UNITING OUR MEMBERS AND THE NATION
Empowering leaders, educating students, strengthening communities

Theory of Change
Creating a Culture of Member Engagement of Political Advocacy & Activism!

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NEA Leadership Competency – ADVOCACY

• NEA Leadership Competency progression level(s).
  Level 1: Foundational and Level & 2: Mobilizing & Power Building

• NEA Leadership Competency themes:
  – Leverages advocacy practice
  – Acts as a political advocate
NEA Strategic Goal and NEA Organizational Priority

• NEA Strategic Goal
  – Strategic Goal 1: Strong Affiliates for Educator Voice and Empowerment

• NEA Organizational Priority
  – Early Career Educators
  – My School, My Voice
Theory of Change in Member Engagement in Voicing a Message

OBJECTIVE STATEMENT

To work through theory and practice of Theory of Change. To leave with a basic understanding of launching and executing organizing, policy, and political campaigns. Emphasis on creating a culture of member engagement and activism!
Theory of Change (ToC) is a specific type of methodology for planning, participation, and evaluation that is used in education, in the philanthropy, not-for-profit and government sectors to promote social change. Theory of Change defines long-term goals and then maps backward to identify necessary preconditions. \textit{(Stanford Social Innovation Review. Spring 2010)}

**BIG THREE FOR TOC**

- Plausible – Is your theory logical?
- Feasible – Can it actually be executed?
- Testable – Can you conduct an unbiased assessment of your theory?
Conventional Wisdom

What do you Advocate for?

What is an Activist?

Why do you volunteer?
Respect! Empower! Include! It is a Culture, not a slogan! “The Ask”

Prompt: Create an activist talking point/statement that speaks to you and that you can commit to as political advocate.

- Connect with Issues, Interests and Values.

- Match responsibility to Capacity, Commitment, Language, and Cultural Relevance.
Elements of an Organizing Activist Program

- The Plan
- The Ask
- The Training
- The Growth
- The Culture
Embrace Organizing!

Small Group Discussion

Culture  Language  Students

Teachers  Parents  Educators

Interest  Web  Assist

Community  Team  Helping

Volunteer  Teamwork 门-to-door

Cultivate  Members  Vote

Vote  Leaders  Issues

Elections  Grassroots  Campaigns

Leadership  Commitment  Weekends

Organizing  Door-to-door  Training

Leaders  Canvassing  Candidate

Educators  Teamwork  Programs

Assist  Calls  Coaching
Theories of Change may start with a program but are best when starting with a goal before deciding what programmatic approaches are needed.

Change Model Key Terms: Critical Thinking, Pathway of Change Explanatory

Process

- Recognized they need to change
- Decided on a plan
- Picked a small project to start with
- Applied success to bigger project
- Tracked progress to goal and adjusted as needed
- Gave staff access to data and data tools
- Laser Focus
- Scaled staff and technology
- Built program for post program success

Managing Complex Change
Managing Complex Change

- VISION
- SKILLS
- INCENTIVES
- RESOURCES
- ACTION PLAN

- CHANGE
- CONFUSION
- ANXIETY
- GRADUAL CHANGE
- FRUSTRATION
- FALSE START
Managing Complex Change with Efficiency!

Activist Plan

How to prepare

- The purpose for activists (community, educators/ESP’s, volunteers, families).

- The tasks and roles for which they will be responsible.

- How they will be managed?

- How they will be recruited?
Activists Recruitment Scenario

BACKGROUND

Your state association is relatively new to grassroots political organizing, but wants to capitalize on this fall’s elections to engage diverse candidates.

The turnout for this activity is new for some members who have not participated in an activity of this type before.

OPPORTUNITY: To turnout at least 10 - 15 volunteers make candidate phone calls next week.
Activity: Activists Recruitment Scenario

WHY? Engage diverse candidates /elected officials on education issues.

WHAT? Volunteers will turnout for a candidate phone bank using an education story/message.

Small Groups

The Plan: a) Discuss how you will motivate and/or assist volunteer activists to commit to making phone calls.

[10 minutes] b) List strategies, logistics, messages, materials, etc.

Recruitment: You have 10 minutes to recruit.

Phone Bank: Begin; recruiters will see how many volunteer activists show up.
Activity: Table Talk . . .

- Brainstorm issues your local/Council is currently focusing on.
- Write issues on post-it notes
Activity: Table Talk . . .

Table Group

1. Select a specific issue to work on at your table group
2. Re-write the issue on a large post-it.
3. Place the issue in the middle of chart paper.
Activity: Table Talk . . . Square It Off . . .

Table Group
1. Review the ‘brainstorm’ post its.
2. Identify common themes; group accordingly.
3. Prioritize issues/common themes.
4. Organize issues/themes around main issue.
Activity: Table Talk . . . Square It Off . . .
Plan It Out . . .

Table Group

1. Develop a work plan
The Training
How to bring diverse member activists onboard!

- Orientation to the campaign/organization.
- Training on the specific skills, (i.e. language/culture/family/zip code) systems they’ll be using.
- Mentoring and feedback on volunteer work.
Retaining Member Activists/Volunteers

- Be organized!
- Explain the purpose of the task.
- Provide training.
- Be inclusive.
- Share inside information.
- Show results

- Have fun!
The Culture! The Language!

- Be inclusive and welcoming.
- Cultivate & nurture a grassroots community inclusive of all zip codes.
- Give specific and purposeful heartfelt thanks.
- Articulate the impact of their work social justice cause, civic commitment, etc.
- Take feedback seriously.
- Exude joy, playfulness, and passion.
The Growth
How to develop diverse activist leaders.

Skills Training/Coaching
Leadership Development
Organizing Efforts
Commitment
Capacity
Session Outcomes

The content from this session can be used in the following ways in your current position/role:

• Communicate externally and internally to mobilize and engage members in elections, and on political activism and advocacy for issues and candidates
• As a basic framework for most activism and advocacy interactions
• Continue to utilize a cadre of key activist to forward local and state priorities
Closing

• Please complete the evaluation for this breakout session by using the **NEA Summit Mobile APP**! – *Please remember to build in 5 minutes at the end of your session to allow time for the attendees to complete the evaluation for your session.*

• Please visit the Leadership Development Resources website at [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment)