

Education Support Professional Organizing

TOOLKIT



Clerical Services



Custodial and Maintenance Services



Food Services



Health and Student Services



Higher Education



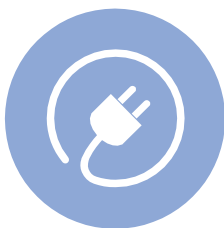
Paraeducators



Security Services



Skilled Trades



Technical Services



Transportation Services

This NEA ESP 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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Sample Member Community Organizing Survey
Sample Checklist for Potential Community Contacts

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

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 ESP 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 with all of your ESP colleagues 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



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 your co-worker isn'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 your co-worker 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 your co-worker really wants 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

Issue Identification Tools

- Checklist for Deciding on an Issue
- A Good Organizing Issue
- Issue Selection
- Evaluate Your Organizing Issue
- Getting the Ball Rolling

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 job family, ESPs 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

Remembering your conversation

It is appropriate—and strongly advised—to make notes immediately after the conversation when the organizer is no longer with the person. Also, it is appropriate to make notes on information a person offers to the organizing campaign, such as names of co-workers, phone numbers, information on the employer, etc.—but first gain permission from the person to do so.

Prior to starting the conversation, a question such as: “Do you mind if I take a few notes as we talk?” will go a long way in building the relationship.

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

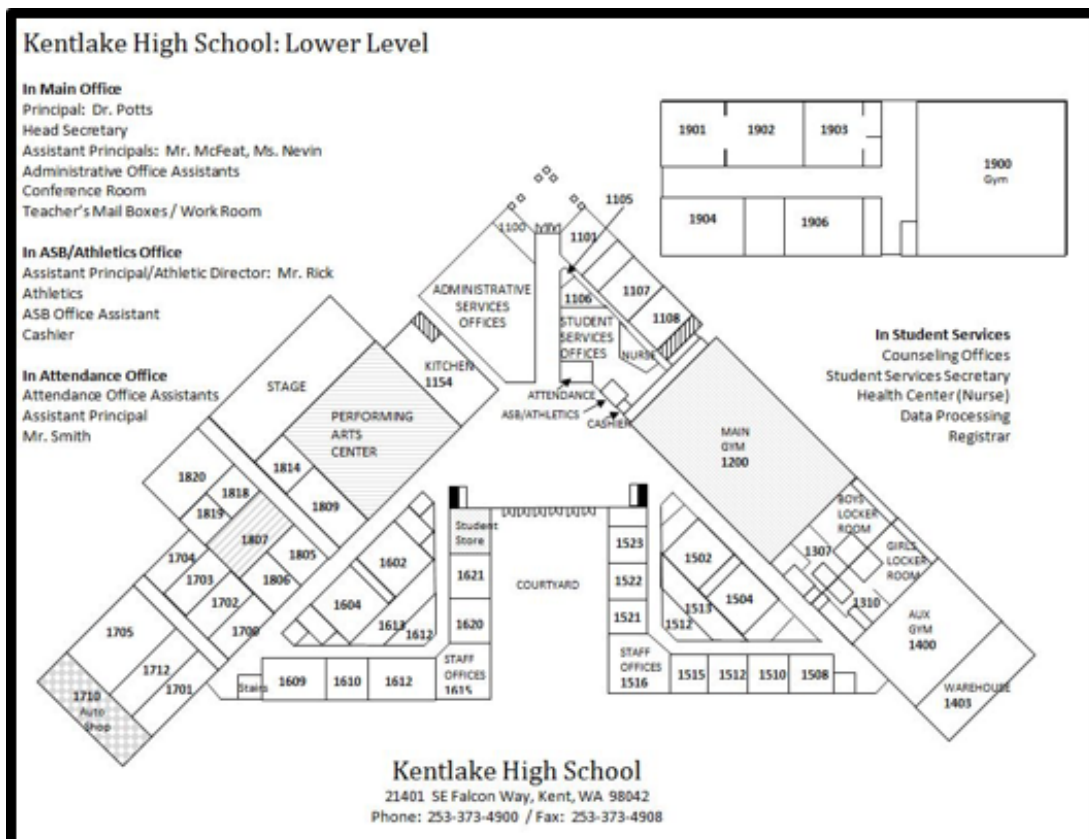
Mapping is a physical depiction of the worksite that illustrates presence and physical proximity of staff by such factors as membership or activist status, age/seniority, job title, assessment status, social relationships, etc.

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.





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 carools 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.



Bargaining—Issue Campaign

Organizing for Bargaining or Organizing for an Issue Campaign Tools

- Sample Contract Survey
- Organizational Readiness Checklist
- To React or Not to React
- Answering Tough Questions
- Practice Answering Tough Questions
- When You're Called into the Office

The outcome of bargaining, or meet and confer, places responsibility for the outcome directly on the membership, not just on the negotiator. The Association's bargaining leverage or contract influence is in direct proportion to the other side's perception of our strength.

Management decides how to respond to negotiators based on whether they believe the membership is involved, and to what extent the membership is prepared to take collective action. Public officials also respond to the level of organization involvement and to whether they will gain or lose politically.

Campaign Budgeting

It's All About the Money!

*It's not enough
to be right, you
also need might.*

BARGAINING/CONTRACT NEGOTIATION: INTERNAL METHODS

STEP 1. Identify the Objective

In a contract campaign, the obvious objective is to win the best contract possible for the membership. Identifying make-or-break contract issues is essential.

STEP 2. Gather Information

1. Survey the membership about contract and/or bargaining goals.

- One-on-one conversations
- NEA surveys
- Pencil and paper
- Online survey templates (such as [surveymonkey.com](https://www.surveymonkey.com))
- Listening tour



2. Research school district's positions and financial capacity.

- Political climate
- Cost data
- Budgets and audits
- Decision-making structure

3. Make comparisons.

- Emerging issues
- Past issues
- Districts/Locals of comparable size and financial situation

STEP 3. Develop an Action Plan

Members should clearly understand that bargaining and/or contract negotiating is being conducted by them, not for them.

1. Select a bargaining/negotiating team.

- Team size
- Diversity
- Constitutional provisions
- Appointed vs. elected
- Criteria for team members
- Responsibility
- Authority

Interest-Based Bargaining: Collaborative

This process encourages the parties to seek and find common interests of proposals, applying neutral standards in an attempt to reconcile their differences and reach common ground.

Traditional Bargaining: Confrontational

This process involves negotiating specific proposals to reach an agreement through the application of pressure, utilizing such techniques as counter-proposals, compromise, and trade-offs.

2. The team should agree on the philosophy about bargaining/contract negotiating.

- Interest based vs. traditional
- Collaborative vs. confrontational
- Single spokesperson vs. group discussion
- Historical impact
- The will of the members

3. Set bargaining goals.

- Establish the difference between goals and priorities
- Short-term objectives
- Long-term objectives
- What are the employer goals?



4. Plan for member involvement in the campaign.

- Consider the impact of bargaining on membership recruitment and retention especially given the many ESP job categories
- Analyze past member involvement: Who? How?

5. Create an issue theme.

- Concepts like "safety in the workplace" mobilize workers more than a "2% wage increase"

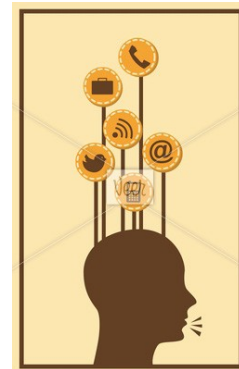
6. Organize support teams—communications, crisis, research, website, newsletter, issues, etc.

- Identify respected workers and volunteers at each worksite to organize/participate in support team activities
- Using one-on-one conversations, the teams survey the membership to identify issues and develop contract proposals

- The support teams ensure that workers know they "own" the issues campaign

7. Plan communication strategies.

- Internal or external
- Written vs. meetings or face-to-face
- Frequency of meetings/messages
- Detailed or general message
- Digital or print
- Social media



BARGAINING/CONTRACT NEGOTIATION:

External Methods

- Bring the community to the contract table—in a time when parents, community, and educators have less and less say in how their schools are run, the Union contract is one place where we can authentically give parents and community members a voice
- Don't define the community in strictly geographical terms. People are drawn together by common interests, not just because they live or work together
- Social media

BARGAINING/CONTRACT NEGOTIATION:

The Media Campaign

- Recruit among the membership the "poster child" members and prepare bios for release
- Train members on how to give interviews and stay on message
- Train members on how to put together a media package, how to write press releases, and how to do follow up after the release to ensure coverage
- Build relationships with the media/reporters months before they receive your first press release
- Use the time to educate them on the issues
- Examples of media tactics: ads in school football/ basketball programs and of newspaper Meet with editorial board
- Strategic press releases
- News conferences
- Free media: public service announcements, letters to the editor, public service airtime on radio or cable TV, radio call-in shows
- Social media

Campaign Planning

Campaign Planning Tools

- Local Association Campaign Planning Guide
- Choose Tactics that Fit
- Arrange Tactics
- Field Experience Toolkit
- Midwest Academy Strategy Chart
- Debrief Questions
- Wisconsin Education Association Council Tactics Manual

While individual organizing campaigns may serve different purposes—such as winning Union recognition and representation rights, increasing Union density by enlisting new members, electing pro-Union candidates to political office, establishing fair and effective accountability and performance standards, or achieving a decent contract—all organizing campaigns have the following common attributes:

- Start with an issue that resonates with members and the individuals and communities we are trying to reach.
- Follow a written plan that clearly states the immediate objective, its rationale, and relationship to achieving a larger long-term goal; how it will be accomplished and the leverage that will be used; a timeline with milestones and benchmarks; what members will be asked to do; and a work plan that specifies who will do what and when.
- Are conducted through a cohesive worksite structure characterized by a ratio approaching 1 trained worksite activist for every 10 unit members.
- Involve members by asking them in person and making participation easy.
- Record, update, and employ data for documenting member participation, measuring progress, and determining next steps.
- Draw from a common set of skills that includes list building, research, the organizing conversation, assessments, charting, mapping, leadership identification and development, and committee building.
- Employ strategies of escalating tactics for applying steadily increasing internal and external leverage to counteract opposition.

