of view in the next two weeks and start planning how you're going to get that flex-time."
- Beware of telling people "why" they should do anything. You have to know someone very well to be able to even attempt a guess at this and an improper guess can create defensiveness and resistance to action.

LISTENING HABITS LESS SKILLED LISTENERS

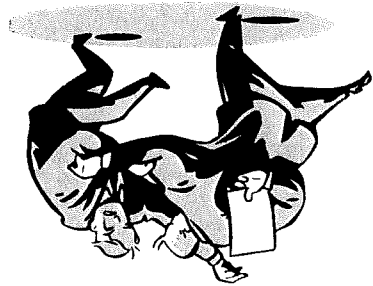
SKILLED

LISTENERS

1. Immediately evaluate what is being said.
 - 1. Suspend judgment and listen
2. Spend time rehearsing what you will say next
 - 2. Focus on what the other person is saying
3. Try to steer the conversation to the direction you want.
 - 3. Listen to where the conversation is going
4. Hear everything through your own frame of reference
 - 4. Enter the other person's frame of reference

5. Disagree with the speaker's point of view
speaker's perspective
6. Try and take in and respond to everything
connections to their life.
7. Allow your mind to wander to other things
person is saying.
8. Parrot back everything exactly as you heard it.
content and meaning.
9. Give little verbal and non-verbal response
intentional responses.
5. Try to understand the
6. Find main ideas and
7. Focus on what the other
8. Reflect their emotional
9. Encourage speaker with

Ten Ways to Kill a Meeting



1. Don't come to the meeting. If you do, come late! If you come late make sure you disrupt the meeting in order to make sure that your presence is known.
2. Don't listen intelligently to your opponents' arguments. They may convince you.
3. Attack all the opinions of other group members, if they are not your opinions they must be wrong.
4. Get your personal feelings off your chest, even if they are unrelated to the question being discussed.
5. Use every opportunity to arouse support from the group for your very own special interest.
6. Be Pessimistic about any new plan proposed at a meeting that is not your own, since the plans of others never work!
7. Don't offer your opinions. Then complain that the group is being run by a clique.
8. Take advantage of the speaker's necessity for breathing by interrupting her/him before they can make their point.
9. Once you have made up your mind, do not allow yourself to be confused by the facts.
10. Make as much noise as possible and then complain that the chairperson does not control the meeting.

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Power and the Power Analysis – Elements and Tips

- **Basic Research:** You find out how people feel about your possible issue(s) and are gauging interest in taking action.
- **Surveys:** A neutral tool that allows people the freedom to answer exactly how they feel. You are looking for values and self-interest with a survey.

- **Door-Knocking/Canvassing:** You are testing for possible defined issue(s) in direct relationship to the values and self-interest of people you contact.
- **One on Ones:** Examine the individual Triangles of the people you will be in relationship around the issue(s) you've defined.
- **Issue(s) Definition:** Discover what it is you want to change.
- **Goal Analysis:** Understands how the system "officially" works as it regards the possible issue(s) you want to change.

- **Power Research:** You measure the history, relationships and self-interest that are already at work on your issue.
- **Media Study:** Know how the media has reported on your possible issue(s) for the past several years. This can help you identify people to talk to when you do your power 1 on 1's, who might be an ally, who were leaders on this issue and it could help shape your strategy or tell you why other strategies failed.

- **System Landscape:** Understanding who are the people in the system who might become targets or allies because of their formal roles? You are building a map of the public and perceived self-interest among the known power players and thinking about how to impact them. Why are the powers that be acting the way they are acting?
- **Power One on Ones:** Structured conversations with people identified in your system landscape to examine their triangle in regards to your issue. You do your homework, the system landscape and media survey before you talk to them and see where they stand in relationship to your possible defined issue(s).

Relationship Inventory: You figure out who you know and try/decide to make relationships with who you think you should know.

