C4O
CENTER FOR
ORGANIZING

*NEA*
*RETIRED*

# Retired Member

# Organizing Toolkit

M.O.R.E. = Mobilize, Organize, Recruit & Engage

C4O Program:
Arizona & Florida M.O.R.E.
celebrate with
Todd Crenshaw, NEA Organizer.

Retirees 4 Public Ed

NEA M.O.R.E. programs welcome NEA
members who retire from other states, and live
& vote in either Florida or Arizona.

NEA Retirement Security Resources

nea
NATIONAL
EDUCATION
ASSOCIATION
nea.org

This NEA Retired member Organizing Toolkit consumed a huge amount of work, research and dedication. Still, implementation would not have been possible if we did not rely on other talented and impressive organizations. Therefore NEA would like to extend our sincere gratitude to LaborNotes, the Midwest Academy and the Wisconsin Education Association Council. Their materials greatly enhance this toolkit.

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Additional organizing resources can be found at: **www.nea.org/retired**

# Introduction

## What Is Organizing?

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

In 2002, Marshall Ganz's article in Social Policy, titled *What is Organizing?* described organizing this way:

*Organizers identify, recruit and develop leadership, build community around leadership, and build power out of community. Organizers challenge people to act on behalf of shared values and interests. They develop the relationships, understanding, and action that enable people to gain new understanding of their interests, new resources, and new capacity to use these resources on behalf of their interests. Organizers work through "dialogues" in relationships, interpretation, and action carried out as campaigns.*
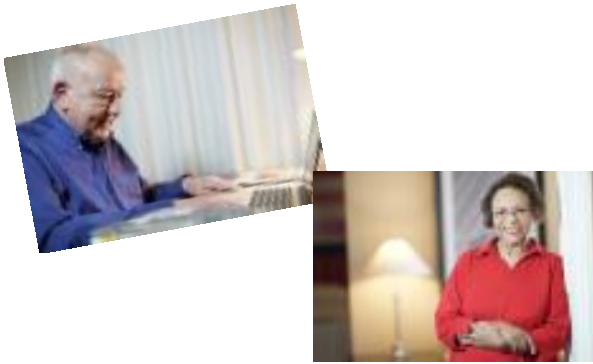
## Self-Interest – A Building Block for Organizing

One-on-one conversations are a critical organizing tool for understanding self-interest and in building relationships in order to mobilize people into action.

Everybody cares about something; figuring out what that something is takes understanding the person's self-interest. Organizing is finding out what someone's self-interest is and what they care about. Nobody is apathetic about issues such as school safety, student learning conditions, dignity and respect in the workplace, professional development, or their paycheck.

Apathy is often mistaken for feeling powerless and the inability to effect change. As organizers, we must tap into the issues people care about and offer inspiration and collectively develop viable solutions to address those issues. We can't make assumptions about what is in someone's self-interest; we must hear it articulated by an individual. Relationships are the foundation of organizing. If you have a relationship with someone based on trust, not only will they share what they care about—their self-interest—you can mobilize them into action.

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

Ultimately, we seek to build power to make change. In this toolkit, we will cover the critical elements of organizing:

- One-on-One Conversations
- Issue Identification
- Mapping the Workplace
- Bargaining—Issue Campaign
- Campaign Planning
- Building Power
- Organizing for Community Support

Organizing principles are the same whether you are trying to invite potential members to join your Association, identify and develop local leaders, rally members to support demands (whether residing in a state with a bargaining statute or a state without a bargaining statute), enlist community help for an issue of concern, or drum up support for a political candidate or platform.

The strategies and tactics provided here will assist Affiliates and Locals to successfully achieve campaign goals.

# One-on-One Conversations

## One-on-One Conversation Tools

- The Relational Meeting: Purpose and Process of the Organizing Conversation
- An Organizing Conversation
- Conducting a One-on-One Conversation: Key Components
- Practice the Organizing Conversation
- Write Your Own Organizing Conversation
- Worksite One-on-One Conversation Reporting Form
- General One-on-One Conversation Reporting Form
- How to be a Good Listener
- Anger, Hope, Urgency, You (AHUY)

All organizing is based on building relationships and finding common ground. Personal relationships are the foundation for mobilizing members into collective action. We cannot mobilize people effectively if we don't know what matters to them and what motivates them.

Through face-to-face, in-depth conversations, organizers can build the trust of the people they are contacting and make sure their questions are fully answered. That trust and understanding, developed through personal contacts, will be necessary to maintain support for whatever kind of campaign the Association is engaged in. This is also known as relational organizing.

Whether you are in a small or large workplace, conducting one-on-one conversations can feel very overwhelming. It is important to begin your conversations with colleagues who are respected by their peers and administrators. From that group, start with those you know and trust and expand your reach from there.

## Goals of One-on-One Conversation

- Assess where people stand, how they feel
- Find peoples' passion
- Identify potential leaders and activists
- Develop relationships
- Identify and validate self-interests
  - > personal goals
  - > professional ambitions
  - > values
- Identify what motivates or inhibits
- Agitate—Why are things the way they are and how can things be different?
- Inoculate
- Identify social and community connections
- Get commitment
- Set a follow-up plan
  - > Build solidarity/power
  - > Collect and analyze data

*A good teacher is like a*

*it consumes itself to light the way for others.*
*Thank you retired educators for your many years of service*

## Listening

Asking questions and active listening during a one-on-one conversation can identify common ground—issues, interests, values—that can lead to collective action. Listen for:

**Issues:** The topics, problems, concerns and public policy that people care about.

**Interests:** A person's stake in an issue.

**Values:** The moral principles people live by.

**Capacity:** What an individual can contribute to an issue or group, e.g., money, time, special skills, networks.

**Commitment:** What an individual is actually willing to do. A person's commitment is directly related to the depth of his/her interest.



### Active Listening

There are times when we all should listen rather than talk; however, this is often easier said than done. Research shows that we listen to people at a rate of 125–250 words per minute, but think at 1,000–3,000 words per minute. And once finished talking, we can only recall about 50% of what was said. We need to take note and better learn that there are times when being silent is powerful...and then there are times when we really do need to stop the conversation to speak up and ask those important questions before the topic becomes a runaway train.

It might be easier to discern the difference between when to talk and when to listen if you apply the 80/20 rule. Spend 80% of your time listening and only 20% of your time actually talking.

Plus, when you listen, you can repeat some of the words back to the other party and they will be astounded because you "get it" and listened with authenticity to hear and UNDERSTAND.

## An Organizing Conversation

Here are some guidelines for a fruitful conversation (or a series of conversations) with a co-worker.

Nobody should follow a script mechanically, of course. Talk with people like human beings! But think of this outline as a tool. The steps can help you move toward a goal, so people aren't left feeling like their time's been wasted with a spiel or a gripe session. Done right, an organizing conversation leads to action.

Your job is mostly to ask questions. You want people to realize:

- He/she cares about a problem.
- There's a decision-maker who has the power to fix this problem.
- The decision-maker won't fix it until someone pushes them to.
- If people really want this problem fixed, he/she has to join you and other co-workers in taking action.

But just telling them all this wouldn't be very effective. Instead, you want to ask the right questions that prompt the individual to bring it up on their own. To ask the right questions, you need to choose an issue by understanding the difference between an issue and a problem. As the Midwest Academy puts it, "A problem is a broad area of concern. An issue is a solution or partial solution to the problem." You don't organize people around homelessness; you organize them around a bill to allocate more funding for affordable housing programs, or around creating a coalition of churches willing to provide shelter to those who need a place to stay.

Most likely, if you are concerned with large, complex problems like homelessness or hunger, you will not be able to pick one issue that will solve the problem completely; you will need to target one specific facet of the problem. How do you choose that issue? The Midwest Academy suggests many criteria for this process, as follows.

# Issue Identification

It's important to organize around issues, not problems.

## Criteria for Deciding on an Issue

1. **Result in a real improvement in the lives of students, school staff, and community members**

   If you can see and feel the improvement (if it is measurable), then you can be sure that it has actually been won. The group must seek a broad consensus on what an improvement really is and state it clearly as a goal.

2. **Give people a sense of their own strength.**

   People should come away from the plan feeling and knowing that their efforts caused the project to succeed. This builds the confidence to take on larger issues.

3. **Alter the relationships of power.**

   Building a strong coalition creates a center of power and communication that leads to changes in the way the decision-makers make decisions.

4. **Be worthwhile.**

   People should feel that they are working for something about which they care, and which merits the effort.

5. **Be winnable.**

   From the beginning, people will have to be able to see that there is a good strategy for winning on an issue. Don't choose an issue that is so huge and abstract that the end result is unimaginable. Those involved should be able to see, from the beginning, that there is a good chance of succeeding in their efforts.

   To facilitate development of a good strategy, try to get advice from those with experience:

   - Find out who has won on the issue and talk with them.

To develop a winnable project plan, consideration must be given to costs to your group:

- How much money will your plan cost?
- How much time and effort will your plan require?

Consideration must also be given to the cost of any opposition to your issue:

- How much money will your plan cost those who might oppose it?
- How much money are they likely to spend to defeat your plan?
- What do they value that will make them want to hold out against your plan?



6. **Be widely and deeply felt.**
   Many people must feel that the issue is real and agree with the solution. No matter the staff position, everyone must feel strongly enough about the issue to do something about it.

7. **Be easy to understand.**
   It is preferable to not have to convince people that the issue exists, that the solution is good, and that it is important for them to help solve it. Sometimes this is necessary, though, particularly with issues that involve school finance.

8. **Identify the decision-maker.**
   The decision-maker is the person who can give you what you want. A more complex project plan may focus on several decision-makers. During planning, if the group can't decide who the decision-maker is, it will be necessary to reexamine the viability of the issue or define the goals more clearly.

9. **Have a timeline that works for your group.**
   Your group should establish a timeline that defines the approximate dates for the beginning,

middle, and end of your project plan. It will be important to put your goals and accompanying tactics in the timeline.

10. **Do not be divisive.**

   Avoid issues that divide your group. Survey your group to find an issue that will be supported. Will this issue help or hinder in reaching new people?



11. **Build leadership.**

   The plan should have many roles and tasks inviting the involvement of a multitude of ESPs, whether food services, custodial and maintenance services, security services, etc. Consider the skills people will develop and the contacts the group will make for future work together.

   In a plan that involves working with a coalition, building leadership has a different meaning since the coalition partners are already leaders. Coalition leaders may need to learn to work with each other and to merge several plans together.

12. **Be consistent with your values and vision.**

   Values should be consistent with the group's values and vision in support of public education and public education employees.

13. **Set your organization up for the next fight.**

   You need to build capacity through leadership development, capacity building, messaging, actions, activist identification, etc., which will give you a jump-start when you are ready to go for the next campaign.





## Let's Begin Organizing...The Critical Conversation

1. **Discover the issues**

   Begin by asking questions—and listening to the answers—to learn what your co-worker cares about. Make your questions open-ended, especially when you're getting to know someone.

   > How's your day going?

   > How did you get this job?

   > What do you like about working here?

   When you're organizing around a particular issue, your questions might get more pointed. Still, even if you have a petition about the awful new schedule, don't leap straight into "Will you sign this?" Instead, ask:

   > I hear you're now working a morning and afternoon shift schedule–how does that work for you?

   The point is for your co-worker to remind himself or herself how they feel about this problem, before you ask them to act. If you've discussed this issue before, you can still ask how it's affecting them today, or share someone else's story and get their reaction.

2. **Agitate**

   React to what he or she tells you, and ask follow-up questions. By reacting, the organizer can help the other person feel they have permission to be angry:

   > Wow. How long has that been going on?

   > How does that make you feel?

   > Is that okay with you?

   > How are you coping?

   > How is that affecting your family?

### 3. Lay the blame

Get them talking about who's responsible.

> Why do you think we're having this problem?

> Who's in a position to fix it? What would they have to do?

> Do you think this problem is going to correct itself?

Many times we feel our problems are just "the way things are." Realizing that bad conditions didn't fall from the sky can be empowering. If someone made the decision that caused this mess, that someone could also unmake it.



### 4. Make a plan to win

Now that your co-worker is angry, it's time to offer some hope. Hope comes from your power in numbers and a winnable plan. That's how you make your problem into a problem for the decision-maker.

> Most people want to go back to the old bell schedule. The administrator hasn't listened, but what if 25 of us sign this petition, and we all march into his office together to deliver it?

> What do you think he'll do? Will he be able to keep ignoring us?

> What's his supervisor going to say?

This step will be trickier if today's petition doesn't address a problem that this person feels strongly about. You'll have an easier time organizing if you choose issues that are widely and deeply felt.

But what you can say is that power in numbers is our only way to get a say on any issue. For instance:

> If we win on this issue, do you think the administration will learn something? Will taking action on the next issue be easier?

> This is the first step. We've all got to start backing each other up. How else are we going to build enough power to fix the understaffing you're talking about?



### 5. Get a commitment

Ask the member to be part of the solution by taking a specific action.

> Will you sign this petition and come with us to deliver it on Thursday?

If someone is fearful, acknowledge that their fears have real reasons behind them. But still, things won't get better unless they get involved. Your job isn't to convince them that their fears are unfounded, but that they need to act anyway.

> How is the schedule ever going to get fixed if we don't take action? Are you willing to let this problem go on?

Helping the member through it will be a lot easier when you're inviting them to act on what they've already said—not pushing an action you're trying to "sell."