A winning strategy requires taking a comprehensive look at every internal and external source of leverage with the potential to affect the outcome of the campaign. Every prospective campaign should be viewed through a set of strategic considerations, such as member and community demographics, employer finances and governance, legal and regulatory environment, community and political power analysis, potential allies and opponents, affiliate readiness, and the role and likely impact of the media. It is an approach that requires research, education, and agitation for organizing and mobilizing our ESP members, potential members, and allies.

Building Power: The Campaign Debrief

Power Tools

- Power Is the Goal
- Building Full Capacity Locals
- Sketch Out a Member Network
- Taking the Conversation Online
- Remember the Basics

During any organizing campaign, “debriefing” your site or home visits or phone calls is vital for continuous improvement and building power. Yet many times we still don’t do it. However, if we don’t take the time to properly review each event, we may miss critical opportunities to identify mistakes and grow.

Here are 3 tips to help you design an excellent debriefing process that can ensure your campaign’s success and help you to continue to grow as you plan for future campaigns.

1. Set the Time(s)

Try to schedule your team debrief at the end of the day, following the site or home visits or phone calls. If this is not possible, try for no later than the next day. Timely debriefs can help detect if there are issues, enabling you to adjust before it’s too late.

The key takeaway? Debriefs are most successful when the details are still fresh in everyone’s mind. The longer you wait, the less you’ll recall and your learning could be severely impacted.

2. Set an Agenda

No one on your team should be asking, “What are we here to talk about?” A good debriefing session is not a directive—it’s a conversation. So make sure your colleagues in the room know what you’ve gathered to talk about. What do they need to prepare? What do they need to bring?

3. Learning, Not Finger Pointing

Always remember, a debrief is not a forum to complain. It is not an opportunity for people to air their dirty laundry and especially not to lay blame.

This is easier said than done, especially if things didn’t turn out very well that day. Emotions can run high and people can become defensive, but this can be a good thing. People get emotional because they care. They’re passionate about the work, have high standards for themselves, and are embarrassed if they perceive things weren’t



successful. Keep the debrief positive and focus on collective learning. Keep it grounded in the concrete details of the campaign...the what, how, and why. Start with the data and then talk about what happened, not who did it. Your path to answering the following questions will be much clearer.

1. What went well? What didn’t? Why?
2. What constraints or barriers did you face? How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the worksite?
7. Were you able to get to everyone given the different ESP schedules and worksites?
8. How can we do better in the future?

Debriefing your events is a critical part of your entire campaign planning process. In fact, it is likely one of the more important aspects of the campaign and one that it often overlooked. By taking part in an active learning process, you’ll be better equipped to lead a successful campaign and continue to build Union power.

Articulating issues or demonstrating proficiency in the basic organizing skills alone no longer guarantees successful outcomes. Employers, “right-to-work” front groups, and political adversaries run comprehensive campaigns that employ sophisticated research, targeted messaging, community outreach, judicial and political intervention, community pressure, and the media to defeat worker power. We should not be any less equipped to carry the fight to them.

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:

- PT/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?

"First they ignore you, then they ridicule you, then they fight you, then you win." ~Mahatma Gandhi

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, it's 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



RESOURCES

SECTION 1

One-on-One Organizing Tools

STORY OF SELF

Our Stories as a Tool for Change

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

EACH OF US HAS A COMPELLING STORY TO TELL

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

PUBLIC NARRATIVE IS A PRACTICE OF LEADERSHIP

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

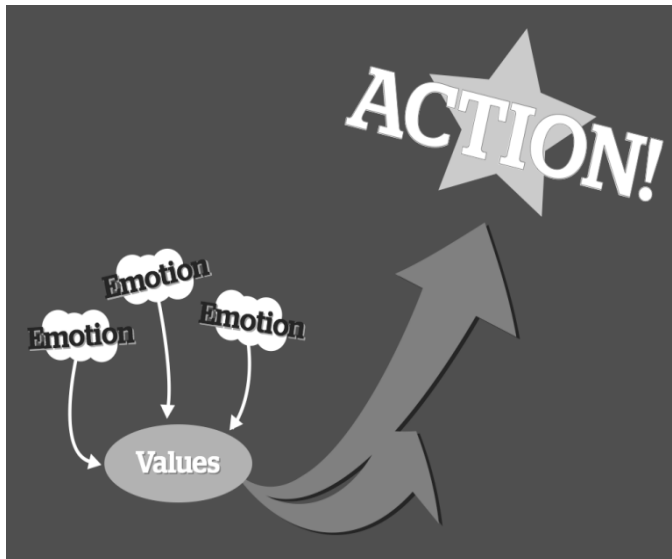
What does public narrative have to do with this definition of leadership? You can't ask others to follow you if they don't understand what your intentions are, and why you are called to lead.

THE HEAD & THE HEART

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



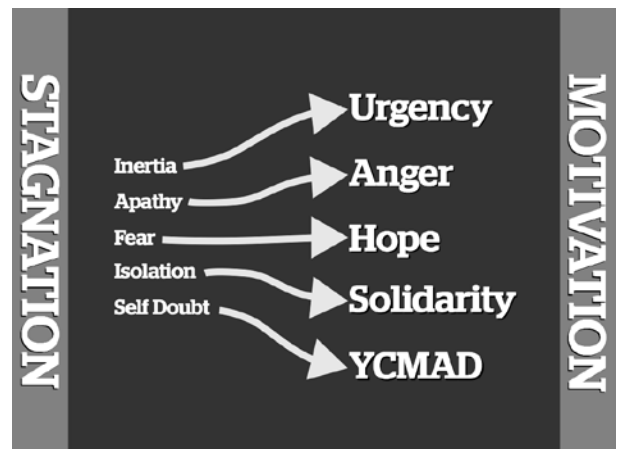
VALUES INSPIRE ACTION THROUGH EMOTION



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

SOME EMOTIONS INHIBIT ACTION, OTHERS MOTIVATE ACTION

Public leaders often encounter individuals or groups where mindful action is inhibited by inertia, 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.



Public Narrative
LEONARD L. BLOOM

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.

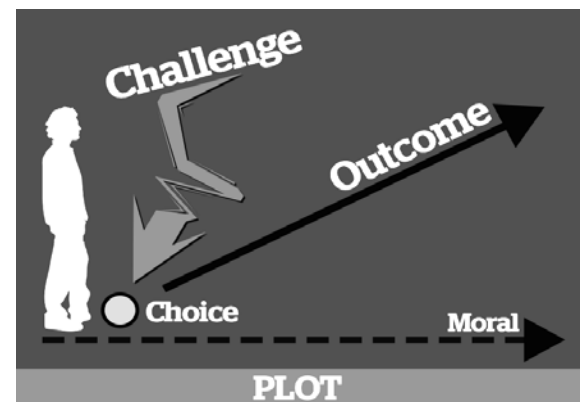
STORY STRUCTURE: CHALLENGE, CHOICE, OUTCOME

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

As told at Powershift 2011: a gathering of 10,000 U.S. climate activists.



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) <u>Fully review these directions before starting</u>	5 min
2.	Take some time as individuals to silently develop your "Story of Self." <ul style="list-style-type: none">Use the worksheet that follows.	10 min
3.	Take some time to review the coaching tips on the page that follows the worksheet <ul style="list-style-type: none">Good coaching questions and feedback from others are key to making your story of self stronger	5 min
4.	Share with your partner. For each person: <ul style="list-style-type: none">Take 3 minutes to tell your storyTake 4.5 minutes to coach your partner<ul style="list-style-type: none">What values did the storyteller convey? How specifically?What is the Challenge, Choice, Outcome in the story? Write them in the boxes on the worksheet that follows.Were there sections of the story that had especially good details or images (sights, sounds, smells, or emotions of the moment)?How did those details make you feel?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:

- What will I be calling on others to do?
- What values move me to take action and might also inspire others to similar action?
- 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 Growing Up Your Community Role Models School	School Career Partner/Family Hobbies/Interests/Talents Faith Overcoming Challenge	First Experience of organizing Connection to key books or people Role Models

Think about the challenge, choice and outcome in your story. The outcome might be what you learned, in addition to what happened. 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 way stories are told and think of ways that the storytelling could be improved.