- **Base and Leadership:** Find out who your people know in regards to your defined issue(s), System Landscape, Goal Analysis and Media Study to see who they are in relationship with.
- **Media Relationship Survey:** You want to focus on the media figures that are doing the stories on your issue and see how they've written and covered your issue. Interview/ 1 on 1 people they've talked to in order to get a feel for the media. Also you want to see if you can find "receptive" reporters.
- **Power Relationship Survey:** Know how the "power players" and in the System Landscape and through your Power 1 on 1's know each other. Understand their relationships and connections with each other in relationship to your possible defined issue(s).

JWJ WORK BOOK APPENDIX

Organizing Money – Appendix

The following materials are from training materials of The AI Southern Region Guide to Raising Money and are modified slightly for this training process:
<http://www.amnesty-volunteer.org/usa/southRTG/Fundraising/TOC/index.html>

Sobering Facts about Fundraising:

Over the last two decades, the following percentages hold:

- In 2007, \$295 billion dollars was given to non-profit organizations from these four sources:

- Corporations/Foundations 16.6%
- Individuals 83.4%
- People with incomes of \$10,000 or less give 2.8% of their income to nonprofits.
- People with incomes between \$75,000 and \$100,000 give 1.7% of their income.
- People with higher incomes give a smaller percentage of their income to nonprofits.

Movements DO fund themselves (people in the movement pay for it!)

- The Labor movement of the 1930's, the modern civil rights movement of the 1960's, the welfare rights movement of the 1970's, etc., etc. All of these movements were vibrant masses of energy that changed countless lives for the better, and all of them received the majority of their money from their members. That means workers funded the labor movement, African-Americans in the South funded the civil rights movement, and welfare rights recipients funded their movement.

Ladder of Effectiveness:

PERSON KNOWN BY CONTACT SUCCESS RATE

Face-to-face personal solicitation 50%
Personal letter (with follow-up phone call) 40%
Personal letter (no phone call) 25%

IN-HOUSE/WARM LIST

Personalized form letter 10%
Telephone (written follow-up) 10%

STRANGER

Canvas (door-to-door) 10-15%
 Telephone (written follow-up) 5%
 Direct Mail 1-2%
 Special Event – depends on event and organizational relationships

AVERAGE LENGTH OF TIME TO RAISE MONEY

Short-Term Money - 3 Months

1. Individuals/major donors
2. Memberships
3. Simple special events
4. Volunteer canvassing
5. Direct mail
6. Neighborhood businesses

Mid-term Money - 3-6 Months

1. Local foundations
2. Local churches
3. Larger special events
4. Service clubs
5. Some national churches
6. Unions

Long-Term Money - 6-18 Months

1. National foundations
2. Financial institutions
3. Large corporations
4. Branch corporations
5. National churches
6. Jurisdictional canvass
7. Professional canvass
8. United Way
9. Business ventures
10. Service clubs

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Organizing Money – Appendix

What Do I Say? Tips for Successful Fundraising:

The best, easiest, most effective way to fundraise is to simply ask. That's right, asking is the best method. When you talk with people or organizations that have aligned values, you are helping them to invest in those values.

If you ask people to support your values by signing a letter or petition, you can ask them to complete the support by helping buy postage. Here are practical hints for making fundraising a routine and easier part of your group's work.

- **Ask for the Donation:** Don't wait for donors to take the initiative. If you want a donation, you must ask for it. Everyone you talk to about values that align with ours should be asked to join our organization. Anyone who signs a petition or letter should be asked to pay for the postage to mail it off.

- **Stress the Need:** Show that the work around making our values real - research, documentation, postage, etc. - is expensive. Figure out what it costs to run your organization or pay for an action and make those numbers available.

- **Every Donation is an Appeal for our values:** Let people know they are part of the solution. Make it clear that every cent is putting pressure on our targets to stop workers rights abuses. Every donation, no matter how small, helps fight injustice. Many people want to give to your values because they share those values with you. You are fulfilling a need. Contributing to organizations that support our values makes people feel good. Not everyone has the time to do everything they want, so by giving you money they feel they are doing something. If you don't ask, you don't give them the opportunity to give.