### 6. Inoculate and re-commit

Now your co-worker is committed—but does he/she know what they're getting into? Ask how they think management will react to the action.

> What do you think the administrator will say when we go to his office?

If there's a likely risk he/she hasn't thought of, warn them about it.

> What if he gets angry and threatens to write everyone up? What if he offers to meet with one or two of us but not the whole group?

Talk through the possible outcomes. Then ask whether you can still count on their participation.

> Does any of that change your mind?

This part might sound like you're undermining your organizing. You've gone to all this trouble to help your co-worker decide to act, and now you're trying to talk them out of it? But like inoculating against a virus, the idea is to help them develop an immunity to the administrator's attacks—by giving them a small dose before they're exposed to the real thing.

This way, when the administration reacts, he or she won't be thrown by it. In fact, your correct prediction will boost your credibility.



**7. Set a follow-up plan**

As organizers, we need to be continually cognizant that follow-up is the key to organizing. Without timely and continual follow-up, much of your hard work will be for naught.

Agree on the next step, and when you'll check back in. Maybe they're going to meet you on Thursday to deliver the petition, or they'll ask two co-workers to sign. Or maybe you simply promise to report back on Friday about how the meeting went.

Remember, you're not just trying to pull off this one action. You're also trying to draw people gradually closer to the center and build an ongoing network of communication. You're trying to make standing up, in an organized way, a normal and natural part of workplace life.

> Can you ask Jane to sign? Great! I'll come back at the end of the day to find out how it went, okay?

## Assessment of One-on-One Conversations

Assessment is a word that describes the act of organizers engaging people in one-on-one conversations to determine as best as possible their degree of support for the union, based on the directly observable verbal, visual, and behavioral indications uncovered in the conversation. Assessments are conducted several times during the life of an organizing campaign and for various strategic purposes. Although the underlying reason for assessments is to measure the level of union support at any given point in time, assessments also are used to:

- Track movement of support.
- Continually assess leadership potential and development.
- Guide allocation of time and resources in a campaign.
- Provide a road map of who needs the highest priority of a personal organizer's attention in a campaign.
- Measure committee effectiveness.
- Uncover issues.
- Gain feedback on effectiveness of tactics and issues.
- Assess outcome of worker "tests" throughout the campaign.
- Test effectiveness of the employer campaign.

Conducting assessments is a fundamental skill that organizers must learn and constantly practice. Conducting assessments effectively calls upon an organizer's skills in communication and observation, especially listening skills. Assessments must be as precise as possible, directly observable, and measurable.

## Assessment Dos and Don'ts

**DO** always base assessments on directly observed verbal, visual, and (most important) behavioral indications of the person's degree of support for the union, such as volunteered statements or more preferably observable actions in support of the union.

**DO NOT** base assessments on supposition, hearsay, rumor, or a previous assessment.

**DO** begin assessment conversations with open-ended probing questions that allow you to uncover indications on which to base your assessment.

**DO NOT** rely entirely on closed-ended "yes" or "no" questions, or direct questions on the person's degree of Union support that will easily allow the person to provide the answer he or she thinks you want to hear or need to hear so you will just go away. If you do ask

direct questions, make sure you collect other evidence to support or refute the answers you hear.

**DO** use active listening skills.

**DO NOT** be so focused on how you will respond to what you hear that you miss important indications provided to you in the conversation that will help you with your assessment or that will provide clues on how to probe more deeply for those indications.

**DO** watch for non-verbal indications in addition to what is being said in the assessment conversation.

**DO NOT** ignore facial expression and body language. They are important elements of the conversation.

**DO** treat the assessment conversation like any other organizing conversation.

**DO NOT** communicate overtly that the purpose of the conversation is to make an assessment.

**DO** make mental notes of how you will assess the person, how you will justify that assessment based on what you observed, and any issues or problems uncovered in the conversation.

**DO NOT** make written notes during the conversation and **DO NOT** complete any paperwork associated with the assessment in front of the person.

**DO NOT** be fooled by the "friendly 4," the person who is nice to you but does not provide any evidence of having the characteristics of someone who should be assessed as a "1", "2", or "3."

**DO NOT** confuse assessing worker support for the union with assessing personality. There are people whom you do not personally admire who are "1s." Conversely, the nicest person you know may never support the union.

**DO** end the assessment conversation in as positive a manner as possible, keeping the door open for future contact.



| Code | Assessment Definition |
|------|----------------------|
| 1 | Leader: member or potential member who will do anything for the campaign's success |
| 2 | Supporter: member or potential member who supports the organizing campaign |
| 3 | Member or potential member on the fence, needs follow-up |
| 4 | Opposes union and will never support the campaign |
| 0 | Member or potential member not yet assessed |

# Mapping the Workplace



## Mapping Tools

- Draw Your Own Workplace Map
- Make a Chart of Your Workplace
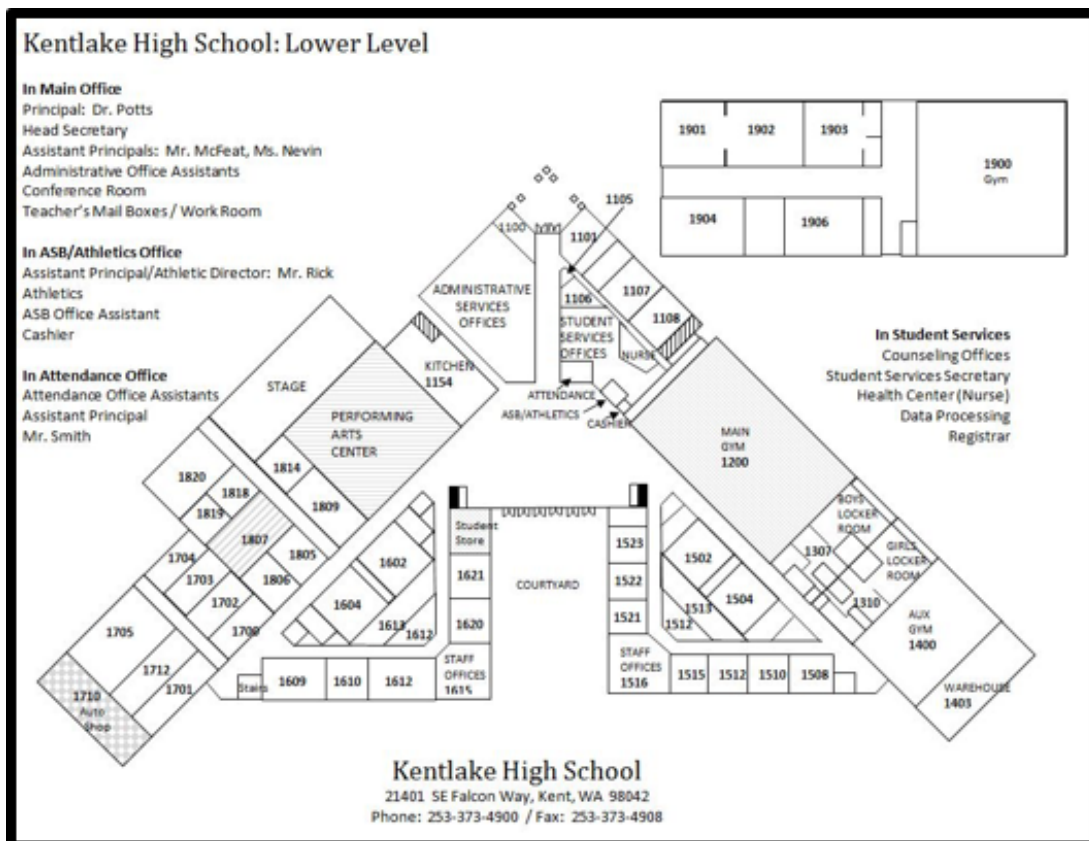- Map How People Connect
- Analyze Your Workplace Map

Mapping is a physical depiction of the worksite that illustrates presence and physical proximity of staff by such factors as membership or activist status, age/seniority, job title, assessment status, social relationships, etc.

Once created, a map gives us a look at selected data from a bird's eye view and provides a starting point for a strategic discussion of organizing.

- Map out where ESP members/potential members are, supervisors/administrators, bus drivers, maintenance and cafeteria workers, etc.

- Find the worksite's "Hot Spots" and "Dead Zones."
- Find where conversations and action happens— do people congregate at the bus barn in the mornings? Do ESPs have a favorite "coffee" break location?
- Check your map against your worksite rosters.



**Kentlake High School: Lower Level**

**In Main Office**
Principal: Dr. Potts
Head Secretary
Assistant Principals: Mr. McFeat, Ms. Nevin
Administrative Office Assistants
Conference Room
Teacher's Mail Boxes / Work Room

**In ASB/Athletics Office**
Assistant Principal/Athletic Director: Mr. Rick
Athletics
ASB Office Assistant
Cashier

**In Attendance Office**
Attendance Office Assistants
Assistant Principal
Mr. Smith

**In Student Services**
Counseling Offices
Student Services Secretary
Health Center (Nurse)
Data Processing
Registrar

**Kentlake High School**
21401 SE Falcon Way, Kent, WA 98042
Phone: 253-373-4900 / Fax: 253-373-4908

## Map out how people connect

**Mark the groups.**
Draw a circle around the people who form each work group and each social group. If members of a group are scattered all over, indicate them some other way, such as with a certain color or symbol.

> Who goes to the same place of worship?

> Who socializes together?

> Who works together?

> Who are all the smokers?

> Who carpools together?

> Who are the Spanish- speakers?

As you identify groups, discuss them.

> How does this group relate to the administration?

> What are the biggest problems affecting this group?

Keep your observations respectful and factual, not "gossipy." The idea is to find insights that will help you organize with these co-workers, not repeat stereotypes or gripes about them.

**Mark the leaders.** Indicate each group's leader with an appropriate color.

> Who's the main leader in this group?

> Who do you go to with problems?

**Map out union support.** Who is part of your organizing team so far? If there's not a formal group, choose some criteria.

> Who gathered signatures on the latest petition?

> Who's helping to map the workplace?

Also mark the wider circle of Union supporters.

> Who signed the last petition?

> Who is a member/ potential member?

## Leader Identification

Fundamentally, a leader is someone who has followers. That means there are others who will take an action—sign the petition, wear the sticker, attend the rally—when this person asks. When conducting a one-on-one conversation and mapping the workplace, it is critical that we keep an eye out for natural leaders.

**Leaders are people who:**



- **Have a following.** Leaders know other people in the community or in their building or district who share their concerns. Leaders identify other people who can be engaged in the Association/campaign and welcome new people readily.

- **Deliver.** If a leader promises to do something, he or she does it.

- **Are accountable.** Others in the organization or community care about what a leader is saying or doing on their behalf. Leaders check in with the people they represent.

- **Listen.** Leaders have their ear to the ground and take the time to ask other people what they need and what they think.

- **Motivate others.** Leaders bring out the best in other people.

- **Get respect and give respect.** Other people listen to leaders and view them as trusted colleagues.

- **Rise to the occasion.** In a crisis, others can count on leaders to respond.

- **Turn anger into action.** Leaders are comfortable expressing their dissatisfaction with oppressive people and institutions and are ready to direct their anger toward doing something productive.

- **Are hopeful.** Leaders believe that change is possible and that they have a role in creating their own future.

- **Understand self-interest.** Leaders know what is important to them and what they hope to achieve from building the organization. Leaders believe that working with others is how to get what they want.

- **Want to build collective power.** Leaders know that building collective power is the way to create long-term solutions to building level, district level, and community social problems.
- **Have a sense of humor.** Leaders understand that humor sustains communities and individuals, and prevents bitterness and burnout. They may not be comedians or great joke-tellers, but they are able to find the humor in both the good and not-so-good aspects of everyday life.
- **Are natural role models.** Not all leaders have titles or hold elected offices, but they have a following amongst their peers.

**A leader is not necessarily:**

- The loudest person in the group.
- The person who speaks the most.
- The person with the most money or education.
- The person who is most interested in politics.



# Building the Organizing Committee

(Association/Building Representatives, Member Engagement Teams, Action Teams)

- Composed of a group of the most respected leaders in the workplace who are representative of the workforce. Both members and potential members.
- The Committee members are the organizers of the Association/Union in the building/school.
- They work as a team and set goals and benchmarks for their work as organizers.
- They act as a group and not as individuals; always aiming to engage in collective action.
- They obtain and keep the necessary information to be able to reach their colleagues at any time.
- The building's organizing committee helps the Local put together the Local's organizing committee.

- They identify potential leaders and engage co-workers in the activities of the Local.
- They will listen to their co-workers' issues and collectively will try to strategize for solutions.
- The members will be trained on collective action and will also conduct trainings as they become more familiar with the subject.
- They will be trained and will conduct one-on-one interviews with their colleagues, and will keep detailed records of those conversations.
- They are able to listen patiently, and when colleagues feel listened to they grow closer to the organization.
- They provide the same responses as other members when asked the same questions, and they are also able to say: "I don't know, but let me find out for you." They speak with one voice.
- The members of the Committee build solidarity in the workplace.
- They are trustworthy and keep confidences. They DO NOT gossip.
- They maintain a positive outlook when faced with a crisis and are always looking for an organizing opportunity; always reminding their co-workers that they can achieve much when working together.
- Committee members display good common sense when faced with adversity.
- They accept feedback and admit mistakes, but invariably look forward to making a change and not staying stuck in the error.
- They maintain a consistent message that is education centered and not tied to a political party or ideology based.
- Committee members will ensure their colleagues are informed of all Association/Union activities, regardless of membership status.
- They will have as a goal to gain buy-in from all the members and potential members working with the organization.