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

DO coach each other on the following points:

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

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

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

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

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

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

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

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

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

“Your story made me feel _____ because _____.”

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

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

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

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

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...?

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.

PROCESS

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. **DON’T** 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

CHECKLIST FOR OBSERVING RELATIONAL MEETING

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?



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.



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 Open-Ended Questions
3. Making Connections
4. The Ask
5. Thank You and Follow-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.



THEORY OF CHANGE

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



ACKNOWLEDGEMENTS

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

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STRATEGY : THEORY OF CHANGE

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?

Strategy is turning the **resources** you have into the **power** you need, to win the **change** you want

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 what you have into what you need to get what you want**; 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 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

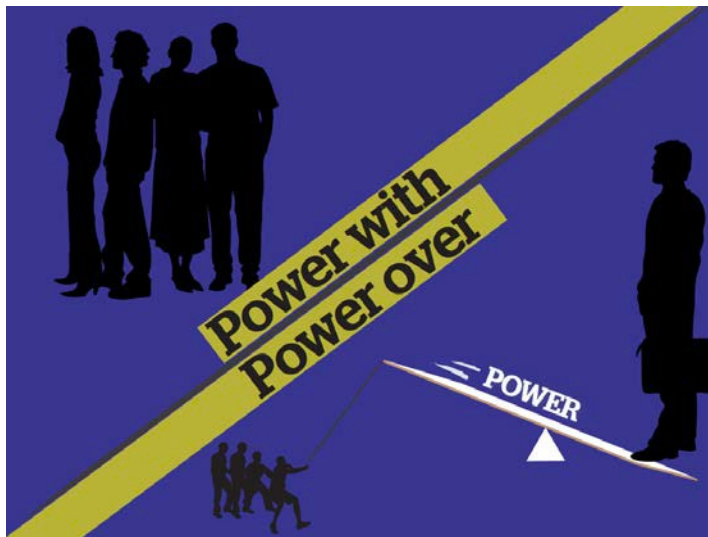
Strategy is about turning the resources we have into the power we need to win the change we want. Think about that for a second. Strategy is simply turning our resources into power and then using that power effectively. **So strategy is empowering—it's based on using what we have effectively, not focusing 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
<p>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?</p>	<p>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?</p>
	

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? 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? 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? 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? 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? 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? 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

→ **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?

→ **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?

→ **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?

→ **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?**

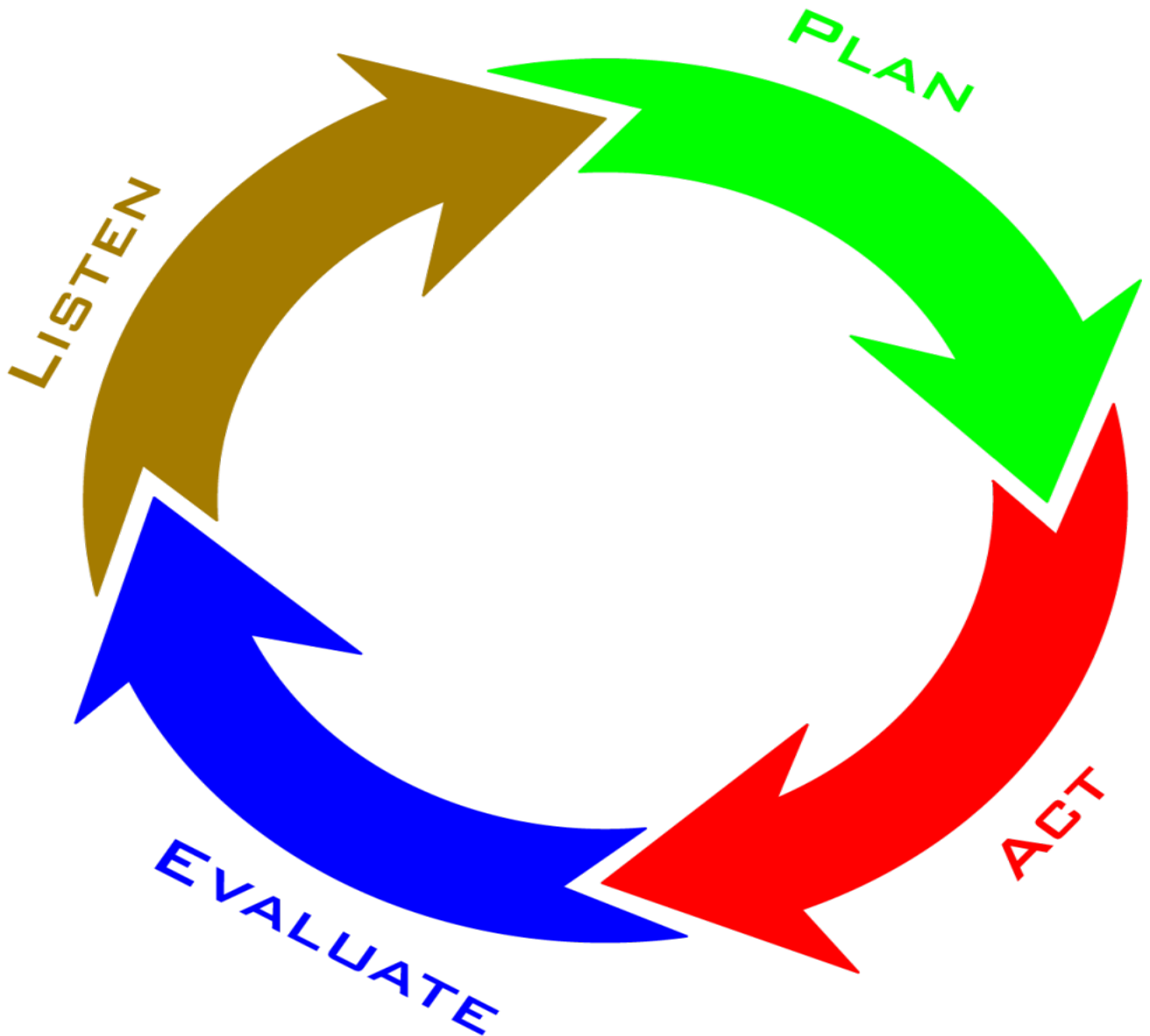
What’s our hypothesis about how to organize our resources to affect our decision makers' interests? What would make the person you identified in Question 2 come to the table to negotiate with you? At what point will they actually FEEL your power? When it looks like they couldn't get re-elected without 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

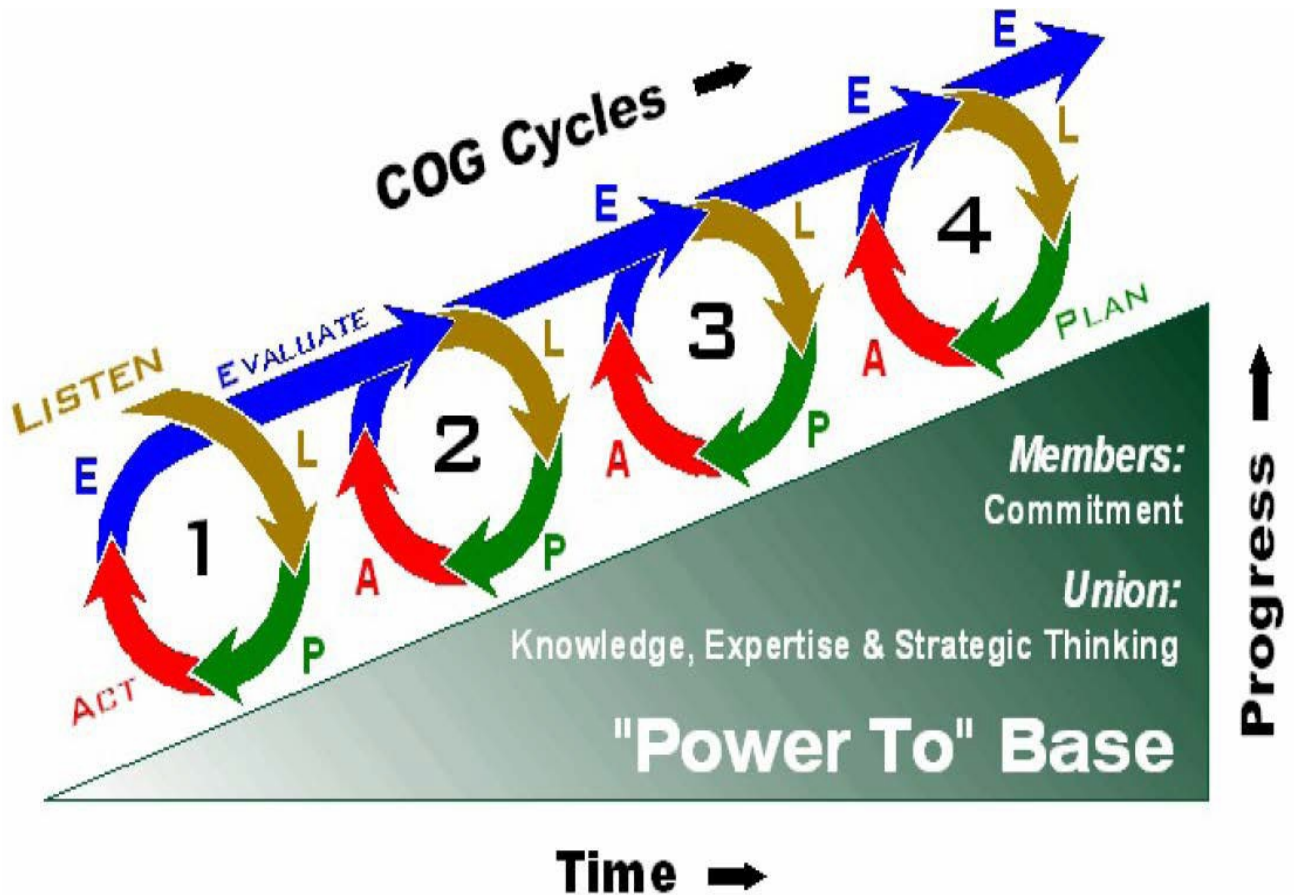
Strategic PLANNING helps in the assessments of the four critical environments (**internal, external, “community” and “legal”**)