- **Integrate Fundraising into ALL Your Activities:** Fundraising is a numbers game. For every yes, there will be four no's. So don't sweat the no's, keep asking other people until you get to the yes. Use every fundraising event to generate appeals, create publicity or reach out to the community. Likewise, use every campaigning event to raise some funds.

- **Enjoy Yourself:** Although our values are serious, to be effective in your work you will have to have fun. If you don't, you will burn out. Before you burn out, you will serve our values effectively and perhaps, will do more harm than good to our cause. Have fun and the enthusiasm will help your appeals.

- **Be Persistent:** Keep asking for money. People who have supported your values on one occasion will realize that money is always needed. If a particular fundraising source or project was successful once, try it again. If a source wasn't successful on the first ask, don't give up. Circumstances could change so keep trying. If someone couldn't give a \$10 donation, ask for a \$5 one. You never know.

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Fundraising Plan Template:

Goal:

Source	2012 Actuals	2013 projected	2014 growth goals	Key work
Organizational Dues				
Individual Donations				
- sustainers - annual appeal - major donors - online				
Foundation grants				
Program-specific contributions				
from JWJ, unions, churches, etc				
Events				
- annual conference - annual dinner				
TOTAL		\$	\$	

Fundraising Calendar:

Quarter 1 goal:	January	February	March
Quarter 2 goal:	April	May	June
Quarter 3 goal:	July	August	September
Quarter 4 goal:	October	November	December

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Organizing Money – Appendix

How NOT to Ask For Money:

1. Not Asking. People have been heard to say, "If we do good work, the money will follow." Money doesn't have legs. You have to ask for it.
2. Beating around the bush. Because some people think asking for money violates good manners, they'll hint at it rather than asking directly. "We are so broke I just don't know how we're going to pay the bills. By the way, I just love your new car."
3. Dishonesty. Don't lie to get the money. It's much better in the long run to be truthful about what you're doing and what you need the money for. Don't say things just because you think that's what your prospective donor wants to hear.
4. Begging, apologizing or demanding. Donors give because they believe in what you're doing. So you have to believe too. You're asking them to support the work that your organization is doing, so you don't need to beg, you have nothing to apologize for, and demanding is inappropriate. Make sure you give first and can talk about why you gave to the cause.
5. Ignorance about your organization's financial picture. If you're asking for money, you better be able to explain how it's going to be spent, where else you're getting money from, etc.
6. Asking for too little. We tend to ask for less than we need because we don't believe anybody will give it to us. It's better to ask for what you need, as long as it's appropriate, than to ask for an amount that won't get the job done.
7. Making assumptions. Often we don't ask because we've decided ahead of time that the person we're thinking of won't want to give. Unless you have a very concrete reason for knowing that the person is not a good prospect, never assume or make decisions for someone else. If they can't give, they are perfectly capable of saying no on their own.
8. Giving up. Persistence is the key to successful fundraising. 50% of your asking will end up in no's. So you just have to keep asking and "get to yes."
9. Stopping at yes. Remember to go back to those who have said yes once. If they've said yes once, then you want them to consider supporting you again. Make them into loyal supporters. Don't forget to ask again.

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Organizing Money – Appendix

Preparing the Case

Asking for larger amounts of money from major donors or organizations requires a well-crafted “case.” The case describes the problem and the work that required funding to address the problem. It also clarifies the self-interest of the donor so that the donation is justified from their perspective. When you are ready to write a formal case statement, gather around you a few of those who best know the specific focus of the case (reason for asking for donations) you wish to write up. Ask their help, in a brainstorming type session, for the answers to the following questions.