# Organizing for Community Support

## Community Organizing Tools

- Sample Member Community Organizing Survey
- Sample Checklist for Potential Community Contacts
- Living Wage Questionnaire



Developing allies in the community should be a priority for every Association. Community groups, parent organizations, religious leaders, politicians, and others are more likely to stand with us if we have identified issues of mutual concern and if we have a history of working together.

Education support professionals are often active members of groups outside the school setting, from churches to political parties to volunteer organizations, and generally live within the communities where they work. Take the time to discover relationships that already exist between members and community groups. Members may live next door to or socialize with school board members or local politicians. They may be friends with local journalists at newspapers or radio and TV stations. We need to identify all relatives and relationships that our members have encompassing their respective school district. It is also important to identify all the connections that our members' close relatives and friends have to the communities where they live and work. Be especially mindful to determine parents and relatives who are vocal supporters of public education.

All of this information needs to be entered into your database. Being able to quickly identify sources of support will be vital in campaigns to pressure the employer to negotiate favorable contract terms or resolve workplace issues.

## Make a list of all potential community groups where your members are stakeholders, such as:

- PTA/PTO
- Booster clubs for bands, sports, cheerleading, high school glee club, etc.
- Boy Scouts, Girl Scouts, boys' and girls' clubs
- Little League, Pop Warner, soccer teams, etc.
- Book clubs, cooking clubs, etc.
- Places of worship
- Other charities

Keep adding to this list and remember to expand your community reach beyond your geographical boundaries.

# Community Organizing for Social & Racial

The process of change has two fundamental strategies. One is dismantling structures of inequity while the second is creating structures of social and racial justice. If we don't have something to replace what we take down, we will lose the confidence of those we are trying to wake up. This process of waking up and engaging in consciously liberating action is when we feel most alive and inspired and connected. Whatever issue is a person's point of entry, anyone who takes on a struggle and organizes goes through a transformative process in which the world is never the same again.

It is the experience of accessing one's own power and the power of our collective actions. It is the understanding and experience that you don't have to just obey or believe in that external authority – be it parent, administrator, teacher, cop, coach, etc.– that you can trust yourself and your community to do what is needed for everyone to live full and healthy lives. When we have shifted the paradigms that we have often grown up believing, we begin to look to and trust ourselves and each other to create what we need, what feels good, what builds community. In this process, we are creating culture.

As long as racism, sexism, homophobia, ageism, and other forms of oppression exist, we must work to dismantle them at every level. It is a struggle and it is life's work. But ultimately, it is how we choose to engage in this struggle and how we live our lives that will pre-figure the world we want.

People often moan and complain about problems, but ORGANIZE because they believe or know or see or FEEL that there is a better way···

To organize we must be able to tell a story that:

- Is credible

- Has a plan

- Can succeed

- Understands human behavior –fear, habits, likes, etc.

**Let's Organize: Around Issues and Find Solutions – Not Just Focus on Problems**



## An Organizers Role

- Question and listen
- Be concise
- Develop one on one relationships
- Identify and develop new leaders
- Keep meetings short and focused
- Be open, honest, up front – not defensive
- To Challenge
- Provide Humor and HOPE
- Be serious – people's jobs and lives may be stake
- Build relationships
- Develop leaders

The primary role of an organizer is to create a container in which people throughout the community can not only experience and move through their fear and act with courage, but they can also build their power and make change. These are different sides of the same coin and the process for each is integral to the other. Organizers help move people through a process from indifference or powerlessness or rage or victimization into a clear identification of the problem and then a generation of ideas for the solutions. Getting people to identify their vision for the future and then developing a realistic plan to get there using simple achievable steps that make all the difference.

Always remember to work within the community and together with others to build the culture you desire – together what do you want to achieve?

Organizing is about building relationships. People need to feel like they are part of something. It takes people time to develop trust, learn, and move to take risks. Your approach to organizing must be positive and affirming. It's about power, participation and community. It is about asking the questions, which leads others to the information they need to know. This is the first step for people in understanding their own power. Remember, most people know much more than they think. It is about identifying power relationships and how to change them. This is not about "helping". It's about laying down the challenge and making choices clear and letting people make their own decisions – explaining the risks and letting them decide. Respect will be gained by clearly laying out the challenge and letting people pave their own way – people will MOBILIZE and ORGANIZE!

### Helpful Organizing Principles

- One-on-One Communication: Organizing is Relationship
- Ownership: recruit/develop leaders
- Message/Vision: must be one that makes sense, which creates common ground among the community
- Detail Matters – pay attention
- Strategic Plans – without it you will flounder.
- Always be flexible. The best-laid plans may need to be changed or evolve as conditions change.

**Unorganized Workplace Group**

Confused
Apathetic
Scared
Divided
No direction

**Organized Leaders**

Interpret
Motivate
Challenge
Unify
Plan

**Organized Workplace Group**

Understanding
Active
Confident
Working Together
Purpose

"It's not about supplication, its about power. It's not about asking, it's about demanding. It's not about convincing those who are currently in power, it's about changing the very face of power itself." ~ Kimberlé Williams Crenshaw

POWER

# RESOURCES

# SECTION 1
## One-on-One Organizing Tools

# STORY OF SE L F

*Our Stories as a Tool for Change*

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OBJECTIVES:
- Learn the basics of how public narrative works: values, emotion & story structure
- Learn criteria for an effective story of self and coach others on improving their storytelling
- Practice and get coaching on your own story of self

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## EACH OF US HAS A COMPELLING STORY TO TELL

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

## PUBLIC NARRATIVE IS A PRACTICE OF LEADERSHIP

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

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

## THE HEAD & THE HEART

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



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## VALUES INSPIRE ACTION THROUGH EMOTION
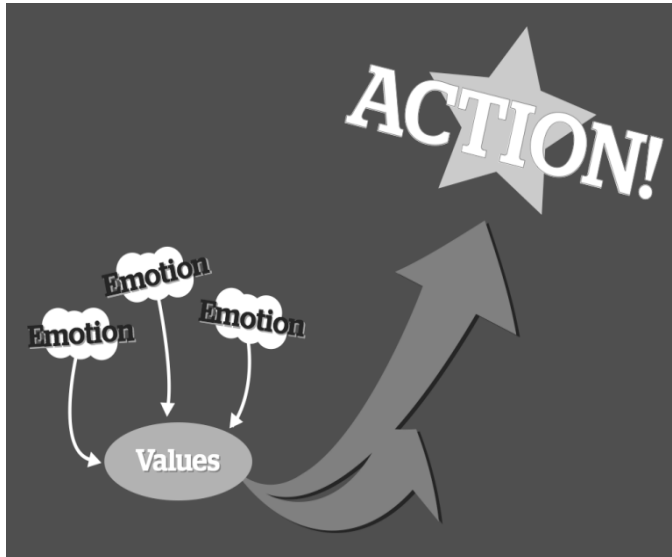


We don't think our values; we feel our values. Often we don't realize what we value in the world until we hear a story or witness an injustice that stirs emotions within us. Emotions inform us of what we value in ourselves, in others, and in the world, and they enable us to express the motivational content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

## SOME EMOTIONS INHIBIT ACTION, OTHERS MOTIVATE ACTION

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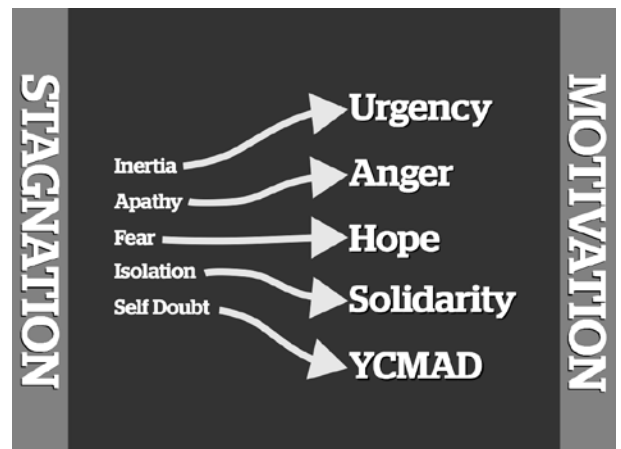


## PUBLIC NARRATIVE COMBINES A STORY OF SELF, US AND NOW

### STORY OF SELF

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

Every one of us has a compelling story of self to tell. We all have people in our lives (parents, grandparents, teachers, friends, colleagues) or characters we love, whose stories influence our own values. And we all have made choices in response to our own challenges that shape our life's path—confrontations with pain, moments of hope, calls to action.

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

## STORY OF US

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

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

## STORY OF NOW

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

A story of now requires telling stories that bring the urgency of the challenge alive: urgency because of a need for change that cannot be denied, urgency because of a moment of opportunity that may not return. A story of now also offers hope—not make-believe hope, but real, plausible hope, often grounded in what others are already achieving, grounded in the courage of others' actions, and in the strategic vision of what we can achieve together. At the intersection of the urgency and the promise of hope is a choice that must be made – to act, or not to act, to act in this way, or in that. Telling a

good story of now requires the *courage of imagination*, or as Walter Brueggemann named it, a prophetic imagination, in which you call attention both to the pain of the world and also to the possibility for a better future.

## STORY STRUCTURE: CHALLENGE, CHOICE, OUTCOME

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

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

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

| Incorporating Challenge, Choice, and Outcome in Your Own Story |
|---|
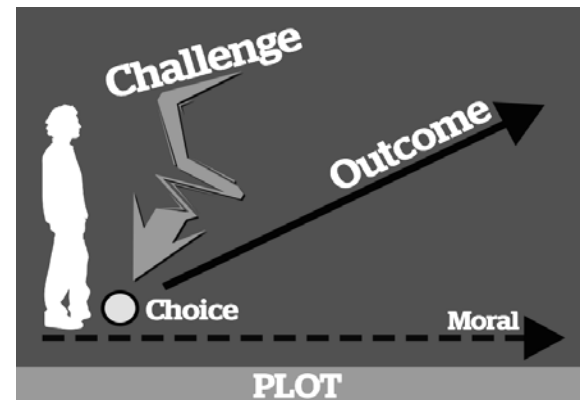


There are some key questions you need to answer as you consider the choices you have made in your life and the path you have taken that brought you to this point in time as a leader. Once you identify the specific *relevant* choice, dig deeper by answering the following questions.

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

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

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

**SAMPLE STORY OF SELF: Lilian Molina**

Greetings. My name is Lilian Maria Molina and I am the Environmental Justice Director at Energy Action Coalition. I am part Mayas-Chorti, Lenca and Palestinian, was born in Honduras, Central America and moved to the United States at the age of 5 with my mother. For the first couple years my mom and I would take an hour-long ride on a two-floor train; I would always rush to the top floor, look out the window, and envision what I would do at our destination.

I would imagine the cartoons I would watch, salivate over the Kudos and Pringles I would be able to eat, and think about all the great toys I would play with. Then one day, as I was playing with a fully equipped Barbie Mansion, my mom reached over and handed me a bottle of Windex and paper towels; at that moment I realized that our hour-long train ride wasn't a field trip, it was a commute to work. My mom and I were there to clean houses not to play.

From that moment on I started to notice that things looked very different in different parts of town. I wondered why some families lived in three floor homes, while I lived in a one-bedroom basement apartment with two families. I wondered why the park equipment in my neighborhood was always broken, but was fancy and new on the other side of town. I wondered if people in the neighborhood where my mom and I cleaned houses had to worry about La Migra coming to their jobs or their homes. I wondered if the kids at these houses ever had to miss school to translate for their parents. I wondered why the police didn't arrest kids around these houses for standing on the corner but my friends back in the neighborhood were arrested all the time. I slowly started to understand that these were two separate worlds.

As I got older, I would refuse to take the hour-long train ride with my mom, instead I would hang out with my friends in the neighborhood. When I was 12, my mom noticed that I was starting to get involved in some risky activities. She decided to send me to Honduras for the summer to spend time with Mi Abuelita (grandma). That summer Mi Abuelita, a Natural Healer and Master Gardener, helped me connect to my ancestral roots and taught me how to love nature through gardening. I learned about all the different plants that she used to help heal people and deliver babies - it was an eye-opening experience. That summer I also realized that some of the people that looked like my family and I wore suits to work and lived in houses rather than apartments.

When I came back to the U.S, I returned to hanging out with my friends; but when I was 16, I decided I was done watching my friends get beat up, get beat by the cops, or arrested. My friends and I started hosting different activities to keep our friends from joining street gangs. Throughout high school we organized different events, from parties, to walkouts to bring awareness to the violence in our communities. Around this time I remembered how the garden that Mi Abuelita introduced me to helped me to heal, and started wondering if a garden in our community could have the same impact for other young people. I got super excited and started looking for plots of land around the school. But in my search I learned that most of the land in Little Village was contaminated with industrial pollution. I thought to myself, "You have to be kidding me, on top of all of the issues I was aware of, our land is also polluted? We have poor education, gang violence, police brutality, immigration raids, militarization of schools and we also have contamination in our community? What the heck else could be wrong?" I learned that what my community was experiencing is called Environmental Racism and what we need is Environmental Justice before we can plant gardens here in Little Village…and that is what brought me to the work that I am doing now.