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



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.

<i>Issue 1</i>	<i>Issue2</i>	<i>Issue 3</i>	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
			10. 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

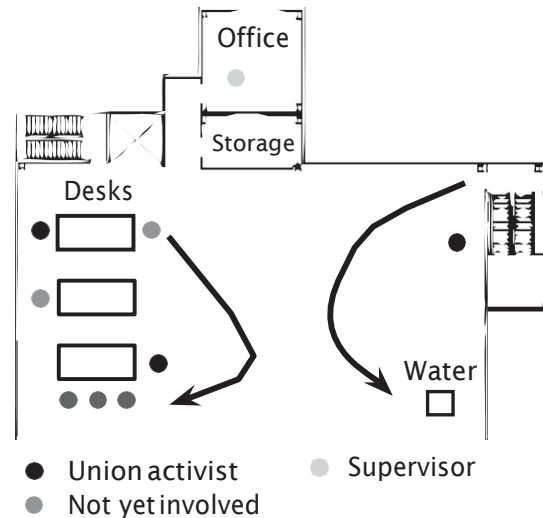
Mapping Tools



EXERCISE: DRAW YOUR OWN WORKPLACE MAP

You will need:

- Butcher paper
- Color markers
- Sticky dots



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. <i>Heather@gmail.com</i> 617-555-1212	Ana E. <i>Ana@aol.com</i> ??
	Jose B. <i>Jose@gmail.com</i> 718-555-1212	Mark F. <i>Mark@aol.com</i> 908-555-1212
Swing	Rose C. <i>Rose@gmail.com</i> 206-555-1212	Charlie G. <i>Charlie@aol.com</i> 434-555-1212
	Brad D. <i>Brad@gmail.com</i> 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 carools 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?



SECTION 4

Organizing for Bargaining
or Organizing for an Issue
Campaign Tools

Sample Contract Survey

This sample survey illustrates some principles about survey design. It certainly doesn't cover all the subject areas a real survey would cover. Obviously, you will have to prepare your own to suit your particular group of workers. How you structure the questions will depend on your plan for analyzing the answers.

What Do You Want to Bargain For?

Local 000 Contract Campaign Survey

Our Local Association has launched our campaign for a new contract.

The first step is to find out what we, the members, want. You can help by returning this survey and by one of the meetings listed below.

As you know, what we win this year will depend on our active involvement as Association members. Our bargaining team is only as strong as the membership standing behind them.

That's why the second page of this survey asks you to check those activities you are willing to help with.

Please return the survey to your contract campaign committee member or the Association office by

Date: _____

Name _____

Job _____

Job Title _____

Full -time? _____ Part-time? _____ Other status _____

Home address _____

Work phone _____ Home phone _____

Cell phone _____ Personal email _____

1. Wages (check only one)

- ☐ Equal dollar increases for everyone. How much? _____
- ☐ Equal percentage increases for everyone. How much? _____
- ☐ A percentage raise with a minimum or floor (example: 5% or \$100 per month, whichever is greater) What percentage? What minimum? _____

2. Time Off (check only one)

- ☐ Not a priority
- ☐ More sick leave How much? _____
- ☐ More vacation How much? _____
- ☐ More holidays? When? _____

3. Scheduling (Check no more than two)

- ☐ Not a priority
- ☐ Eliminate mandatory overtime
- ☐ Eliminate rotating shifts
- ☐ Increase required notice for overtime from one day to _____
- ☐ Standardize starting and quitting times
- ☐ Negotiate optional 4 day/10 hr. schedules where feasible
- ☐ Negotiate a voluntary reduced hours option
- ☐ More worker choice in starting and quitting times

4. Priorities

The major issue areas are listed below. Mark 1 next to the most important to you, 2 next to the second most important, and so on.

- _____ Wages
- _____ Health Benefits
- _____ Retirement Benefits
- _____ Scheduling
- _____ Contract Length
- _____ Health and Safety Rights
- _____ Career Ladders/Training Opportunities
- _____ Job Security

5. Other Concerns

Use the space below to describe any other job-related problems that you think should be dealt with in contract negotiations. Possible subjects might include inequities or discrimination, workers' rights, health and safety, workloads, job classifications, promotional opportunities, grievances, or other working conditions. If you have ideas for possible solutions, be as specific as you can. Use additional sheets of paper if necessary.

What We Win Depends on You

The Association can't win a good contract for us, because ***we are the Association.***

Now that you've thought about priorities for bargaining, please indicate which responsibilities you can take on to help build our negotiating strength. Your contract campaign committee will be contacting you with more details.

- _____ Serve on contract campaign committee (coordinates bargaining support activities)
- _____ Distribute leaflets when needed to my co-workers
- _____ Be part of a phone tree to contact 5 other workers when our representatives need to get a message out quickly
- _____ Attend rallies or special events to show we support our negotiators
- _____ Be trained to speak to community groups about our proposals
- _____ Help with research to develop and support our bargaining proposals
- _____ Other ways you can help (please explain)
- _____ Social Media _____

Organizational Readiness Checklist

This organizing and bargaining checklist is intended to help the local Association as it prepares for bargaining and develops strength through organizing. It may be adapted to fit local circumstances. Some items, even if initially completed, may require ongoing adjustment and revision.

If the local is planning to request WEA crisis assistance and funding, a copy of the completed assessment should be forwarded to the Advocacy and Organizing Center, Attn: Mike McNett.

The checklist is designed to ensure that each local is adequately prepared in the following key areas.

- A regular communications program that listens to members about their needs and goals, engages them as active participants, and keeps them informed throughout the process;
- A knowledgeable, well-trained bargaining team;
- A structure, including a Bargaining Support Team, to build and channel the power of members and Association allies in the broader community through organizing.
- To accept, in a pre-crisis or crisis situation, professional staff support to advise and work with local leaders, which will entail changes in leaders' and bargaining team members' roles, responsibilities and decision-making

Yes	In-Process	No	Bargaining Issues
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Bargaining team has attended training.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Bargaining team roles have been clearly assigned.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. UniServ staff is involved in the bargain and is familiar with the proposals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Association is communicating regularly with a coordinated bargaining cluster, has made proposals consistent with the goals of the CBC, and is engaged in disciplined pattern bargaining.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Bargaining blueprint or comparable plan has been completed.

Yes	In-Process	No	Research
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. The school district monthly budget status reports have been examined.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. A detailed analysis of the school district budget has been completed.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. A group of comparable districts has been developed.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Relevant language in the comparable contracts has been compiled.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. Association leaders are familiar with processes in their constitution and bylaws regarding calling and announcing membership meetings and conducting strike and ratification votes.

Yes	In-Process	No	Assessments of Members
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. Membership has been surveyed (through one-on-ones, focus groups and/or bargaining survey) to determine bargaining issues.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. Survey results have been communicated to the membership.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. The bargaining team has done a follow-up survey on the bargaining issues, if needed.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. Further issue assessments have been done by worksite.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. Contact has been made with special interest groups within the Association in an effort to solicit their support.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16. Members at each worksite have been talked with or surveyed to determine member readiness to participate in various tactics. If yes, attach results by worksite.