1. The Problem. Describe in graphic, photographable detail the situation that leads your organization to address this specific problem or set of problems. NO abstract language allowed! It is good to use a specific story or two here; or, perhaps a quotation from someone directly affected by the problems. Human detail, individual stories help enliven the case and make it more interesting to prospective donors.
2. The Vision. Describe in equally visual and graphic images what the situation will look like, feel like, etc., when the problem is completely resolved and the reasons for your work are finished or drastically changed.
3. The Mission. Describe the 3-5 year goals that your organization has set itself to move closer to the day when the vision is a reality.
4. The Goals. Describe the specific things your organization intends to accomplish in the next twelve months toward the accomplishment of those long-term goals listed in the mission.
5. Evidence of Effectiveness. Give 4 or 5 compelling evidences of your organization's effectiveness. Stories and statistics can work well here as well as quotations from well-known credible people. Choose examples that will show that your organization is the right one to be tackling the problems above - that it has the experience, the will, the track record of success that says to a prospective donor, "This is the group to invest in if one wants to make changes in the problems just described."
6. The Need. Make as specific a list as you can of all the people skills, time, money and things your organization will need to accomplish your one-year goals. Put a price tag next to each item.
7. The Financing Plan. Describe in as much detail as you can how you will find the resources and money you need. How many individuals will you approach, how many foundations? Describe how and who will do the individual-focused fundraising. A prospective donor, whether an individual or a foundation, does not like to be the only one investing. They want to know they have or will have others as partners.

8. Specific Request to this Specific Prospective Donor. Exactly what is it that you want from this specific prospective donor, foundation or corporation? How much money is needed to fund exactly which part of the project you are asking them to support?

9. Benefits to the Prospective Donor. Get inside the head of the prospective donor and identify with his/her values and priorities. Use the lens that they use to look at the world. Then make a detailed and specific list of the benefits to this donor if he/she says yes to your request for a gift. Most benefits will be intangible and that's OK. But they must be identified and presented to the donor rather than leave it for them to figure out. This will encourage him/her to recognize their self-interest in saying yes.

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The Fun of Asking for Money in Twelve Easy Steps

I enjoy asking for charitable gifts because I am giving people an opportunity to be involved--if I don't ask them for money to help support a cause, how will they know the organization needs it or that I am involved and have supported it too?
Here are 12 ways to make "asking" a little easier.

1. People, by and large, are flattered that you have taken time out of your day to come and visit them. It honors their contribution of time and dollars to an organization. Your chances of getting the size gift that you desire are much better if you make face-to-face contact as opposed to a telephone call. Often, the hardest part of any solicitation is getting the appointment--but a person to person visit is always best.

2. Do your homework. Know the organization for which you are asking money and the case for the campaign. Know the prospective donor. Is there a donor giving history, an indication of an interest in the organization and the project and the capacity to give at a certain level?

3. I always make my own commitment to the campaign first. I find that once I have made my own commitment to a cause I believe in, it's not so difficult to ask others to do the same.

4. I prefer to go on a visit with another trustee or a staff member of the organization who can answer questions or talk about a facet of the project in which I am not as well versed. It allows one person to listen and watch body language while the other person talks. The two solicitors should be prepared to swap roles so that they can both take turns talking and listening.

5. I try not to plan a solicitation at a restaurant because usually just as you get ready to ask for the gift, the waiter brings your food and the moment is interrupted. I have usually asked people for money in their own houses or offices--places where they feel comfortable. Pictures, awards, or family memorabilia often provide an ice breaking opportunity before you launch into why you are there. Asking people for money gives me a chance to get to know them better, to learn about their families, their concerns and their history with a particular organization.