Now I am here at Power Shift with Front-line Community Members and our Allies, working with the leadership of front-line communities and helping them create a trans-local movement to oppose corporate power is where there is strategic need for youth leadership

1. What values did this story convey? How? By telling or showing?

2. What details or images in particular reflected those values?

3. What were the challenges, choices and outcomes in each part of his story? What morals do the outcomes teach?

# SMALL GROUP WORK

## AGENDA

### GOALS

- ☐ Practice telling your Story of Self and get constructive feedback
- ☐ Learn to draw out and coach the stories of others

### AGENDA
Total time: 35 min

| | | |
|---|---|---|
| 1. | **Choose a partner** from the table you're sitting at. Ideally this is someone you do not know that well. Do a brief introduction (name and place your from)<br><br>**Fully review these directions before starting** | 5 min |
| 2. | Take some time as individuals to **silently develop your "Story of Self."**<br>• Use the worksheet that follows. | 10 min |
| 3. | Take some time to **review the coaching tips** on the page that follows the worksheet<br>• Good coaching questions and feedback from others are key to making your story of self stronger | 5 min |
| 4. | **Share with your partner.**<br><br>For each person:<br>• Take 3 minutes to tell your story<br>• Take 4.5 minutes to coach your partner<br>    ○ What values did the storyteller convey? How specifically?<br>    ○ What is the **Challenge**, **Choice**, **Outcome** in the story? Write them in the boxes on the worksheet that follows.<br>    ○ Were there sections of the story that had especially good details or images (sights, sounds, smells, or emotions of the moment)?<br>    ○ How did those details make you feel?<br>    ○ What could the story teller do to more effectively convey why they are called to leadership in this campaign? | 15 min |
| 5. | **Return to whole room group** | |

# WORKSHEET

## DEVELOPING YOUR STORY OF SELF

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

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

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

| FAMILY & CHILDHOOD | LIFE CHOICES | ORGANIZING EXPERIENCES |
|---|---|---|
| Parents/Family<br>Growing Up<br>Your Community<br>Role Models<br>School | School<br>Career<br>Partner/Family<br>Hobbies/Interests/Talents<br>Faith<br>Overcoming Challenge | First Experience of organizing<br>Connection to key books or people<br>Role Models |

Think about the challenge, choice and outcome in your story. The outcome might be what you learned, in addition to what happened. A story doesn't have to be dramatic to be effective!

Powerful stories leave your listeners with detailed images in their minds that shape their understanding of you and your calling. (You can also try drawing pictures here instead of words.)

| CHALLENGE | CHOICE | OUTCOME |
|---|---|---|
|  |  |  |

# COACHING TIPS:

STORY OF SELF

Remember to balance both positive and constructively critical coaching. The purpose of coaching is to listen to the <u>way</u> stories are told and think of ways that the storytelling could be improved.

**DON'T** simply offer vague "feel good" comments.  ("That was a really great story!")
**DO** coach each other on the following points:

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

    *"When you described_____, I got a clear picture of the challenge."*

    *"I understood the challenge to be_____.  Is that what you intended?"*

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

    *"To me, the choice you made was_____, and it made me feel_____."*

    *"It would be helpful if you focused on the moment you made a choice."*

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

    *"I understood the outcome was_____, and it teaches me_____.  But how does it relate to your work now?"*

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

    *"Your story made me feel_____because_____."*

    *"It's clear from your story that you value_____; but it could be even clearer if you told a story about where that value comes from."*

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

    *"The image of _____ really helped me identify with what you were feeling."*

*"Try telling more details about_____so we can imagine what you were experiencing."*

*Coaching Your Partner's "Story of Self"* As you hear each other's stories, keeping track of the will help you to provide coaching. Use the grid below to track your partner's stories in words or images.

| NAME | CHALLENGE | CHOICE | OUTCOME |
|------|-----------|--------|---------|
|      |           |        |         |

# ONE - ON – ONE
## The Relational Meeting: Purpose and Process

➢➢ To develop a relationship with the person being interviewed

➢➢ To identify his/her concerns/issues

➢➢ To identify networks

➢➢ To evaluate leadership potential of interviewee

➢➢ To "agitate" (raise some questions) around issues that concern the interviewee

➢➢ Create an action to empower the interviewee

# THE RELATIONAL MEETING: AN ART, NOT A SCIENCE

A key organizing activity essential to issue organizing is the one-on-one interview, sometimes referred to as the one-on-one "Hit". A broadening of the skills, purpose, and scope inherent in this issue organizing tool is required for the Relational Meeting, and activity essential to value based organizing.

## A. Purpose of the Relational Meeting:

1. To develop a relationship with the person being interviewed;
2. To build trust through a conscious sharing of stories;
3. To identify interests beyond the superficial level of the immediate issues at hand;
4. To identify his/her concerns/issues;
5. To identify networks
6. To evaluate leadership potential of interviewee
7. To "agitate" (raise some questions) around issues that concern the interviewee
8. Create an action to empower the interviewee

## B. Preparation for the Relational Meeting:

1. The organizer must know his/her own stories and which ones may be appropriate to share in a specific meeting;
2. The "frame" of the meeting must be considered-how to start and how to end;
3. Possible additional questions should be considered-
   a. Why do you do your job?
   b. Where do you want to leave your mark?
   c. What drives you to care about…?

## C. Organizer attitudes and behavior during the Relational Meeting:

1. The meeting is a planned, non-task oriented dialogue;
2. The organizer seeks to develop common ground;
3. Curiosity is the motivation;
4. The organizer engages in strategic vulnerability;
5. Be interesting and interested;
6. Be empathetic

## D. Follow-up tasks:

1. Prepare notes from the meeting which summarize the participant's background, job, history;
2. Identify areas of self-interest which were revealed with energy, conviction, emotion;
3. Reflect on where the participant's interests might overlap with your own and the organization you work with.

# <u>PROCESS</u>

1.  Call – Make an appointment or "schedule time to talk".

2.  Best meeting place is the interviewee's work pace or home. (They will be more comfortable on their own turf.)

3.  Begin with small talk to break the ice.

4.  Frame the purpose of the meeting; (In general terms) tell the interviewee why you are there.

5.  Agenda is the interviewee
    a.  What are their concerns, issues, reactions?
    b.  Don't tell them, ask them. Don't give them your program, let them tell you what they need and want or are willing to do!
    c.  Ask open-ended questions, elicit their responses/reactions.

6.  **<u>DON'T</u>** go from question to question. Probe each question for more information. Encourage interviewee to expand on remarks. (Try to open them up)

7.  Ask about networks. Identify power structure in their building or where they work. (Who else should I see? Why do you think I should talk to that person? )

8.  **AGITATE** by asking questions that cause interviewee to think about issues.

9.  Try to get some commitment from them, some follow-up action on their part. Set up a meeting, agree to talk to someone else, etc.

10. **DO NOT:**       **ARGUE**
    **LIE OR INVENT**
    **TALK MORE THAN YOU LISTEN**

# <u>CHECKLIST FOR OBSERVING RELATIONAL MEETING</u>

1. How did the organizer frame the purpose of the meeting?

2. What kinds of questions were effective to initiate an examination of values, missions?

3. What shared stories were used? What purpose did they serve?

4. Which active listening skills were observed?

   A. Eye Contact

   B. Facial Expression(s)

   C. Body Language

   D. Restatement/Paraphrase

   E. Summarization/Affirmation

5. Who seemed to be in control of the meeting?

6. Instances of agitation?

7. Elements of public drama?

**ONE-ON-ONE**

# AN ORGANIZING CONVERSATION

Here are some guidelines for a fruitful conversation (or a series of conversations) with a co-worker.

Nobody should follow a script mechanically, of course. Talk with people like human beings! But think of this outline as a tool. The steps can help you move toward a goal, so your co-worker isn't left feeling like her time's been wasted with a spiel or a gripe session. Done right, an organizing conversation leads to action.

Your job is mostly to ask questions. You want your co-worker to realize:

· She cares about a problem.
· There's a decision-maker who has the power to fix this problem.
· The decision-maker won't fix it until someone pushes them to.
· If your co-worker really wants this problem fixed, she has to join you and other co-workers in taking action.

But just telling her all this wouldn't be very effective. Instead, you want to ask the right questions that get her to say it herself. We tend to remember what we said, not what the other person said.

## 1.  DISCOVER THE ISSUES

Begin by asking questions—and listening to the answers—to learn what your co-worker cares about. Make your questions open-ended, especially when you're getting to know someone.

> *How's your day going?*

> *How did you get this job?*

> *What was it like when you first started here?*

When you're organizing around a particular issue, your questions might get more pointed. Still, even if you have a petition about the awful new schedule, don't leap straight into "Will you sign this?" Instead, ask:

> *How's the new schedule working for you?*

The point is for your co-worker to remind herself how she feels about this problem, before you ask her to act. If you've discussed this issue before, you can still ask how it's affecting her today, or share someone else's story and get her reaction.

ROLE PLAY

# Role Play lesson
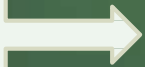
Let's begin → Introduction

Let's talk → Role play and you

Let's listen → How and when to use it?

Let's play! → Role Play activity

# Introduction – Let's begin!

Role play can

feel risky to

some

learners.

- **Role play in the classroom**

# Role play and you

Let's talk!

Simulation Exercise
- Dynamic
- Apply skills
- Make sense of theory

- Life-like setting
- Emotions, attitudes, feelings
- Continuous feedback

**What is it?**

**Goals and Characteristics**

- **Let's hear from you**

# Advantages for adult learners -

Let's listen

Respects prior knowledge and experience

Develops all domains of learning:

- Cognitive
- Affective
- Psychomotor

# Advantages and Disadvantages

Let's listen

## Advantages

- Active participation - energizing and fun

- Time efficient

- Experiential learning is powerful

- Delivers complex concepts in a simple manner

## Disadvantages

- Participants may be too shy and reluctant

- Can be threatening to some

- It can become 'too much fun' and disrupt the task

- Participants can get too involved and loose objectivity

- Participants can overact and show off The observers may not observe well or take notes

- The observers may take 'sides' based on their preconceptions

# How does role play work?
Let's listen

- Observation

- Modeling

- Reflection

- **Key steps to conducting a role play**

  a) **Define aims and objectives**

  b) **Define setting**

  c) **Define role descriptors**

  d) **Define time limit**

- **Key steps to conducting a role play**

  **e) Define observer tasks**

  **f) Define ground rules of safety and feedback**

  **g) Define debrief agenda**

  **h) Define facilitator tasks**

# Let s play!



## An Organizing Conversation

# Wise words…



I HEAR AND I FORGET.
I SEE AND I REMEMBER.
I DO AND I UNDERSTAND.
— CONFUCIUS

## 2.   AGITATE

React to what she tells you, and ask follow-up questions. By reacting, the organizer can help the other person feel she has permission to be angry:

> *Wow. How long has that been going on?*

> *How does that make you feel?*

> *Is that okay with you?*

> *How are you coping?*

> *How is that affecting your family?*

## 3.   LAY THE BLAME

Get her talking about who's responsible.

> *Why do you think we're having this problem?*

> *Who's in a position to fix it? What would they have to do?*

> *Do you think this problem is going to correct itself?*

Many times we feel our problems are just "the way things are." Realizing that bad conditions didn't fall from the sky can be empowering. If someone made the decision that caused this mess, that someone could also unmake it.

## 4.   MAKE A PLAN TO WIN

Now that your co-worker is angry, it's time to offer some hope. Hope comes from your power in numbers and a winnable plan. That's how you make your problem into a problem for the decision-maker.

> *Most people want to go back to the old schedule. The supervisor hasn't listened, but what if 25 of us sign this petition, and we all march into his office together to deliver it?*

> *What do you think he'll do? Will he be able to keep ignoring us?*

> *What's his boss going to say?*

This step will be trickier if today's petition doesn't address a problem that this person feels strongly about. You'll have an easier time organizing if you choose issues that are widely and deeply felt—we'll talk about that in Lesson 4.

But what you can say is that power in numbers is our only way to get a say on any issue. For instance:

> *If we win on this issue, do you think management will learn something? Will taking action on the next issue be easier?*

> *This is the first step. We've all got to start backing each other up. How else are we going to build enough power to fix the understaffing you're talking about?*

## 5.  GET A COMMITMENT

Ask the member to be part of the solution by taking a specific action.

> *Will you sign this petition and come with us to deliver it on Thursday?*

If someone is fearful, acknowledge that her fears have real reasons behind them. But still, things won't get better unless she gets involved. Your job isn't to convince her that she's wrong about her fears, but that she needs to act anyway.

> *Is the schedule ever going to get fixed if we don't take action? Are you willing to let this problem go on?*

Helping her through it will be a lot easier when you're inviting her to act on what she's already said—not pushing an action you're trying to "sell."

## 6.  INOCULATE AND RE-COMMIT

Now your co-worker is committed—but does she know what she's getting into? Ask how she thinks management will react to the action.

> *What do you think the supervisor will say when we go to his office?*

If there's a likely risk she hasn't thought of, warn her about it.

> *What if he gets angry and threatens to write everyone up? What if he offers to meet with one or two of us but not the whole group?*

Talk through the possible outcomes. Then ask whether you can still count on her participation.