Yes	In-Process	No	Organizing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17. UniServ staff is involved with the organizing.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18. An organizing/bargaining support team has been established and is meeting.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	19. Association has established a bargaining/organizing timeline that applies the necessary negotiations and expression of power to gain a settlement within a reasonable time frame.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20. The person or persons making bargaining decisions on behalf of the employer has/have been identified and researched.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21. A series of escalating actions has been designed to influence the district's decision-maker(s) to agree to a favorable settlement.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22. Individuals who can strongly influence the district's decision-maker(s) have been identified.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23. June general membership meeting is scheduled or has taken place.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24. August general membership meeting is set and has been communicated to the membership.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25. Contact list for new hires is complete.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26. New hires have been contacted by the local.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27. District information is complete from strike manual: superintendent information, school board information, district bargainer information, etc.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28. List of other district employee unions and leadership is completed (home phone, cell phone, e-mail, etc.).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29. School district and work site maps are on file.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30. Worksite organizers (could be building reps) have been identified and trained.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31. A member skill and talent list has been compiled.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	32. Membership has participated in some form of organizing activity (sign building, leafleting, phone calling, etc.).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33. A power analysis of the district and community has been completed.

Yes	In-Process	No	Organizing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	34. Allies have been identified in the community, including groups and individuals. <ul style="list-style-type: none"> The local has identified members with established contacts with these potential allies. Initial contact has been made with the allies to discuss how their interests intersect with those of the union.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	35. Members and parents who can be named in affidavits have been identified.

Yes	In-Process	No	Association Resources/Budget
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	36. Money is available in the Association budget for tactics, organizing, and pre-crisis pressure. How much? \$_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	37. Attach local Association budget.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38. Determine from bylaws the procedure for making expenditures, and be prepared to expedite this process and manage required timelines.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	39. Review WEA Crisis Funding Policy application process (in Strike Manual) and be prepared to enter into the agreement. The funding policy requires local matching funds and potential changes in the decision-making structure.

Yes	In-Process	No	Communications
INTERNAL			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	40. Issues have been framed and bargaining unit members are well informed about negotiation issues.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41. The "message" has been developed for use in communications and organizing.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	42. Information about bargaining is disseminated regularly via newsletter or email, both after each bargaining session and at predetermined strategic intervals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	43. Member list, by building, has been completed (home phone, cell phone, home e-mail, summer addresses, etc.).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	44. The local has a system in place by which to send email to each member's home email address.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	45. Expectations and method for effective summer communications established.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46. Social media tools your local will use for the bargain analyzed and established. <ul style="list-style-type: none"> Facebook Twitter Texting system Website Blog
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	47. The Local's website and/or blog and Facebook pages have been updated to include a persuasive portrayal of the union's position and message. Trusted individuals are designated to post regular updates.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	48. The school district's financial condition has been communicated to Association members. Describe when and how.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	49. Organizing/information meetings have been held regularly with building reps and/or organizing/bargaining team members.

Yes	In- Process	No	Communications
-----	----------------	----	----------------

INTERNAL

☐ ☐ ☐ 50. Bargaining team members and/or Association officers have made building visits.

☐ ☐ ☐ 51. A cell phone tree is established for each worksite or zone and has been tested.

Yes	In- Process	No	Communications
-----	----------------	----	----------------

EXTERNAL

☐ ☐ ☐ 52. An email list for community mailings has been compiled.

☐ ☐ ☐ 53. A community communications plan has been developed using the Association's message and appealing to the self-interest of the public.

☐ ☐ ☐ 54. A media contact list for Association communications has been prepared.

☐ ☐ ☐ 55. Members of the media have been contacted and briefed on bargaining issues.

☐ ☐ ☐ 56. Association news media fact sheet complete.



TO REACT, OR NOT TO REACT?

If management puts out a “fact sheet” filled with lies, how should you respond? It can be tempting to thoroughly refute every point, but you should stop and think before going down that rabbit hole.

Management is trying to distract and confuse. If derailing works, they’ll keep it up, supplying more lies as quickly as you can debunk them. When you’re on the defensive, you are—for the moment—losing.

Avoid dignifying an attack with a written response. Co-workers may be looking to you for cues on whether to take it seriously. You want to keep the focus on your issues, not their attacks.

So when should you react? Essentially, when you have to. If management is successfully changing the subject, then you may need to respond to what they’re saying, in your flyers and conversations. The goal is to put out the fire and bring the focus back to your issues.

Remember, your campaign won’t be won with dueling flyers, but with one-on-one conversations through the communication network you’ve been building. Management has enough money and personnel to out-flyer you, but you’re the ones who are trusted shop floor leaders.

Do not respond to the boss’s message just because:

- It’s infuriating.
- It’s a lie.

Do respond if:

- It’s getting traction—people you care about are talking about it.
- It’s closing people off to your message.



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?

[illegible]

SECTION 5

Campaign Planning Tools

Local Association Membership Campaign Planning Guide

Use this template to assist your local association plan and lay out your membership campaign strategies and tactics. Your membership plan should take the form of a written document listing a range of elements and how each element will be developed and communicated. This template is offered to give you guidance but does not require you to follow this suggested format or sequence. When using this template, we suggest that it be a participatory process among leaders and other stakeholders in your local association in order to maximize involvement of your activists and rank and file members. This is a work in progress and we welcome your feedback in order to make this template more beneficial for local associations.

Background and History of Local Association

Give a brief history of your local association. Include information on leadership, involvement among members, relationships with key stakeholders, successes and accomplishments your local association has seen as well as failures and losses. Also list any membership growth or loss your local has seen in the last 10 years.

Local Association Situational Analysis and Assessment

Discuss the current situation your local association is in. What political, economic/financial, cultural, or other factors are creating challenges or opportunities for your local association and members? What problem is your local association faced with currently and what problems do you foresee in the next year? Identify both internal and external strengths and weaknesses your local association has.

Message and Issues to Organize Around

List potential issues you might be able to use throughout the year-round campaign that will be universal to both members and potential members. Present prospective messages that might work to generate urgency among both internal and external audiences. Remember, messages often need to be tailored to fit differing populations.

Year-round Membership Campaign Objectives and Goals

Develop the goals and/or strategies for your year-round membership campaign. You should include more than just being on the winning side of an issue. Your local should look to build capacity with every campaign. It should also look to frame the campaign issues to better ensure you can deliver on the local's agenda in future campaigns. What specific and tangible outcomes do you aim to achieve? List out what kind of benchmarks your local will use to determine success. Your objectives should be strategic, measurable, achievable, realistic, and time specific. Your objectives and goals should be both qualitative and quantitative.

Qualitative: *Will you provide engagement opportunities for current members? Will you provide training/or leaders and members on issue organizing at the site level? Will you try to build a foundational infrastructure at worksites? Will you begin to identify the "next generation" of leaders for your local? Will you build better relationships with community groups or the district?*

Quantitative: *How many new members would your local like to recruit? How many new activists would you like your local to identify? How many quality contacts/conversations will your local have with potential members? How many leaders will you identify?*

Campaign Phases and Timeline

Consider the different phases your local goes through each year: back to school, fall in building recruitment, winter, spring early enrollment, summer break, etc. Plan out the key dates including internal and external events and activities, milestones, kickoff or trigger events. These are all dates that your local deems important and then you build your campaign around this calendar. In this, you should consider who is responsible for each activity and what resources your local might need to be successful. Don't forget to schedule time for debriefs after each phase and then a final debrief at the end of your year-round campaign.

Campaign Organization Structure

Who will be involved in the year-round membership campaign and what will their roles and responsibilities be? Who are the key players? Campaigns involve key decision makers, opponents, and allies. State what role your local leaders will play? How will your Association Representatives be involved? Do you have a membership committee and what will their responsibilities be? What will be the role of the president? What will be the role of the local UniServ staff person? In order to effectively implement your plan, you will need activists and volunteers. Don't forget to include your strategies for recruiting and retaining activists and volunteers.

Campaign Strategies and Elements in each Campaign Phase

Here, outline what strategies you will permit in your campaign. How will you identify and train ARs and recruiters to engage in your member to member campaign? How will you target specific building or sites in your district? What demographic of potential members will you target (e.g. 0-5 year teachers, transportation workers, etc). How will you collect and obtain personal data from both members and potential members? How will you engage members in your campaign? What is your plan to use the data generated from this campaign/or future actions? How will you get your message out to all those needing to see it?

Strategy to Collect Data

What will be your strategy to collect data on number of quality contacts, number of new members, number of engagements, number of commitment cards, number of new activists, and other information necessary?

Budget

List out what each action and activity might cost. This can include funds for release time for leaders, production of materials to be used in campaign, or incentive programs for involving others in the campaign. Be creative in what you want to do knowing that there are limited financial resources. Include any budget requests you have from NEA and state association. Also list out what financial commitment your local association has put aside for this campaign.

Follow up Plan

Think about where you want your local association to be when this campaign concludes. What will be your plan to continue to be relevant to both members and potential members then?



CHECKLIST: CHOOSE TACTICS THAT FIT

- Does the action relate to your issue?
- Will it increase the pressure on the decision-maker?
- Is it simple?
- Is it visible?
- Is it timed for effect?
- Is it new and different—or tried and true?
- Are enough people ready to do it?
- How will others react?
- Will it unify people?
- How will management react?
- Could it backfire?
- Does it violate the law or the contract?
- If so, are you prepared for the consequences?
- Will it be fun?