JWJ WORK BOOK APPENDIX

Organizing Money – Appendix

The Fun of Asking for Money in Twelve Easy Steps

6. Begin the conversation by putting the prospect in the driver's seat. I always ask my prospect how much they know about the project, what questions they have and if they are ready to consider a gift to this endeavor. If they are not, I try to help them better understand the project. I find out what else or whom else they need to see before they are ready to make a gift. Often, by listening to family circumstances, you can fashion the second visit to meet the circumstances and needs of the prospect, often providing a giving opportunity to fit the bill.
7. So often, when people go out to talk to a prospect, they don't decide among themselves who's going to make "the ask." Consequently, both are waiting for the other to do it and no one ever pops the question (Decide who on the visiting team will ask for the gift).
8. Once the explanation of the project is complete and the prospect has hinted at their interest in funding something in particular, it is time to ask them to consider a gift in the range or a substantive pledge over 3 years. It is important to get the number on the table, in whatever way is comfortable for you. Even if they say that they never expected you to ask for so much and they will have to think it over, they know what the expectations of the organization are and they can measure their own ideas accordingly.
9. I like to ask people to consider a gift, which might be a "stretch" gift for them. A "stretch" gift is something that is more than they thought they would be asked for but certainly within their range of affordability. Ask people to become sustaining members of your organization through giving on a regular basis by credit card, bank withdrawal, or withhold from a paycheck. This is an excellent way to sustain giving to your organization.
10. I try not to be afraid of objections. If there are no objections and the prospect grabs his check book, I know I've grossly underestimated his potential and asked for too little. It is usually very flattering to be asked for more than one will actually contribute and may raise the prospect's sights, as long as the request is in the right ballpark.
11. I try to have people sign a pledge card so that the organization has a written confirmation of the gift. It's easier to have the pledge card signed on the first visit than to send it in the mail or have to schedule another appointment to have it signed.
12. I am always sure to write a note right after my visit, to thank the person I saw for their time (and gift).

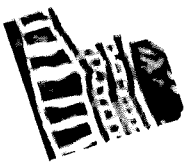
JWJ WORK BOOK APPENDIX

Glossary of Terms:

- **Agitation**
 - Helping someone gain clarity on their values.
 - **Allies**
 - People who share your self-interest, some of your values but possibly not your specific objectives.
 - **Ask/Demand**
 - What you want from a target that should have the characteristics of an issue.
 - **Athenian Values – Corporate Agenda**
 - Values that elevate money over people and seeks to divide us from each other, disempower communities, confuse our self-interest and compromise our values.
 - **Base**
 - A group of people that share values and self-interest, are in long-term, sustained relationships are willing to take direct action together, to create concrete change.
 - **Campaign**
 - How we build and exercise power to control, create and prevent change, by deploying our relationships and refining our self-interest to make our values felt in the real world.
 - **Cut**
 - An agitational phrase that creates a moral crisis in the listener and demands action.
 - **Issue**
 - A specific, winnable, significant solution to a problem that has a target.
 - **Leverage**
 - How we use power
 - **Life Tree**
 - A tool to examine your life and the lives of others. The leaves are your public relationships and traits you cannot hide. The trunk is the values we carry. The roots are the experiences that shape us that our values flow from.
 - **Meeting**
 - A meeting is the most basic point where our organizations reaffirm our relationships, reaffirm our interest, prepare for crisis and plan to take action.
 - **Melian Behavior**
 - Being out of relationship with others, afraid of power, not clear about one's self-interest, being powerless and without the ability to defend your values and lacking an understanding of the world the way it is.
 - **Narrative**
 - A story that society tells itself that serves the Athenian Values of the Corporate Agenda.
 - **One on One**
 - An intentional meeting where we attempt to uncover self-interest and values and build stronger public relationships.
 - **Power**
 - Organized people and organized money, the ability to control, create and prevent change.

Glossary of Terms:

- ☛ **Power Analysis**
 - The act of understanding the Values Triangle(s) of yourself and others as well as the socio-political landscape and system in relationship to your issue/demand.
 - **Problem**
 - A socio-economic situation that cannot be solved such as poverty, racism, war or terrorism.
 - **Relationships**
 - Accountable, reciprocal, transparent, long-term arrangements that advance social and economic justice and do not violate our values.
- ☛ **Self-Interest**
 - The primary motivator for why someone takes action or doesn't. It is what drives them that is deeper than their immediate wants and needs.
 - **Tactics**
 - Specific ways we use power that do not harm our values and build toward short, medium and long-term goals
 - **Target**
 - The person that can give you what you want.
 - **Values Triangle**
 - An organizing model with relationships at its base, that we agitate within, to make people clear on their self-interest, so that they can build and use power to make their values real.