> *Does any of that change your mind?*

This part might sound like you're undermining your organizing. You've gone to all this work to help your co-worker decide to act, and now you're trying to talk her out of it? But like inoculating against a virus, the idea is to help her develop an immunity to management's attacks—by giving her a small dose before she's exposed to the real thing.

This way, when management reacts, she won't be thrown by it. In fact, your correct prediction will boost your credibility.

## 7.   SET A FOLLOW-UP PLAN

As organizer Fred Ross put it, "90 percent of organizing is follow-up."

Agree on the next step, and when you'll check back in. Maybe she's going to meet you Thursday to deliver the petition, or she'll ask two co-workers to sign. Or maybe you simply promise to report back on Friday about how the meeting went.

Remember, you're not just trying to pull off this one action. You're also trying to draw people gradually closer to the center and build an ongoing network of communication. You're trying to make standing up, in an organized way, a normal and natural part of workplace life.

> *Can you ask Jane to sign? Great! I'll come back at the end of the shift to find out how it went, okay?*

# Conducting a One-On-One Conversation
## Key Components

1. The Introduction/Greeting

2. Getting the Story/Listening/Using Openu  Ended Questions

3. Making Connections

4. The Ask

5. Thank You and Followu  up


Examples of open-ended questions:


What brought you into this work?

What excites you about working here?

What are some of the changes you would like to see in the workplace?

What worksite issues do you and your co- workers talk about the most?


It is important to remember that the "why" questions get to issues of values and interests. The "how" and "what" questions get to capacity and commitment.

# EXERCISE: PRACTICE THE ORGANIZING CONVERSATION

It can feel awkward at first, encouraging your co-workers to get mad and challenging them to face their fears. But like anything, it gets easier with practice.

If you're reading this in a workshop or as a group, pair up and practice the conversation. Take turns playing the role of organizer. If you're reading this on your own, ask an experienced organizer to be your partner, or recruit a friend or family member to try it out.

## REMEMBER THE STEPS

Ask about the other person's real job, whatever it is. Pretend you work there too, but you don't know much yet—maybe you're new. Have him give you a plausible setting for the conversation, such as the lunchroom. Ask him to do his best to answer your questions honestly, as if this were for real.

Start with *issues*. Ask as many questions as you can think of, to find out what he loves and hates about the work, what's changed over time, what he would fix if he had a magic wand. Don't rush.

When you think you've zeroed in on the issue he cares about most, move into *agitation* and *laying the blame*. See if you can get him to say out loud that he's ready to do something to solve this problem, and to name who's responsible.

Move into a *plan to win*, and inspire him with the idea of strength in numbers. Ask him to *commit* to a specific action. Do some *inoculation* about the risks and ask him to recommit. Set a *follow-up plan*, when you will be back in touch.

## HOW DID IT GO?

Afterwards, debrief with your partner. Find out how he felt about the conversation.

- Did you correctly identify his top-priority issue?

- What else could you have asked about?

- What parts of the conversation really made him think?

- What parts did he enjoy?

- If he agreed to take the action, why did he decide to do it?

- If he didn't, what could have made him reconsider?

# EXERCISE: WRITE YOUR OWN ORGANIZING CONVERSATION

Choose a real issue from your own workplace: _____

Choose a possible action you might organize to address it: _____

Choose a real co-worker: _____

Imagine you're going to approach him or her about joining you in action. You want to cover all the bases of a good organizing conversation. What questions would you ask at each step?

1. **Discover the issues**. Ask questions to learn what your co-worker cares about. Make your questions open-ended.

_____

_____

_____

_____

2. **Agitate**. React to what she tells you, and ask follow-up questions. Help the other person feel she has permission to be angry.

_____

_____

_____

_____

3. **Lay the blame**. Get her talking about who's responsible.

_____

_____

_____

_____

4. **Make a plan to win**. How could you use your power in numbers to make your problem into a problem for the  decision-maker?

_____

_____

_____

_____

5. **Get a commitment**. Ask the member to be part of the solution by taking a specific action.

_____

_____

_____

_____

6. **Inoculate and re-commit**. Does your co-worker know what she's getting into? Help her develop an immunity to management's  attacks.

_____

_____

_____

_____

7. **Set a follow-up plan**. Agree on the next step, and when you'll check back in.

_____

_____

_____

_____

# Worksite One-on-One Conversations Reporting Form

Please return this form to. _____

as soon as possible after conducting the one-on-one interviews.

Your name: _____

Your worksite: _____

Names of members/ potential members you met with: _____

Dates of conversations:

_____

_____

_____

## Tally

Number of unit members at your worksite: _____   _____

Number of unit member 1-1 conversations you held: _____

# General One-on-One Conversation Reporting Form

**NAME** _____

**ADDRESS**_____

**TELEPHONE**_____**PERSONAL CELL**_____

**PERSONAL EMAIL**_____

**JOB CLASSIFICATION** _____

**YEARS IN THE COMMUNITY** _____

**ORGANIZATIONAL AFFILIATIONS (ie, Book Clubs, Women's Clubs, Brownies, Boy Scouts, Little League, Bowling League, Volunteer work, Sport's Clubs, Extra Curricular Activities, VFW, etc)**

_____

_____

**HOW MANY RELATIVES/GOOD FRIENDS DO YOU HAVE IN THE COMMUNITY AND IN WHAT ORGANIZATIONS DO THEY PARTICIPATE?**

_____

_____

**PLACES OF WORSHIP**

_____

_____

**WHAT OTHER CO-WORKERS SHOULD WE TALK TO ABOUT THIS ISSUE?**

_____

_____

**ISSUES/COMMENTS/SKILLS**

_____

_____

_____

**RATINGS**

1) **WILL DO ANYTHING FOR THE ISSUE**
2) **SYMPATHETIC**
3) **FENCE STRADDLER**
4) **OPPOSED**

# HOW TO BE A GOOD LISTENER

- **Avoid distractions**. Look the other person in the eye, and put your phone away.

- **Slow down**. Our brains process thoughts four times faster than spoken words. It's easy to skip ahead in a conversation, using your assumptions to fill in the gaps and plan your response. Resist this urge. Focus on what is actually being said.

- **Don't interrupt**. Take the time to hear the full story.

- **Keep an open mind**. Don't assume you already know what someone cares about. People will surprise you.

- **Don't fish**. Avoid leading questions like "Don't you agree that…"

- **Practice empathy**. Sometimes people need to let off steam. Don't discourage them. Your immediate task is to hear what they have to say, not to judge.

- **Show that you hear what they're saying**. React, ask follow-up questions, and repeat back what you understood. If you don't understand, ask.

- **Find common ground**. You don't have to agree with every point, but look for areas of agreement, and acknowledge where you differ.

- **Don't feel you need to sell something**. An organizer is not a salesperson. You're genuinely looking to learn the other person's point of view and create something new together.

# A.H.U.Y. THERE!

The acronym "A.H.U.Y." is a helpful shorthand for what it takes to move someone to act:

**Anger**: This is an injustice. We have to fix this.

**Hope**: Change is possible. We can fix this. Here's our plan.

**Urgency**: Now's the time. We can't wait any longer.

**You**: can make a difference. Your participation matters.

BLANK

# THEORY OF CHANGE

"How can we turn our resources into the power we need to win change?"

# A C K NOW L ED G EM ENT S

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

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# STRATEGY : THEORY OF CHANGE

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**OBJECTIVES:** By the end of this session you will…

- Understand strategizing as a dynamic ongoing process (not a static document)
- Practice analyzing power as a relationship, not a thing or quantity that can be owned.
- Practice creating a power-based theory of change

**RELATED SESSIONS:**

- [Tactics and Timing](#)

## WHAT IS STRATEGY?



In order to create change in the world we have to engage in action. But in order for that action to mean something it needs to be guided by a clear, compelling strategy that lays out a believable path to change. That doesn't mean the path will be easy or certain, but it has to make sense to you and your people.

The work of strategy and the purpose of this session is **figuring out how to turn <u>what you have</u> into <u>what you need</u> to get <u>what you want</u>**; how to turn the resources you have into the power you need to achieve a specific, measurable goal.

Strategizing is a natural process, something we do every day as we travel from home to work, or look in the refrigerator and try to figure out how to make a meal from random foods, or figure out how to juggle multiple responsibilities, or make plans for how we want our own lives to unfold. Strategizing doesn't require experts. It requires a deep familiarity with your own resources and those of your community, and a clear understanding of the people and the landscape around you, so that you can figure out together how to organize your resources into the power you need to win concrete change in your lives.

# CHARACTERISTICS OF GOOD STRATEGIZING

## Strategy is collaborative

Strategy is most dynamic when the group responsible for strategy brings diverse experience, background and resources to the table. Who is responsible for strategizing in your campaign? How can you increase the diversity, and in turn increase the capacity of this group to strategize creatively? Does your strategy team deliberate well? (Is there clear space created for open, creative brainstorming as part of the strategic process, before decisions are made?) Can your strategy team move quickly? (Is there a norm for making decisions in a in a way that includes everyone and also responds to the urgency of time?)

## Strategy is motivated

We strategize in response to an urgent challenge, a unique opportunity to turn our vision for change into specific goals. We commit to the goal first, then we figure out how we will get there. Commitment to the goal cannot be conditional on figuring out exactly the right path to get there, or we'll never get started. **Goal first, then strategy.**

Take the Montgomery Bus Boycott in 1955 for example - what challenge did the boycott leadership respond to? What was their motivating vision? What specific goal did they commit to and remain committed to until the end? What goal for change motivates you? Without deep commitment to your motivating goal, no strategy will succeed.

## Strategy is creative

Strategy is creative and dynamic, not habitual. If you've committed to a motivating goal that requires a change in the status quo, then status quo strategies and tactics won't work for you. Strategy is a theory or hypothesis of how we can turn what we have (*resources*) into what we need (*power*) to get what we want (*achieving goals*). **This means strategy is by necessity unique to our specific resources and our specific goal.** That means we really need to ask ourselves when launching into a strategy or new set of tactics, "what's our theory for how these tactics will help us meet our goal? Have these tactics created similar results in the past? Is it believable they'll create the results we want this time?" If you can't answer that question convincingly, then you'll need to intentionally generate new tactics.

**Strategy is intentional**
Challenging the status quo requires making up for our lack of resources by using the resources we do have intentionally, enabling creative resourcefulness. In the bus boycott the leadership turned the resources of their constituency (a simple bus fare) into power by mobilizing that resource collectively. Remember, power is nearly always dependent on the participation of the powerless. Disrupting that participation can get the attention of decision makers and shift the balance of power. **An effective strategy is one that intentionally builds power in relationship to those who control the resources we need to win change.**

**Strategy is a verb**
(Something we do), not a noun (something we have). As we work toward our goal we learn from our successes and failures to adapt our tactics to become more and more effective over time. **Strategizing is an  ongoing process** we engage in on a day-to-day, week-to-week basis, not just something we create once then follow for years.

**Strategy is something we do every day**
Every time we figure out how to get from one place to another, or solve a problem in our lives, we're strategizing.

To summarize, strategy requires:

- FIXED COMMITMENT TO YOUR GOAL: The goal is a clear measurable point where you know if you've won or lost. It's measured by tangible change in our lives, not just by legislation or information. Unwavering commitment to your goal enables focused personal and organizational growth to meet it.

- CREATIVE USE OF RESOURCES: Begin with the resources you have and brainstorm how to get those you need in order to shift relations of power.

- FLEXIBILITY IN TACTICS: Strategy is a theory about how to use your resources to meet goals. It requires that you constantly test your theory by trying new tactics, evaluating them and improving over time, while staying completely committed to your ultimate goal.

**GETTING STARTED**

**1** **What change do we want?**

**2** **Who has the resources to create that change?**

**3** **What do they want?**

**4** **What do we have that they want?**

**What is our theory of change?**

**The first question in strategizing is to ask what's your theory of change?** All of us make assumptions about how change happens, but we can strategize more effectively if we make our assumptions explicit.

For example, some people hold an Information Theory of Change—they believe that if other people have more information about the problem that will eventually change things. Others hold a Legal Theory of Change, believing that using the courts, or changing laws is the way to guarantee change. Others operate on a Cultural Theory of Change—believing if the culture in general becomes more accepting of new ideas by seeing them represented in cultural venues, change can happen. Others use a Market Theory of Change, building supply or demand to shift market dynamics.

Sometimes these theories do contribute to change. However, **as organizers we operate on a power-based theory of change, believing that if we win change by any means, but have not changed the underlying power dynamics, then we will continue to suffer the symptoms of a deeper problem of inequality.**

In effect, our first organizing question when developing strategies for change is always, "how are relationships of power working in this context?"  Then "how can we proactively organize our resources to shift those relationships of power so that we can win the change we want?"

## UNDERSTANDING POWER

Strategy is about turning the resources we have into the power we need to win the change we want. Think about that for a second. Strategy is simply turning our resources into power and then using that power effectively. **So strategy is empowering—it's based on using what we have effectively, not focusing only on what we don't have.** But it requires that we understand power clearly.

**Power is not a "thing." It's a relationship**, like a see-saw. Sometimes other people have what we need, and sometimes we have what they need. Both sides have resources. Whoever has more organized and desirable resources in a given moment has more power in that moment. When someone needs less from you than you need from them, then they have power over you. **However, if you can figure out what you have that they want, then you can shift the balance of power in your relationship.**

There are two basic types of power: power with and power over.