EXERCISE: ARRANGE THESE TACTICS ON A THERMOMETER

Here's an assortment of tactics that workers have used and loved. Pick an issue in your workplace and imagine you're planning an escalating campaign. Use the blank thermometer (next page), and write in the tactics you might use, beginning at the bottom with the mildest ones.

Which tactics are "hotter" might vary from one workplace to another, and some tactics will be unique to a particular workplace. Can you think of actions you might try that aren't on this list? Place these on your thermometer, too.

- Bombard the boss with phone calls and emails
- Put up posters
- Wear T-shirts or hats with a slogan or cartoon on a particular day
- Visit the boss in a small group
- Strike
- Wear buttons or stickers
- Distribute leaflets
- File a group grievance with signatures
- Hold an informational picket line
- Rally in the parking lot and enter the building at the same time
- Circulate a petition
- Set up a Facebook page for your campaign
- Write and sing a song about the boss
- Barrage management with tweets and Facebook comments
- Invite a giant inflatable rat to sit outside the workplace
- Do a survey
- Meet with outside supporters; get them to take action, too
- Visit the boss in a large group
- All take breaks at the same time
- Spill the beans to the media
- Call the boss out in front of other workers
- Everyone gets "sick" on the same day
- Work to rule
- Make up wallet cards that define workers' rights
- Do a skit or other creative action at a picket line, shareholders' meeting, or public place
- Rally at district headquarters or another target
- Stop working overtime, all together





Field Experience Organizing Toolkit

Context/Overview

This toolkit is a resource to use when conducting a field organizing experience. A field organizing experience brings staff, leaders, and members together for relational, issue-based organizing. .

We recommend the following goals for field organizing experiences:

1. Identify issues and concerns at the work site level
2. Membership recruitment, retention, and engagement
3. Leadership team building at worksite level through identification of "natural" leaders
4. Identification of activists or mobilization of members
5. Identification and development of members organizing and leadership skills and abilities

Example Timeline

Months Prior to the Field Organizing Experience

Make a plan --- Begin making your organizing plan and set both qualitative and quantitative goals for this effort. Field Organizing Experiences are most effective when executed in the context of a current organizing campaign. A detailed plan includes: compelling issue(s), goals, timeline, budget, training, benchmarks, and an implementation team.

6 – 8 weeks prior to the experience

Secure data/lists --- At this point you'll also want to start thinking about ways to secure data and lists about your members or potential members. Some locals are able to work with the district to request full staffing lists, others have to work to pull staff lists from individual school websites. In general the more information there is on a given list the better. Information such as phone number, email, zip code, and address are ideal. However, information such as first name, last name, middle initial/name, and worksite can also be helpful. The higher the quality of the data the more useful it'll be during the experience. If you have questions about data, contact your state affiliate.

4 weeks prior to the experience

Build your team – A successful field experience requires a team of people working together with clear roles and responsibilities. Work with your team to figure out things like: who will schedule the visits, who will prepare the materials, who will communicate with leaders/activists, etc.

Prepare members for being released from duties in order to participate. This can include union release time, requesting substitutes, etc. depending on your contractual rights.

2 weeks prior to the experience

Prepare the experience's schedule – The schedule should outline general dates, times, and locations important to the blitz. It is always necessary to hold an orientation for participants at the beginning of the

field experience. Other important activities to schedule include daily briefings, any training components, and times to report back to your central location for the daily debrief. You should also create space for celebrating and sharing of learnings throughout the time together for the field experience.

1 week prior to the experience

Create your field teams and make assignments --- Create field teams of based on size of list, size of worksite, diversity, strengths of team members, and other local considerations. Print out your lists and assign work sites, phone calls, or home visits for each team. As you assign lists, prioritize lists that are most in need of a organizing work.

Put together packets for field teams--- Double check that your packets have everything that you need to meet your objectives. Do you have membership forms? An engagement piece such as a petition? Lists? A local flyer about your priorities and successes for the year? Talking points for the field teams about key issues?

The following Pages Provide Example Materials and Resources

Example: 1 on 1 Conversation Notes Sheet

Person's Name: _____

Work Site: _____

Position/Grade Level: _____

Person's Home Email: _____

1. Get to know them: Abilities, Skills or Talents:

2. Finding their issue(s): If you could change one thing about the district/your classroom what would it be? How does that affect you? Your family? Your students? How does that make you feel? Have you tried changing it?

3. Finding solutions to issues and challenges. What is the member willing to do?

4. Leader ID: Who are some other trusted and respected colleagues that would be good to talk to? Why?

5. Other information we should know:

Conversation assessment:

1 – Supportive Member Leader w/ Followers

2 – Supportive Member

3 – Persuadable Non-Member

4 – Unsupportive Non-Member

Your Name: _____

Date: _____

MEMBER CONVERSATION TRACKING SHEET

(FILL OUT IMMEDIATELY AFTER CONVERSATION)

Member/Potential Member Name: _____ Position/Subject: _____

Work site: _____ Years at this school: _____ Years In district: _____

Top 3 issues:

- 1.
- 2.
- 3.

Who would you say are some of the most trusted and respected staff at your work site? Who do you go to for guidance? Why?

(Aim for 2---4):

- 1.
- 2.
- 3.
- 4.

Any additional notes (optional):

Follow-up Needed:

Organizer Name: _____ Date: _____

Site Visit Report Form

Work Site: _____

Date: _____

Visit Time: _____

Building Rep(s): _____

Ease of access and receptivity at this site: (choose one):

☐ Very welcoming ☐ somewhat welcoming ☐ Difficult

	# of Certified	# of Classified	Total
Quality Contacts --- Members			
Quality Contacts – Potential Members			
Membership Forms Completed			
Commitment Cards (Or additional action)			

Potential Leaders Identified:

Name	Assessment	Notes

Potential Members for Follow-up:

Name	Job (grade, department or classification)	Notes

Submitted by: _____

Please put additional notes from visit on back of work sheet.

Home Visit Daily Report Form

Field Experience Team: _____ Turf: _____

Please tally these numbers:

Homes Visited:	Contacts:	Assessments: 1's--- 2's--- 3's--- 4's---
----------------	-----------	--

What quality contacts did you make?

Name	Local, School, Position	Assessment	Notes (included action taken)

What else should we know from your visits?

Sample Member Commitment Card

THIS SCHOOL YEAR, I PLEDGE TO SUPPORT
GREAT PUBLIC SCHOOLS BY:

- | | |
|--|--|
| <input type="checkbox"/> Serving as an Association Representative at my worksite | <input type="checkbox"/> Engaging in a community service event |
| <input type="checkbox"/> Attending a school board meeting | <input type="checkbox"/> Registering to become an Education Cyber-Lobbyist on state and national legislation |
| <input type="checkbox"/> Helping coordinate a professional development activity | <input type="checkbox"/> Joining an Association Committee |
| <input type="checkbox"/> Participating in outreach efforts by contacting members | <input type="checkbox"/> Assisting with planning events |
| <input type="checkbox"/> Belonging to my professional Association | <input type="checkbox"/> Other: _____

_____ |

NAME:

SCHOOL/WORKSITE:

HOME ADDRESS:

CITY/STATE/ZIP:

HOME PHONE:

CELL PHONE:

PERSONAL EMAIL:

Sample Field Experience Schedule

Sunday, 7/26	Monday, 7/27	Tuesday, 7/28	Wednesday, 7/29	Thursday, 7/30	Friday, 7/31
<p>1PM – Participants arrive. Training begins: Campaign briefing, review week’s schedule review, and conversation role-plays, etc.)</p> <p>6PM – Training concludes. Teams given assignments for tomorrow</p> <p>7PM – Group dinner</p>	<p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p>	<p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p>	<p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p>	<p>8AM – Elementary School Site Visits</p> <p>1PM – Middle/High School Site Visits</p> <p>3PM – Daily Debrief</p> <p>5PM – Phone Calls or House Visits</p> <p>8PM – Phone Calls or House Visits Conclude</p> <p>(All meals self scheduled)</p> <p>(Depart Thursday night if possible)</p>	<p>8AM – Elementary School Site Visits</p> <p>1PM – Final Debrief</p> <p>2PM – Group Photo</p> <p>(Depart Friday afternoon)</p>

Checklist and Questions for a Successful Field Experience

Checklist:

- ___ The Local Association is on board
- ___ The State Association is on board, if applicable
- ___ The dates are confirmed with all stakeholders
- ___ There is a team of individuals from the local responsible for the overall success of the field experience
- ___ The experience will help launch or build on an organizing campaign
- ___ The local's organizing campaign has a compelling issue and message
- ___ Local staff, leadership, and membership will participate in the experience
- ___ There is a training plan for teams on organizing conversations, key local issues and collecting data
- ___ The experience will further identify and develop the local association's worksite leadership
- ___ We've secured the lists and data needed for members and potential members
- ___ That data has been uploaded into the VAN or other data tracking tool when and where needed
- ___ We've secured access to worksites at appropriate dates and times, if applicable
- ___ We have discussed and secured agreement to include home visits or phone calls, if applicable
- ___ We have a means to keep track of key metrics (conversations, issues, members engaged, members recruited, leaders identified, etc) per visit so they can be reported daily and entered back into the VAN or other data tracking tool

- _____ We have created a “to do” list for the experience: for example, gather school or worksite rosters and schedules, building maps, schedules for staff and room assignments; arrange for substitutes, pair teams, and print worksite rosters including list of association reps at each worksite and template for reporting conversations
- _____ We have determined transportation to worksites and reimbursement for use of personal vehicles
- _____ We’ve developed a follow up plan at the local level that ensures that the effort of this experience will translate into long-term power building for the local affiliate

Questions to consider:

Participants

Who will be participating in this experience from the local and state affiliate, if applicable?