Midwest Academy - GROW Strategy Chart

After choosing your issue, fill in this chart as a guide to developing a strategy. Be specific. List all the possibilities.

	Goals	Organizational Considerations	Constituents, Allies and Opponents	Targets	Tactics
Long Term:	Have:		Constituents:	Primary target(s):	Organizational/ Education:
Intermediate:	Want:		Allies:	Secondary target(s):	
Short Term:	Problems:		Opponents:		Power:

SUGGESTED READING

COMMUNITY ORGANIZING

THE JUNGLE by Upton Sinclair, The milieu in which community organizing emerged.

RULES FOR RADICALS by Saul D. Alinsky. A must read!

REVILITE FOR RADICALS by Saul D. Alinsky. If you can't find Rules for Radicals, then read this. One or the other is the clearest idea of what community organizing is all about

ORGANIZING FOR SOCIAL CHANGE: a Manual For Activists in The 1990's by Kim Bobo, Jackie Kendall and Steve Max. This can be obtained from the Midwest Academy in Chicago and is a practical guide to organizing.

UNION ORGANIZING

LABOR'S UNTOLD STORY by Richard O. Boyer and Herbert M. Morais. The story of how Labor has shaped our country. Out of print now but can be found in used book stores.

HAMMER AND HOE - ALABAMA COMMUNISTS DURING THE GREAT DEPRESSION by Robin Kelly. This chronicle of the challenges of organizing an interracial coalition of sharecroppers at the height of the Great Depression in the face of intense racism recovers an incredible piece of lost organizing history.

SOLIDARITY DIVIDED by Bill Fletcher Jr. and Fernando Gaspin. This book chronicles and analyzes the crisis in organized labor and a path toward social justice. It charts a new direction for labor by two of its leading activist intellectuals.

POWER AND ATHENIANS

THE ART OF WAR by Sun Tzu. The classic treatise on war and power.

THE PRINCE by Machiavelli is an insider's view on how the powerful use power to disorganize, manipulate and understand their opponents.

POWER POLITICS by Arundhati Roy tells story after story of the impact of power on the lives of ordinary people and the need for people to exercise their democratic rights to stop that power from destroying the environment, values and the very people of the earth.

THE SHOCK DOCTRINE by Naomi Kline, a cogent look at how naked power is exercised by those who place money over people and how we must resist them.

WOMEN WRITING RESISTANCE: Essays from Latin America and the Caribbean by Jennifer Browdy de Hernandez, a collection of articles written by women working for social change in the face of severe oppression and political terror in the Americas.

EXTENDING OUR ANALYSIS OF OPPRESSION: Bringing Classism More Fully Into The Race and Gender Picture. by Chuck Barone. Department of Economics, Dickinson College, Carlisle, PA.

THE FOUNDATIONS OF CLASS AND CLASSISM by Chuck Barone. Department of Economics, Dickinson College, Carlisle, PA.

CIVIL RIGHTS MOVEMENT

EYE ON THE PRIZE edited by Clayborne Carson. An excellent overview of the Civil Rights Movement that became an award winning PBS series.

PARTING THE WATERS, PILARS OF FIRE, and AT CANAAN'S EDGE by Taylor Branch. This is an excellent three volume work on the Civil Rights movement and Dr. King.

PULLMAN PORTERS AND THE RISE OF PROTEST POLITICS IN AMERICA, 1925-1945 by Beth Tompkins Bates. The story of the Pullman Porters' Organizing Drive in Chicago that set the stage for the modern Civil Rights Movement.

RACE MATTERS by Cornel West on one of America's greatest moral and spiritual challenges.

I'VE GOT THE LIGHT OF FREEDOM by Dr. Charles Payne. The fantastic story of Ella Baker, SNCC and the evolution of the Civil Rights Movement.

WOMEN'S MOVEMENT

NOT FOR OURSELVES ALONE by Geoffrey C. Ward and Ken Burns. A history of the women's suffrage movement, that was turned into a fantastic PBS series on the Women's Suffrage Movement.