### POWER OVER

Sometimes others hold power over decisions or resources that we need in order to create change in our lives. If someone or some group has power over us it means they think they don't need us or our resources to get what they want. So the work of organizing is figuring out
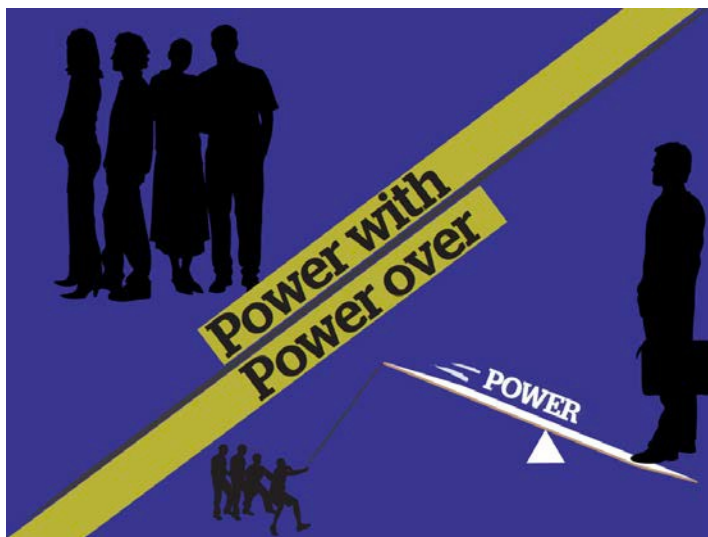


how to grow our own resources, or shrink theirs, so that we have equal need of each other and can negotiate change together.

### POWER WITH

Sometimes we can create the change we need just by organizing our resources with others, creating power with them. For example, we might pool resources to create a cooperative day care, or a community credit union, or a volunteer service bank.

# CHANGING POWER OVER

When we have to engage with those who have power over us in order to create change, we ask ourselves four basic questions.

1. What change do we want?

2. Who has the resources to create that change?

4. What resources do we have that they want or need?

3. What do they want?

The Strategy Question:

5. What's our theory of change? How could we organize our resources to give us enough leverage to get what we want?

# CASE STUDY: UNITED FARM WORKERS

Here's how Cesar Chavez and the United Farm Workers answered the questions on the previous page when they built a movement to organize California Farm Workers.

1. **What change do we want?**
   Fair working conditions, better wages

2. **Who has the resources to create that change?**
   Farm bosses (growers), and elected officials

3. **What do they want?**
   Farmers want to sell their grapes, and elected officials want votes.

4. **What resources do we have that they want?**
   Our labor, our votes, and the money our consumer allies spend on grapes.

5. **What's our theory of change? How could we organize our resources to give us enough leverage to get what we want?**
   We can make the boss negotiate by going on strike. If that isn't enough, we can organize a national boycott of grapes in every major city so that our bosses feel economic pressure to negotiate a contract with us. We can also register ourselves and our allies to vote and turn out to vote so that elected officials can join us in putting pressure on our bosses and also change the laws that govern our work.

| PUSH | PULL |
|---|---|
| What are some specific times that you've seen others organize to their resources to push into a relationship of power? For example, an extended sit-in, or getting out the vote? | What are some specific times that you've seen others gain power by organizing to pull their resources away? For example, strikes or boycotts, or withdrawing all their money from one bank at the same time? |
|  |  |

9

# TEAM BREAKOUT SESSION
CREATING A THEORY OF CHANGE

*Goal*
Develop a Theory of Change about how to organize your resources to get more power in relationship to the people you are trying to move to create the change you want.

*Agenda*
**TOTAL TIME: 45 min.**
**NOTE: BE SPECIFIC WHEN ANSWERING THESE QUESTIONS!**
Imagine if the Farm workers had said "let's boycott all fruit" instead of "let's boycott grapes." Or imagine if Martin Luther King had said to the Black community in Montgomery, "don't go shopping or take the buses or go to school tomorrow" instead of making a choice and saying "everyone, don't take the buses!" **The skill of organizing is making hard choices that focus lots of people on the same outcome**

| | |
|---|---|
| **Review Agenda & Goals, Choose a timekeeper and note taker** | **5min** |
| **Question 1: What change do we want?** <br> What are our interests, what are we after, what is our dream? How do we articulate that as a specific goal?  What concrete change will we see in our lives if we win? | **10 min** |
| **Question 2: Who has the resources to create that change we want?** <br> What are their names, what organizations do they work in or lead in, what titles or roles do they have? What specific decision-making power or resources do they have that we need? | **5 min** |
| **Question 3: What do they want? What do they care about?** <br> What are their specific interests? Where does their power come from? Votes? Donations? Money from us paying our bills? Compliance? | **5 min** |
| **Question 4: What resources do we have that they want or need?** <br> What specific resources do we have (maybe ones that we give away without thinking about it every day) that, if organized, could turn into power vis-a-vis the decision maker we identified in Question 2? | **5 min** |
| **Question 5: What's our theory of change?** <br> How can we organize our resources to affect our decision makers' interests? What would make the person you identified in Question 2 come to the table to negotiate with you? At what point will they actually FEEL your power? When it looks like they couldn't get re-elected without your votes?  When their business will shut down without your bus fares? <br><br> Step back and look at your theory of change. Do you actually believe the people in your answer to Question 2 will feel your power if you act on this theory? Will your strategy only last for one day? Or do you have a way to keep your power organized over time until the people in Question 2 negotiate or work with you as equals? | **10 min** |

# WORKSHEET
DEFINING A THEORY OF CHANGE

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→ **Question 1: What change do we want?** What are your interests? What are your dreams? What change are you after? How will you know if you've won that change or not?