Will local leadership participate in teams going out into the field or making phone calls?

Does the local have current activists and/or work site leaders that will be part of the experience?

How many members, UniServ staff and leaders will be needed?

Who is prepping the materials (i.e. conversation note sheets, worksite visit debrief sheets, snacks, flyers, etc.)? Who is training teams?

What specific skills will participants gain or further develop in this field experience?

Data

What is the data capacity of the local? Do they regularly use the VAN or other data tracking tools?

Who will prepare the lists/data for phone calls, home visits or worksite? Who will enter the daily data from the experience into the VAN or other data tracking programs?

What training/support on data collection and reporting does the local need prior to the experience?

Follow Up

What critical information and data will be collected in order to execute a follow-up campaign (i.e. tracking potential leaders, engaging new members, key issues, etc.)?

How will the local assess the data? How will the follow up plan be implemented? Who will be responsible

MIDWEST ACADEMY STRATEGY CHART

Goals	Organizational Considerations	Constituents, Allies/Opponents	Targets	Tactics
<p>1. List the long-term objectives of your campaign.</p> <p>2. State the intermediate goals for the issue campaign. What constitutes a victory? How long will the campaign:</p> <ul style="list-style-type: none"> • Win concrete improvements in people's lives? • Give people a sense of their own power? • Alter the relations of power? <p>3. What short-term or partial victories can you win as steps toward your long-term goal?</p>	<p>1. List the resources that your organization brings to the campaign. Include: money, number of staff, facilities, reputation, etc.</p> <ul style="list-style-type: none"> • What is the budget, including in-kind contributions, for this campaign? <p>2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in the numbers for each:</p> <ul style="list-style-type: none"> • Expand leadership groups. • Increase experience of existing leadership. • Build a membership base. • Expand into new constituencies. • Raise more money. <p>3. List internal problems that have to be considered if the campaign is to succeed.</p>	<p>1. Who cares about the issues enough to join in or help the organization?</p> <ul style="list-style-type: none"> • Whose problem is it? • What do they gain if they win? • What risks are they taking? • What power do they have over the target? • Into what group are they organized? <p>2. Who are your opponents?</p> <ul style="list-style-type: none"> • What will your victory cost them? • What will they do/spend to oppose you? • How strong are they? 	<p>1. Primary targets</p> <p>A primary target is always a person. It is never an institution or elected body.</p> <ul style="list-style-type: none"> • Who has the power to give you what you want? • What power do you have over them? <p>2. Secondary targets</p> <ul style="list-style-type: none"> • Who has the power over the people with the power to give you what you want? • What power do you have over them? 	<p>1. For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p>Tactics must be:</p> <ul style="list-style-type: none"> • In context. • Flexible and creative. • Directed at a specific target. • Make sense to the membership. • Be backed up by a specific form of power. <p>Tactics include:</p> <ul style="list-style-type: none"> • Media events. • Actions for information and demands. • Public hearings. • Strikes. • Voter registration and voter education. • Lawsuits. • Accountability sessions. • Elections. • Negotiations .

The Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituency People Power	Decision Maker (Target)	Tactics
<p><i>Goals are always won from someone!</i></p> <p><u>Long Term</u></p> <p>What you really want. Pass HR 5, \$\$\$ for School Lunch</p> <p><u>Intermediate</u></p> <p>Get Rep. Lux to vote YES on HR 5</p> <p><u>Short Term</u></p> <p>Get Rep. Lux to hold a hearing in our community</p> <p><i>Goals are always concrete improvements in people's lives!</i></p>	<p><u>What resources can you put in?</u></p> <ul style="list-style-type: none"> • Members? • Leaders? • Staff? • Time? • Money? <p><i>Be Specific!</i></p> <p><u>How will you build the organization?</u></p> <ul style="list-style-type: none"> • Coalition partners • Money to raise. • New Leaders. • Visibility <p><i>How much? How many? Be specific!</i></p> <p><u>Internal problems in the way?</u></p> <ul style="list-style-type: none"> • How to solve. 	<p>Constituents (potential members)</p> <p>Allies (with you but not eligible to be a member)</p> <p>Who cares about the problem?</p> <p>How are they organized?</p> <p>What power do they have over the target?</p> <p><i>How many? Be specific!</i></p> <p><u>Opponents?</u></p> <p>Can you neutralize any opponents?</p>	<p><u>The person who has the power to give you what you want!</u></p> <p><i>Always a person with a name, not an institution!</i></p> <p><u>Secondary Target</u></p> <p>Someone over whom you have power, who has power over the Decision Maker (not used in most campaigns)</p>	<p><u>What you will do to the decision-maker to make him/her give you the goals.</u></p> <ul style="list-style-type: none"> • Letter writing • Petitions • Coordinated phone calling • Public Hearings • Group Visits to Decision Makers • Media Events • Rallies • Actions • Accountability sessions • Etc, etc.

The Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituency	Decision Maker (Target)	Tactics
<u>Long Term</u>	<u>What resources can you put in?</u>	<u>Who cares about the issue?</u>	<u>The person who has the power to give you what you want!</u>	<u>What you will do to make the decision-maker give you what you want.</u>
<u>Intermediate</u>	<u>How will you build the organization?</u>			
<u>Short Term</u>	<u>Internal problems in the way?</u>	<u>Opponents?</u>	<u>Secondary Target</u> (not always necessary!)	

The Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituents & Allies	Target	Tactics

Creating a Strategy Chart

Goals/Purpose

Through this lesson the group will map out a strategy for winning your issue. Another way of saying it is that they will map out their campaign. This campaign roadmap will help them to decide what steps to take and when, and it will be a guide for the group as they move forward.

Objectives

- Members will define and identify the targets, allies, constituents, opponents, tactics and goals of their campaign
- Members will identify the resources they need to conduct their campaign
- Members will identify the first steps in their campaign
- Members will have a document that can be used as a guide throughout the campaign

Total Time: One and a half hours

Agenda/Activities

Introductions/Icebreaker
What is strategy?
Strategy Words
Strategy Chart Exercise
Closing



Facilitator Preparation

Make large poster of a blank strategy chart (included in Toolkit)

Materials Needed

Large newsprint
Markers
Masking Tape

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Tools

Strategy chart handouts

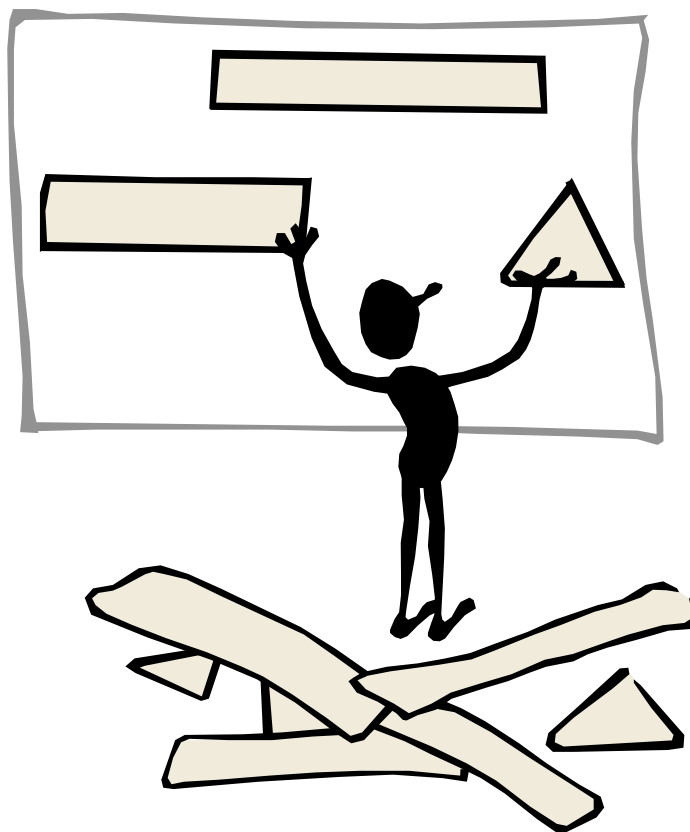
- strategy chart guide
- sample strategy chart
- blank strategy chart (to use as a template)

The Basics

The strategy chart is a roadmap for your group to win the issue it has selected to work on. It gives the overall design for building the power your group needs to win. It can be completed in one longer session or broken up and completed in smaller segments over a period of time. It is sometimes helpful to ask people who know about the community to help you fill it out since the group may not know enough about the community. For example, you can invite community members to meetings where you discuss parts of the strategy chart.