THIS BRIDGE CALLED MY BACK - WRITINGS BY RADICAL WOMEN OF COLOR by Cherrie Moraga and Gloria Anzaldua. This collection of essays from feminists of color remains a cornerstone of consciousness raising, confrontation and transformation for people in struggle no matter their race or gender.

STONE BUTCH BLUES by Leslie Feinberg. The moving story of the struggle for identity, labor rights and human rights from the perspective an out, queer woman in the 70's and 80's.

EDUCATION and MEDIA

PEDAGOGY OF THE OPPRESSED by Paulo Friere.

THE CULTURE OF FEAR by Barry Glasner on why our media is exactly as it is.

DEMOCRACY

THE DECLARATION OF INDEPENDENCE, by Carl L. Becker. A Study of the history of political ideas.

HOPE DIES LAST by Studs Terkel, his last book on how ordinary people are faring in the country that they fought to create in the 60's and now see falling apart at the dawn of the 21st century.

A PEOPLE'S HISTORY OF THE UNITED STATES by Howard Zinn, a book that examines how ordinary people have defied and been affected by Athenian values and power.

DEMOCRACY MATTERS by Cornel West on what it will take for America to become America.

THE LAW OF PEOPLES by John Rawls on what it means to live in a just society.

THE BEST DEMOCRACY MONEY CAN BUY by Greg Palast is an analysis of how the powerful use that power everyday to do direct harm to democratic values everywhere.

RELIGION

MINDFUL POLITICS, by PhD. Melvin McLeod a collection of short writings on politics from a Buddhist, people over money perspective featuring Bell Hooks, Thich Nhat Hanh and the Dalai Lama.

CRAZY FOR GOD by Frank Schaefer, a book that discusses how religion is being used to undermine democracy and transform and control our society.

WHEN RELIGION IS AN ADDICTION by Dr. Robert Minor a deep look at what happens to individuals and societies that use religion to escape from reality instead of having it reflect its values.

GOVERNMENT & SOCIETY

WHAT WE'VE LOST, by Graydon Carter on the attack on our basic freedoms by a very effective Athenian movement.

REPUBLICAN GOMORRAH by Max Blumenthal, a hard look at how our government has become intertwined with and possibly a captive of powerful interest groups.

WHAT'S THE MATTER WITH KANSAS by Thomas Frank, an examination how Athenian values, when applied to a society can tear it apart and keep it divided with the support of the very people who are suffering the most under its yoke.

CONSERVATIVES WITHOUT A CONSCIENCE by John W. Dean a tome that delves into the self-interest of and psychology of a deeply Athenian world view.

RIGHT-WING POPULISM IN AMERICA: TOO CLOSE FOR COMFORT by Chip Berlet. A powerful historical examination of right-wing movements in America and how our neighbors can both be reached and wander away from truly human values.

JWI Triangle and Corporate Agenda Handout-Amazon

BACKGROUND

The Company

- Amazon is the second largest private employer in the United States with over 1.5 million employees domestically. They have experienced massive growth in number of workers and in revenue (most recently at \$470 billion in 2021). The Chair of the Board is former CEO and founder Jeff Bezos, while the CEO was the previous head of their cloud computing division, Andy Jassy. They are headquartered in Seattle with an "HQ2" in development in Arlington, VA and numerous offices around the country.
- Jeff Bezos remains the largest single shareholder.
- They are the largest apparel retailer in the country, and make up nearly half of all online sales.
- They are multi-sectoral, with presences in retail, cloud computing, grocery (Whole Foods), prescription drug delivery, robotics and consumer electronics, and entertainment.
- Amazon operates over 1200 currently constructed logistics facilities in the US. They also operate in 25 other countries, though nearly 2/3s of revenue comes from the US.
- Jeff Bezos also personally owns the Washington Post, Blue Origin. His parents Jackie and Mike Bezos run the Bezos Family Foundation.