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→ **Question 2: Who has the resources to create the change we want?**
What are their names, what organizations do they work in or lead in, what titles or roles do they have? What resources do they have? Money? People? Decision-making authority?

```
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→ **Question 3: What do THOSE people want**—the ones with the resources? What do they care about? Where does their power come from? Votes? Donations? Money from us paying our bills? Compliance?

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**→Question 4: What resources do WE have that THEY want (the people in Question 2)?**
What specific resources do we have (maybe ones that we give away without thinking about it every day) that, if organized, could turn into power vis-a-vis the decision maker we identified in Question 2?


**→ Question 5: What's our theory of change?**
What's our hypothesis about how to organize our resources to affect our decision makers' interests? What would make the person you identified in Question 2 come to the table to negotiate with you? At what point will they actually FEEL your power? When it looks like they couldn't get re-elected without your votes? Or they'd lose money if you convince others not to frequent their business?

A hypothesis is an If/Then statement.  IF we do this, THEN we predict that will happen.

| If | Then |
|---|---|
|  |  |

Step back and look at your theory of change. Do you actually believe the people in your answer to Question 2 will feel your power if you act on this theory? Will your strategy only last for one day? Or do you have a way to keep your power organized over time until the people in Question 2 negotiate or work with you as equals?

# Organizing Using the COG Method
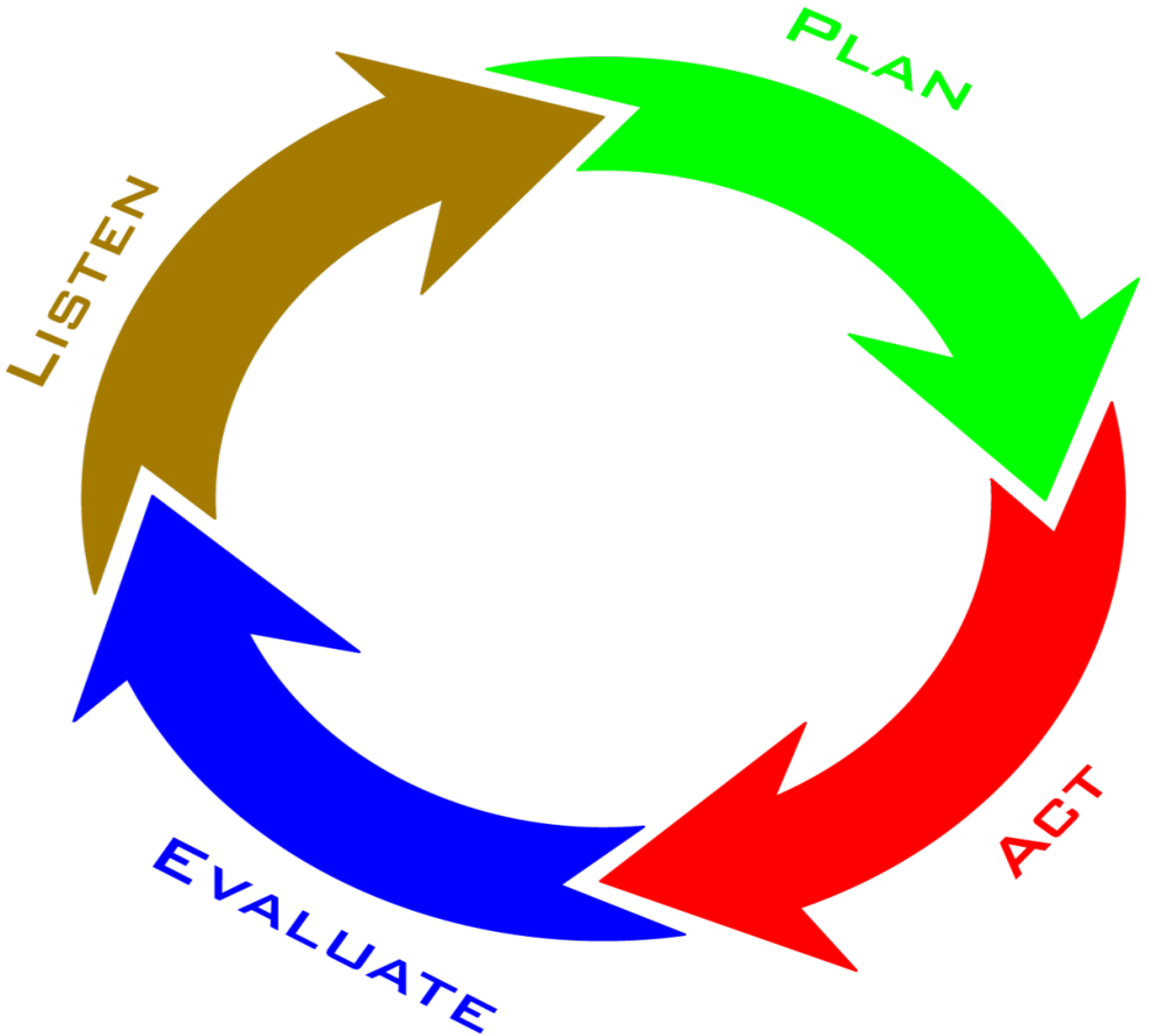
# COG Organizing is:

**LISTENING** is the critical first step to the **goal** identification, **objective** setting, and assessing **membership commitment** -- needed prior to "planning" strategies and tactics

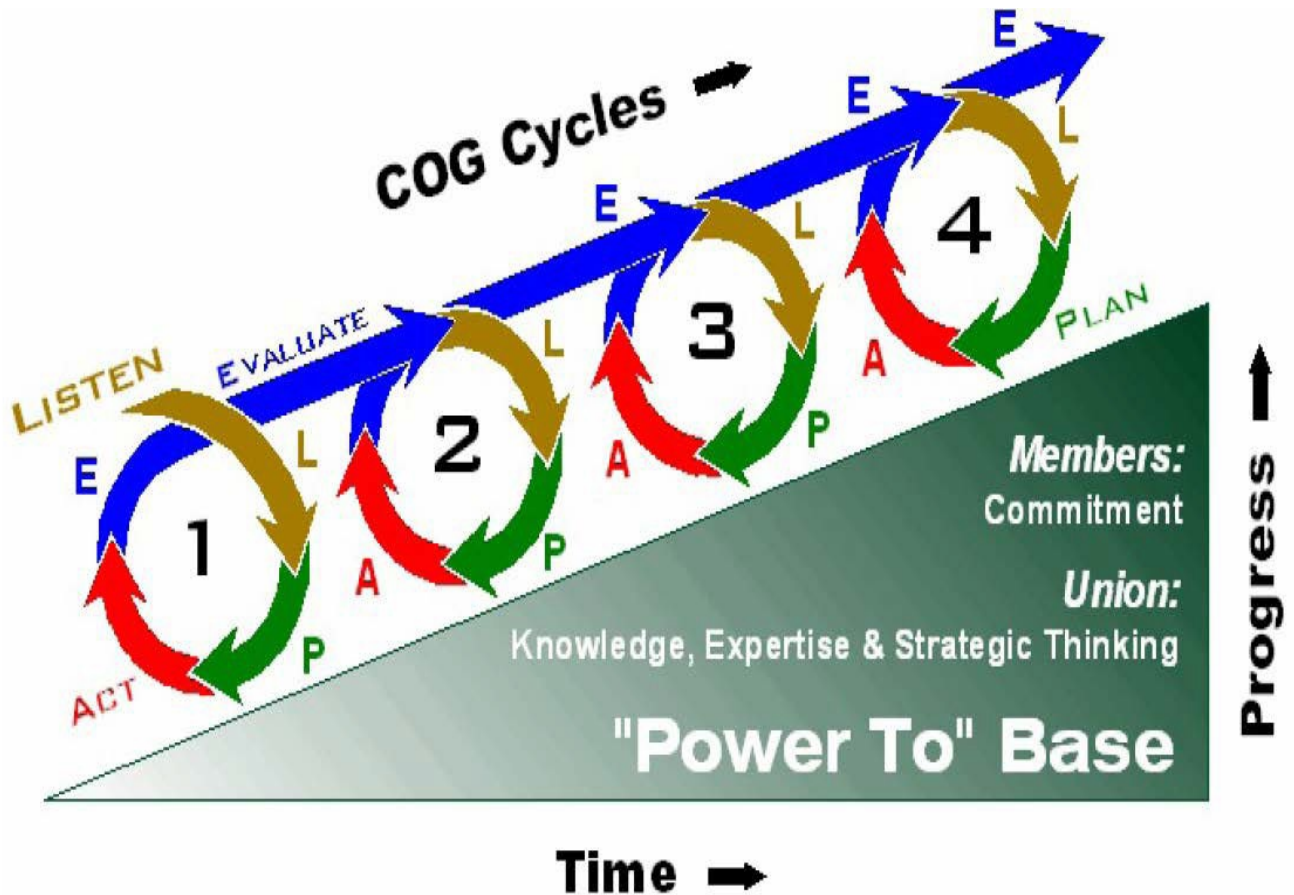**Strategic PLANNING** helps in the assessments of the four critical environments **(internal, external, "community" and "legal")**

**Tactical ACTION** is intended to put pressure on the other side for concessions

**EVALUATION or Reflecting** on "what just happened"
> – learning from what happened and how to do it better

# Progression of COG Cycles

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# SECTION 2
## Issue Identification Tools

# Checklist for Deciding on an Issue

A good issue will meet most of these values.
Use this checklist to compare issues. You may decide to modify or add to this list.

| Issue 1 | Issue2 | Issue 3 | Will the Issue: |
|---|---|---|---|
| | | | 1 . Result in a real improvement in the lives of students, school staff, and community members |
| | | | 2. Give people a sense of their own strength |
| | | | 3. Alter the relationships of power |
| | | | 4. Be worthwhile |
| | | | 5. Be winnable |
| | | | 6. Be widely and deeply felt |
| | | | 7. Be easy to understand |
| | | | 8. Identify the decision–maker |
| | | | 9. Have a timeline that works for your group |
| | | | 1 O. Not be divisive |
| | | | 11. Build leadership |
| | | | 12. Be consistent with the group's values and vision in support of public education and public education employees |

# A GOOD ORGANIZING ISSUE...

- **...is widely felt.** How common is the problem? How many workers face this situation? Many people must feel that this is a real problem and agree with the solution you're pursuing.

- **...is deeply felt.** Is this an issue that people feel strongly enough about to actually do something? It's not enough that many people agree, if none are really hot under the collar.

- **...is winnable.** It's hard to know for sure whether you will win, but it's possible to have a good idea whether you can. Your group should match your demand to the power you've already got.

  To win, you'll need to make it harder for the decision-maker to keep saying no than to say yes. The more pressure you can bring to bear, the more issues will become winnable.

- **...builds the union and builds leaders.** Consider how this fight will build your capacity for future fights. Will the issue attract leaders or groups who haven't been very involved? Will it build solidarity between groups? Will it give you the chance to try an action that's one step beyond what you've done before? Will the solution lay the groundwork for future improvements?

  Each fight should build off the last. It often happens that we don't win the concrete gain wanted, but we do come out smarter and better organized—which makes it more likely we can win next time.

# Issue Selection

**Checklist for Choosing an  Issue:**
A good issue is one that matches most of the following criteria. Use this checklist to compare issues or develop your own criteria and chart for choosing an issue.

| Issue 1 | Issue 2 | Issue 3 | Will the Issue… |
|---------|---------|---------|------------------|
|  |  |  | 1) Win real improvement in people's lives |
|  |  |  | 2) Give people a sense of their own power |
|  |  |  | 3) Alter the relations of power |
|  |  |  | 4) Be worthwhile |
|  |  |  | 5) Be winnable |
|  |  |  | 6) Be widely felt |
|  |  |  | 7) Be deeply felt |
|  |  |  | 8) Be easy to understand |
|  |  |  | 9) Have a clear target |
|  |  |  | 10) Have a timeframe that works for you |
|  |  |  | 11) Be non-divisive |
|  |  |  | 12) Build leadership |
|  |  |  | 13) Set your organization up for the next campaign |
|  |  |  | 14) have a pocket book angle. |

# EXERCISE: EVALUATE AN ORGANIZING ISSUE

Have you started mulling over some possible organizing issues at your workplace? Pick one, and answer these questions to help you think through its organizing potential.

### 1. What's the problem?

### 2. What's our proposed solution?

### 3. Is this issue widely felt?

- How many people are technically affected by the problem?

- How many people feel like it affects them?

### 4. Is it deeply felt?

- How much do people care about the issue?

- What are they willing to do about it?

### 5. Is it winnable?

- Who's the decision-maker who could say yes to our solution?

- What would it cost this person to say yes? Consider not just the budget but also the decision-maker's personal or political investment in the issue.

### 6. How much pressure will we have to bring to overcome this person's resistance?

# GETTING THE BALL ROLLING

Say there's a problem where you work. Maybe you have a supervisor who humiliates someone in front of co-workers. You've tried reasoning with him, but nothing changes. You want to do something.

- **Think clearly about the problem** you're facing. Try to get past the emotion—the anger, resentment, shame, or whatever you're feeling about it. Write down the simple facts.

- **Resist the urge** to act only on emotion, or to do something all by yourself. That's often when you're most vulnerable, and you might make more trouble for yourself than for the boss. Instead, take a deep breath and reach out to co-workers.

- **Find someone at work you trust**, and share the facts you've written down. Ask for an honest opinion. If you both agree that this is a serious problem, see if you can come up with the names of other co-workers who are affected, too.

- **Talk one on one** with these other people. So far, you're just checking to see if others agree with you, not deciding what you're going to do about it.

- **Some people will be more concerned than others.** Don't be discouraged. Keep talking—without pestering people—until you find even one person who shares your desire to do something.

- **If you find a small handful of co-workers** who share this problem, get them together, perhaps over a cup of coffee during your break. First share your fears about what could happen if your group did something. Then, talk about what will happen if you do nothing. This will usually help make up your mind to do something! Then start talking about steps you could take.

- **Figure out together** who in management is the decision-maker on the issue. Does this boss know about the problem? How could you approach the boss, collectively? What are the risks and advantages of different approaches?

- **Check your workplace map** from Lesson 3. Think about who's involved so far, and who else you'll need to involve in order to win. Are there key leaders you want to involve early on? Who in your group should approach them, and what approach might work best?

- **Use the information** in Lessons 4 and 5 to make a plan. Take small steps to build your trust as a group. This is the best way to overcome fear.
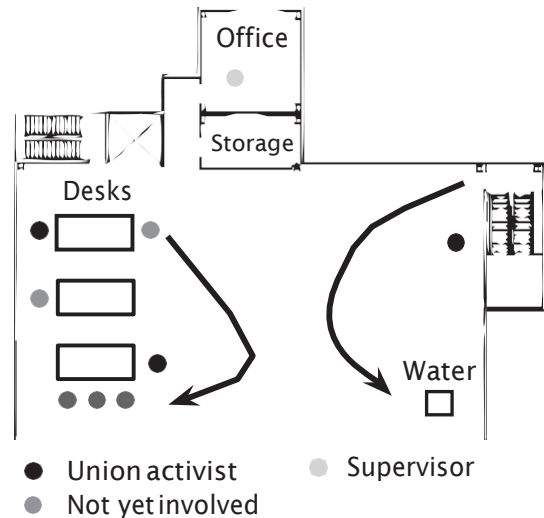
# SECTION 3

## Mapping Tools

# EXERCISE: DRAW YOUR OWN WORKPLACE MAP



You will need:
· Butcher paper
· Color markers
· Sticky dots

● Union activist
● Not yet involved
● Supervisor

Start with the physical space. First, use a flipchart or large sheet of paper and a black marker to outline the area or building, showing entrances, exits, and windows. Label the offices, production lines, storage areas, shipping and receiving docks, lunchrooms, and bathrooms.

Add details such as machines, desks, and water coolers. If the building is large, make maps of different areas. Be sure the map is large enough to show the information clearly.

Add motion. Draw the flow of work or production, and/or the paths that different people take through the space regularly, in different colors.

Are there spots where the flow of work tends to get bottlenecked? These could be important pressure points. Who works there?

Are there places where people congregate, like the break room or the proverbial water cooler? These could be good places for outreach conversations, or group gatherings.

Add all the people. Sticky dots work well to represent workers. You might use different colors to indicate supervisors, union activists, various jobs, or shifts. Mark the dots with initials or names.

## CAN YOU GET A LIST?

It's best to work from a list of all employees in your workplace or department (whatever you're mapping). Otherwise it's surprisingly easy to forget people, especially those you don't work closely with, part-timers, or those with unique jobs.

Maybe you can get this list from your union office, especially if you're a steward. If not, is there a list at work you can discreetly copy or take a picture of? The boss may distribute an emergency phone list, or post a schedule. Be resourceful.

# EXERCISE: MAKE A CHART, TOO

In some workplaces, everyone moves all over the place, and a physical map would be a hopeless jumble. In that case, make a chart instead.

Even if you made a map, you'll find a chart helpful too. Charts are easy to update and allow you to see at a glance where your union is weak and where it's strong. Make a big version to display on the wall. Enter the same information into a spreadsheet you can print out and carry around with you.

**Make a grid**. You might use columns for different work areas or job titles, and rows for shifts.

**Write in all the names**. Some organizers include cell phone numbers and email addresses, to have all the info in one place.

**Map the groups and leaders**. As with the map, use colors and symbols to map out formal and informal connections. Discuss the same questions.

**Color code the chart**. Depending on your goals, you might highlight all the people who have committed to a rally, signed a petition, or worn a button.

**Keep updating**. Continually revise your chart. Track how people's union roles and relationships change.

## SAMPLE CHART

| | Dishwashers | Room Service |
|---|---|---|
| **Day** | Heather A. *Heather@gmail.com* 617-555-1212 <br><br> Jose B. *Jose@gmail.com* 718-555-1212 | Ana E. *Ana@aol.com* ?? <br><br> Mark F. *Mark@aol.com* 908-555-1212 |
| **Swing** | Rose C. *Rose@gmail.com* 206-555-1212 | Charlie G. *Charlie@aol.com* 434-555-1212 |
| | Brad D. *Brad@gmail.com* 808-555-1212 | Lauren H. *??* *??* |

# EXERCISE: MAP OUT HOW PEOPLE CONNECT

**Mark the groups.** Draw a circle around the people who form each work group and each social group, using different colors. If members of a group are scattered all over, indicate them some other way, such as with a certain color or checkmark.

> Who works together?

> Who are all the smokers?

> Who carpools together?

> Who are the Spanish-speakers?

As you identify groups, discuss them.

> How does this group relate to management?

> What are the biggest problems affecting this group?

Keep your observations respectful and factual, not gossipy. The idea is to find insights that will help you organize with these co-workers, not repeat stereotypes or gripes about them.

**Mark the leaders.** Indicate each group's leader with an appropriate color.

> Who's the main leader in this group?

> Are there other leaders in this group?

**Map out union support.** Who's part of your organizing team so far? If there's not a formal group, choose some criteria.

> Who gathered signatures on the latest petition?

> Who's helping to make this map?

Also mark the wider circle of union supporters.

> Who signed the last petition?

> Who is a dues-paying member?

# EXERCISE: ANALYZE YOUR WORKPLACE MAP

**Discuss your map.** You now have a great deal of information about interactions in your workplace. This is a good place to stop and ask yourselves:

> *What do you see?*

Even when people know their workplace well, the map will help them see it with new eyes. Ask open-ended questions.

> *What's going on here?*

> *Do we see any patterns?*

> *How does news travel?*

> *What new questions does this map raise?*

The stories that come out will be about issues that are bothering people. Keep adding to the map, marking which workers are being harassed by management, for instance, and which are facing layoffs. If the map gets too crowded, start tracking the information another way.

**Use your map to identify areas and leaders to focus on.** Making workplace dynamics visible puts valuable information on the table.

> *See this group over here, the one we've never had contact with? Who can talk to someone in that group?*

The next time you go to work, look around and compare the reality to your map.

> *Did we overlook anyone?*

# ANSWERING TOUGH QUESTIONS

On paper and in person, keep the focus on your message. When people come to you riled up over the spin from management, a good way to respond is "Affirm, Answer, Redirect."

**Affirm**: Let them know you're listening, you understand, and their feelings are valid. Your co-workers may be scared or upset by what they've heard. Don't get mad at them. It's management's fault, not theirs.

> *I hear you, I don't want to lose money either!*

**Answer**: Give a truthful, concise answer to the question. Don't be evasive. If there's a grain of truth to management's message, say that up front.

> *Yes, it's true that we could end up paying more for healthcare and this is a serious issue, but we need additional information before we speak to the membership.*

If you don't know the answer, don't guess. Tell them you'll find out and get back to them. Make sure you follow through, to maintain trust.

**Redirect**: But once you've answered the question, don't get bogged down in too much back-and-forth about it. Instead, be ready with a question that brings the conversation back to your message and points out what management is trying to distract them from.

> *If they're so concerned about our pocketbooks all of a sudden, why haven't they given us a raise for two years?*

Remind your co-workers of the issues that inspired them to organize in the first place. Ask whether that's changed. Steer the conversation back to the plan to win, and the next steps.

# ✏️ EXERCISE: PRACTICE ANSWERING THE TOUGH QUESTIONS

1. Pick a message management has used, or might use, to undermine your campaign. If there's a concern that's already been getting traction with your co-workers, use that one. Write the concern the way a co-worker might phrase it: _____

_____

_____

2. Now write what you would say to answer it, using the three steps:

**Affirm**: Let them know you're listening, you understand, and their feelings are valid.

_____

_____

_____

_____

**Answer**: Give a truthful, concise answer to the question. If there's a grain of truth to management's message, say that up front.

_____

_____

_____

_____

**Redirect**: Be ready with a question that brings the conversation back to your message and points out what management is trying to distract them from.

_____

_____

_____

_____

3. Practice out loud with a friend.

# WHEN YOU'RE CALLED
# INTO THE
# OFFICE

If managers start cornering individuals, how can you prepare people? Warn them what to expect. It's helpful to role-play how a one-on-one meeting might go.

Advise your co-workers that there's no need for heroics. Arguing with your supervisor about your campaign won't help. The supervisor's goal is either to intimidate you or to find out information, such as who the leaders are.

Here are some good practices to follow any time you are called into the office:

- **Assert your Weingarten rights.** If you have a legally recognized union in the private sector (even if you don't have a contract yet), you have the right to have a steward present in any meeting that could lead to discipline. (Many public sector unions have similar protections in state law or contracts.)

  So any time you start to feel intimidated, ask your supervisor directly: "Will this meeting lead to discipline?" If she says anything but "no"—including "yes," "maybe," "we'll see," or "I don't know yet"—tell her you want a steward present, as is your right.

- **Take notes on what the supervisor says**, especially if you think she might be violating your rights. (For instance, questions about your organizing could be illegal surveillance of union activity. Consult your union officers or a lawyer.)

  Note-taking during the meeting could make the supervisor nervous enough to rein in her behavior—or it could make her mad enough to escalate. Gauge your particular supervisor. If not during the meeting, be sure to make a written record immediately afterward.

- **Answer questions** related to your work, but don't volunteer extra information you weren't asked.

- **Debrief soon afterwards** with a steward or core group member. This gives the steward a chance to make sure you're okay, find out if your rights were violated, answer any new fears or doubts management has planted, and gather intel on what management's up to.

# Bargaining for the Common Good

For too long we have been on the defensive: Unions have been under attack and the communities they serve have had to cope with painful cuts in essential services. But in the next couple of years, collective bargaining agreements covering over a million public service workers around the country are expiring in communities where more than fifty million people live. We hope you will join community groups and unions who are already working together to transform these future contract negotiations into a broader community fight and to wage common good campaigns outside of bargaining as well.

Unions across the country are expanding their focus to include the broader community.

This idea of "bargaining for the common good"—and working in partnership with local allies—is not a new idea for labor unions, but its potential has never been fully realized, and past efforts have not gone deep enough. One major obstacle has been that recent labor law tries to limit unions to bargaining just over issues of wages and benefits.

But now, partly because of the historic action the Chicago Teachers Union took in 2012, when its members went on strike not just for themselves, but also for increased public services for the broader community, more and more unions have started to reconsider their fundamental roles and responsibilities. By expanding their bargaining demands beyond wages and benefits, unions are recognizing that they can more fully support, and engage their community partners—and get those community groups to support them in return.

In Saint Paul, the teacher's union began to rethink collective bargaining as far back as 2013, convening regular meetings with parents and community members to formulate a shared vision. When the school district refused to negotiate with the union over their community-driven proposals, insisting that teachers could only bargain on matters related to wages and benefits, **the union stood its ground.**

"For too many years we just dealt with the problems we saw from within the walls of our classroom, but now we understand that our contract is the most powerful document we have to improve the learning conditions for our students," says Denise Rodriguez, the current Saint Paul local president, in an interview.

Teachers held "walk-ins," launched social media campaigns, and threatened to go on strike. In the end, teachers won expanded preschool programming, reduced class sizes, reduced testing, and established more equitable access to nurses, librarians, counselors, and social workers. "I had negotiated almost a dozen previous contracts for the [union]," said Mary Cathryn Ricker, the former Saint Paul teachers union president. "But, for the first time, I felt that signing a contract was just one step in building a larger movement."

In the summer of 2015 in Seattle, teachers went on strike for five days— their first strike against the district in 30 years—winning not only cost-of- living increases, but also a guarantee for daily recess for all elementary school students, and the creation of "equity committees" to address the disproportionate discipline of black and brown students.

We ask that you join us in this effort to build a Common Good movement in the years to come. This effort will draw on the coordinated actions of local unions and community organizations joining together and incorporating common demands such as:

- ☐ Complete transparency on all state, county, school district, and municipal financial transactions;
- ☐ Decriminalization of youth in our schools;
- ☐ Claw back provisions that allow governments to recover funds lost to predatory financing;
- ☐ Expanded after school programs;
- ☐ Elimination of tax abatements that failed to produce promised jobs, or privatization contracts that failed to deliver the promised cost-savings;
- ☐ Investment in the creation of quality, affordable housing;
- ☐ Minimum labor standards, which all contractors receiving government contracts must meet, and more.

**A Different Way to Think About Education – Educate the Whole Child**

We know that treating schools as if they were factories turning out workers to compete in the world economy does not work. It fails to connect with what is highest and best in the child. We know that standardization, excessive testing, and narrowing the focus of education to measurable intellectual performance does not work. It leaves out too much of what it means to be a complete, spirited, fulfilled human being. We know from sad experience that No Child Left Behind has driven creative teachers from the profession, which in turn can leave students bored and alienated from the learning process. Recent books by Diane Ravitch, Linda Darling Hammond, and Horace Lucido document this. But what does work?

**The Whole Child Framework is Built Upon These Five Tenets:**

- ☐ Each student enters school *HEALTHY* and learns about and practices a healthy lifestyle.

- ☐ Each student learns in an environment that is physically and emotionally *SAFE* for students and adults.

- ☐ Each student is actively *ENGAGED* in learning and is connected to the school and broader community.

- ☐ Each student has access to personalized learning and is *SUPPORTED* by qualified, caring adults.

- ☐ Each student is *CHALLENGED* academically and prepared for success in college or further study and for employment and participation in a global environment.

**Whole School, Whole Community, Whole Child**

The Whole School, Whole Community, Whole Child Model, developed and released by the US Centers for Disease Control and ASCD, is the next evolution for coordinated school health, and establishes a model for ensuring that students and the school environment are healthy, safe, and supported. Educational Support Professionals (ESPs) play a crucial role in ensuring the success of each school health component.

# Gathering Organizing Data and Metrics

**What will you use to measure your progress, inform required course corrections, and celebrate the success of your organizing campaign?**

| What do you want information about? | What data can you gather that will inform this? | Where can you find this data? |
| --- | --- | --- |
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# SECTION 7
## Community Organizing Tools

# Sample Member Community Organizing Survey

Members of our Local Association are interested in sponsoring various community services. We know that many of our members are already active in the community and may have ideas about how we can work together with other organizations.

Please take a few minutes to answer these questions. By answering them you are not committed to any action; we are just gathering information.

1. To which community organizations do you belong? (PTA, historical, society, church, ethnic club, women's rights groups, etc.)

2. Are you a volunteer for any community organization? Please describe briefly:

3. Do you have any special interest that you would want to share with or teach to other members of our Local or to the community? (For example, sign language, CPR, photography, self-defense, etc.)

4. Are there special topics that you'd be interested in hearing about at a Local meeting? (For example, alcoholism, financial planning, choosing childcare, etc.)

5. Do you have any ideas about ways our Local can work with community organizations you are involved with?

(Please print)

Name: _____

Home address:_____

Telephone: (work) _____(home)_____

(cell) _____

Home email: _____

# Sample Checklist for Potential Community Contacts

*This list suggests possible contacts and is not meant to be an exhaustive list.

**1. Unions**
- — State Federations
- — Central Labor Bodies
- — Individual Unions

**2. Religious Organizations**
- — Individual Clergy
- — State/Local Council of Churches & Synagogues
- — Interfaith Conferences
- — Ministerial Associations

**3. Women's Groups**
- — Coalition of Labor Union Women
- — National Organization of Women
- — Business & Professional Women
- — American Association of University Women

**4. Civil Rights Organizations**
- — Coalition of Black Trade Unionists
- — NAACP
- — Urban League
- — Southern Christian Leadership Conference

**5. Senior Citizens Groups**
- — National Council of Senior Citizens
- — Association Retirees
- — AARP

**6. Advocacy Groups**
- — Consumer Groups
- — Citizen Action
- — Neighborhood Organizations
- — Low-Income Coalitions
- — Environmental Groups

# LIVING WAGE ORGANIZING CAMPAIGN
**MOSCOW, ID**

NAM E_____

**ADDRESS**  _____

**TELEPHONE**_____**CELL** _____

**EMAIL**        _____

**JOB CLASSIFICATION** _____

**YEARS IN THE COMMUNITY** _____

**ORGANIZATIONAL AFFILIATIONS (ie, Book Clubs, Women's Clubs, Brownies, Boy Scouts, Little League, Bowling League, Volunteer work, Sport's Clubs, Extra Curricular Activities, VFW, etc)**

_____

_____

_____

**HOW MANY RELATIVES/GOOD FRIENDS DO YOU HAVE IN THE COMMUNITY AND IN WHAT ORGANIZATIONS DO THEY PARTICIPATE?**

_____

_____

**PLACES OF WORSHIP** _____

_____

**WHAT OTHER CO-WORKERS SHOULD WE TALK TO ABOUT THIS ISSUE?**

_____

_____

**ISSUES/COMMENTS/SKILLS**

_____

_____

_____

**RATINGS**
1) **WILL DO ANYTHING FOR THE ISSUE**
2) **SYMPATHETIC**
3) **FENCE STRADDLER**
4) **OPPOSED**

# SECTION 8

## State and Local
## Campaign Organizing Tools

# Unite. Inspire. *Lead!*

**YOUR LEADER ID**

**FIRST NAME**

**MIDDLE NAME**

**LAST NAME**

/          /
**DOB (MM/DD/YYYY)**

**PERSONAL EMAIL**

(          )          –
**CELL PHONE**

**HOME ADDRESS**

**CITY**

**STATE**

**ZIP CODE**

**CONVERSATIONS HELD:**

**SURVEY  RESPONDENTS:**

**FOLLOW-UPS:**

**MEMBERS SIGNED:**

**NOTES:**

**nea**
NATIONAL
EDUCATION
ASSOCIATION
nea.org

**[Logo placed here]**

**INSTRUCTIONS:** This worksheet can serve as a summary for your back to school recruitment efforts at the worksite or a new employee orientation. For member leaders participating in the New Educator Campaign, please share your personal information in the top section.

The second provides a consolidated space for any follow up work needed. Submit this sheet with any new educator survey cards and membership forms collected. Thank you for your efforts!

# Your Partner. Your Advocate. Your Association.

## *Education Support Professionals*

---

**FIRST NAME**

**MIDDLE NAME**

**LAST NAME**

/ /
**DOB (MM/DD/YYYY)**

**WORK SITE**

**EMPLOYER**

( ) –
**CELL PHONE**

☐ **Get NEA Mobile Alerts**
*Msg & data rates may apply. 4 msgs/month. SMS terms at nea.org/terms.*

**PERSONAL EMAIL**

**HOME ADDRESS**

**CITY**

**STATE**

**ZIP CODE**

**POSITION**
- ☐ Clerical Service
- ☐ Custodial & Maintenance
- ☐ Food Service
- ☐ Health & Student Service
- ☐ Paraeducators
- ☐ Security Services
- ☐ Skilled Trades
- ☐ Technical Service
- ☐ Transportation

**1) How long have you been an education support professional:**
- ☐ First Year
- ☐ 1–5 years
- ☐ 6–10 years
- ☐ 10+ years

**2) I am:**
- ☐ Already a member
- ☐ Joining the Association today
- ☐ I would like more information about membership

**3) What areas of support would be most useful to help you and your students succeed?**
- ☐ Student Behavior
- ☐ Classroom Management
- ☐ Access to mentors and/or coaches
- ☐ Professional Development Programs or Trainings

**4) Which of the following issues are most important to you?**
- ☐ Conditions in the Workplace
- ☐ Social and Racial Justice
- ☐ Parental and Community Engagement
- ☐ Education Policy *(testing, student loans, etc.)*
- ☐ Respect and Recognition
- ☐ Wages and Benefits
- ☐ Meeting the needs of students in poverty

**5) Which of the following tools are most valuable to you?**
- ☐ Student Bullying and Suicide Prevention
- ☐ Degrees Not Debt
- ☐ Child Nutrition
- ☐ Whole Student Education Tools
- ☐ Special Education
- ☐ Privatization/ Outsourcing
- ☐ Communications and Advocacy Training

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*Official Use ONLY:*

*Leader ID*

*Worksite ID*

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**The NEA has additional resources for retired members. Click on www.nea.org/retired for everything NEA offers.**