The Workers

- Because Amazon covers both tech and logistics workers, pay ranges from an average of \$18/hr in the warehouses to over \$120,000 salaried with their white collar workforce.
- Amazon is virulently anti-union, going back to busting an organizing drive of their call center in the early 2000s to today attempting to bust union efforts from NY to Alabama to California.
- That said, the independent Amazon Labor Union has succeeded at one Fulfillment Center in Staten Island, NY and is organizing in Albany and Southern California. RWDSU has been organizing in Bessemer, Alabama. Other various outfits from the Teamsters to the Machinists have attempted to organize the warehouse side over the years. Additionally, contracted pilots with Prime Air are with the Teamsters, while their entertainment division is largely unionized with the existing media unions like IATSE and the Teamsters.
- By Amazon's own metrics, their white collar staff are overwhelmingly white and Asian as well as majority male, while blue collar staff are majority Black and Latino and are half-and-half men and women. Managers are overwhelmingly white and male regardless of place in the company.

Impact on Communities

- Concentrated in retail, Amazon on average has eliminated 2 jobs for everyone 1 created.
- Amazon has received at least \$4.7 billion in subsidies from governments over the past decade in the US.
- Amazon has major contracts with the US and local governments with a particular focus on defense and policing. Their cloud computing serves as the backbone for ICE and their doorbell company Ring has hundreds of agreements to share footage with police around the country, with customers agreeing to the warrantless surveillance when they purchase the device.
- Amazon's expansion has come with increased lobbying, now nearing \$20 million/year.

- Amazon's warehouses and air hubs are also major contributors to pollution where they are based, which is near every city in the country and many suburban and rural areas as well.
- Amazon's monopoly practices also means there is less consumer choice and higher prices, which Amazon controls through aggressive expansion and in controlling their own third party Marketplace to prioritize their own goods over others.

JWI Triangle & the Corporate Agenda Handout-Amazon

INSTRUCTIONS

- 1) Construct the corporate triangle for Amazon.
- 2) Identify two tactics that JWI's triangle can use to disrupt the Amazon triangle
- 3) Identify two tactics that will allow Amazon to disrupt our triangle

Each group will get one sheet of paper to record your answers on.

You have 20 minutes. If it is not on the paper it did not happen.

Peace & Justice Coalition:

Your organization:

Your base is about 2,000 activists who are mostly either students (college or graduate school) or much older political activists in their retirement years. They pay \$30 a year in dues and are effective canvassers. They can deliver strong turnout at events, and think of activism in terms of taking direct action. They are deeply anti-corporate and pro-progressive-taxation.

Your work:

Your members are always looking to create media events through creative direct action, including street theatre, risking (or taking) arrests, disrupting black-tie fundraisers, and bird-dogging politicians. They name-and-shame developers and businesses who get tax breaks and the politicians who give them, and put in long volunteer hours to knock on doors and engage ordinary people whose elected officials are ignoring them. You've been involved in campaigns for progressive taxation, stopping the expansion of a business park (that would have destroyed the working-class neighborhood next to it), and ending tax breaks for real estate developers. You're rarely the lead organization on campaigns, but few groups can match your members' combination of shoe leather and gunpowder.

Budget and funding needs:

Your members' dues add up to about \$60,000 a year. After paying your sole staffperson (a twenty-four year old former member leader who works for peanuts) and some essentials like an accountant to do your taxes (your staffer does not know how to file a 990), there's nothing left over for most of your programmatic work. Your members are used to making big moves on small budgets, and you've got ambitious goals:

\$15k for staff. You've rarely held on to a staffperson for more than three years, and it's time for a raise and better health insurance
\$5k for media: Mostly contacting someone to get good photos and videos of your actions for use in social media and campaign materials
\$10k for canvassing materials
\$15k for direct action, from supplies to legal costs to food to bus rentals
Total organized money goal: \$45k

Funder relationships:

Neutral relationships with Community Foundation, Council of Churches, and Central Labor Council.
No relationship with State Policy Institute or Chamber of Commerce