The community members are local residents with whom the local members could identify, and able to convey important information that the group lacks such as a complete list of potential allies. Minimally, it is important to involve the leaders and staff of your group in this exercise.

The strategy chart and its terms were developed by the Midwest Academy, a training organization in Chicago that has worked with hundreds of groups around the country to map out successful campaigns.



1. Introduce the Strategy Chart

30 minutes

Materials: Large, blank strategy chart

Activity: Group Discussion

A strategy is a road map for working on issues. Developing a strategy involves listing the goals that you have, the people you need to get on your side, the people who can give you what you want and the actions you need to take.

There is a vocabulary that we use when we talk about strategy. This vocabulary is composed of strategy words that are derived from the work of the Midwest Academy. Use the blank strategy chart to go over the words.

Issue	<p>The specific solution to a problem.</p> <p><i>Example: Coordination of transportation services district-wide</i></p>
Target	<p>The person with the power to give you what you want.</p> <p><i>Example: School District Board Members</i></p>
Constituents	<p>People and/or organizations that agree with your issue and want to win the issue for the very same reasons you do. Their self-interest is the same as yours. Often, they represent the same group of people you are working with, (e.g., parents).</p> <p><i>Examples: Parents with students at different schools, parents of students with disabilities</i></p>
Allies	<p>People and/or organizations that agree with your issue but for reasons that are different. Their self interest is different from yours, but they want the same thing as you.</p> <p><i>Example: Neighborhood group that wants fewer students loitering at a corner store due to differing bus schedules</i></p>

Opponents People and/or organizations that are not on your side of an issue and who stand to lose something if you win your issue.

Example: After school programs (i.e., karate program)

Tactic The actions you take to pressure the target into making the decision you want them to make in order to win your issue. Tactics should be within the experience and comfort level of your group, and out of the experience of the target.

Examples: Parents testifying at School Board meetings, transportation education campaign, petitions, rally outside School District Administrative Offices

Long-term goal This is the long term goal of your efforts. When working with **parents/community**, frame this as something the group can accomplish in over one year.

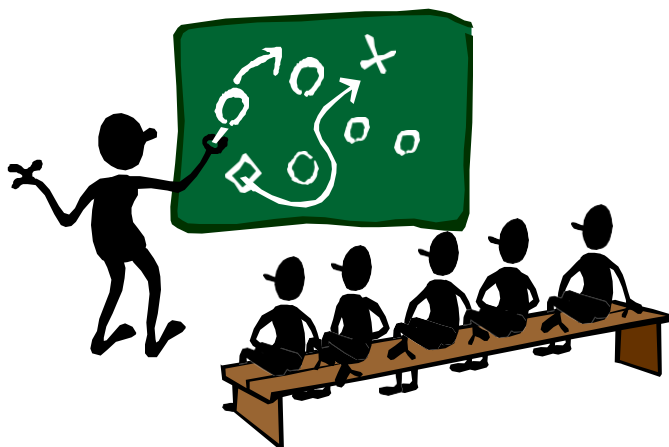
Example: Realign transportation routes

Intermediate goal This is the goal of your campaign. You should choose something that can be accomplished during

Example: Coordination of transportation services district-wide

Short-term goal This is a first step that your group can take to get to your intermediate goal. It may be a quick victory that the group can win, or it may be something your group has to do before working on the intermediate goal.

Example: Conduct community mapping of transportation routes & publish results



Tip: Often when analyzing power relationships, we focus so much on strengths of the opposition that we convince ourselves that we can't win. The Midwest Academy advises putting more emphasis on the opposition's weaknesses and developing strategies that maximize your strengths.

2. Filling Out the Strategy Chart

60 min

Materials: Poster sized strategy chart for the large group.



a. Step 1: Small group work

Divide the group into small groups of 5 – 8 participants. Give each member a blank strategy chart and a strategy chart that has the questions to be answered. Have each group fill out a part of the strategy chart to the best of their ability (for example, give one group the allies and constituents section, another group the tactics section, and so on). It is ok if they cannot fill it out entirely. They might need to do some homework to get more information for the chart.

b. Step 2: Large group work

Each group shares its portion of the chart. A scribe from each group fills in sections of the poster-sized chart as the spokesperson reports back. By the end of this large group session, you will have a giant strategy chart. At this point, everyone should look at what is known and what needs to be researched. Come up with a plan for filling the gaps, i.e. asking people in the community, doing a quick survey.

Once the strategy chart has been filled out, the group can discuss the first steps that need to be taken. These will flow from the group's short-term goal. At this point, the group is launching its campaign!

A note about resources

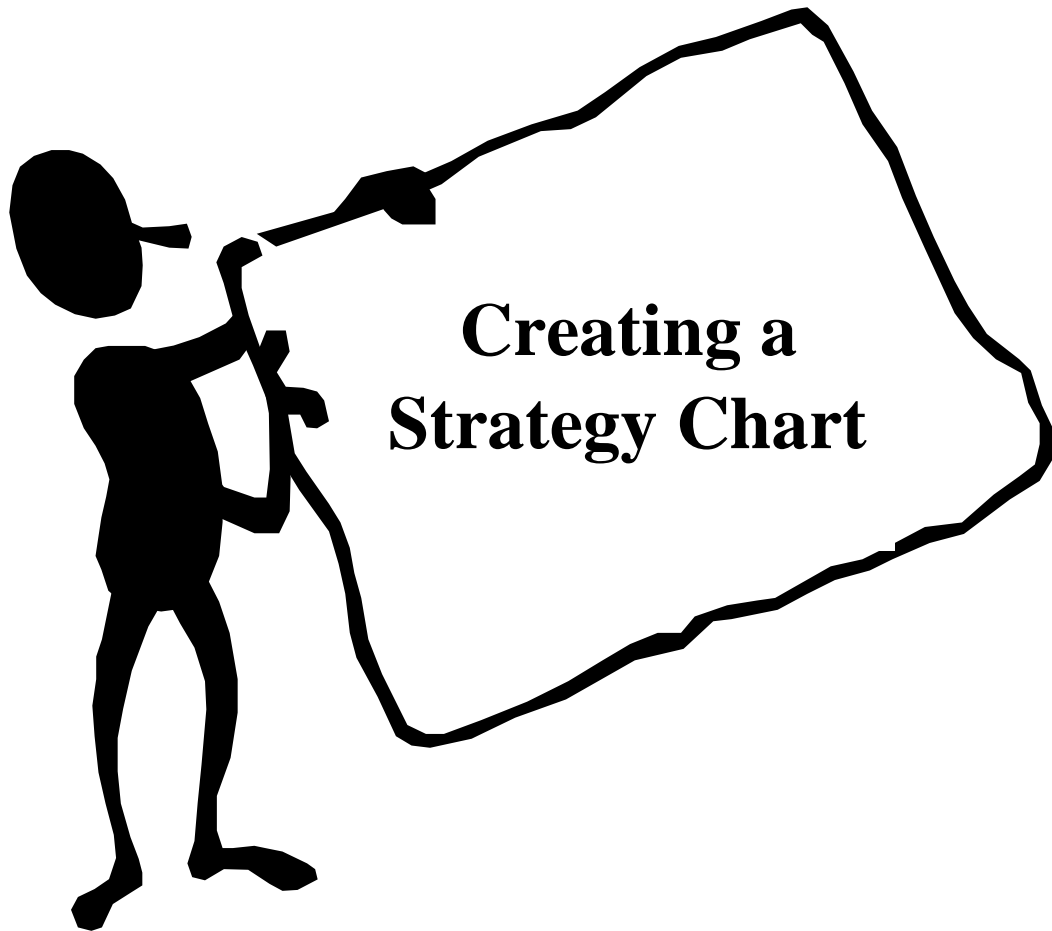
The strategy chart has a column where you can write down what resources you have and what you need to win your issue. It is important to take a serious look at this column so that you can plan to utilize what you have and get what you will need. It also has a place for you to write down what you want to get out of the campaign. This is a very important question to consider. It has to do with what your organization will get out of winning the issue, for example more members, more adult allies, more community support.

Tips

- Many people get confused and think that the strategy is the action you take, like a rally or a demonstration. In direct action community organizing, tactics are the actions you take.
- It is helpful to have people who are knowledgeable about the community fill out a strategy chart with your group. These people are in a good position to be able to identify targets and allies in the community.



Tools



STRATEGY CHART GUIDE

Priority Issue:

GOALS	CONSTITUENTS, ALLIES&OPPONENTS	TARGET	TACTICS	RESOURCES
<u>Long-Term Goal:</u> What is your long term goal?	<u>Constituents:</u> Who are the people - organized or not -on your side of the issue who share your self interest & will benefit if you win?	<u>Primary Target:</u> Who has the power to give you what you want? What power do you have over them?	What are the steps you can take to influence your target?	<u>What We Want to Get Out of This:</u> What organizational gains do we want from this campaign (more people, more leaders, other?)
<u>Intermediate Goal:</u> What you are seeking to achieve in this campaign	<u>Allies:</u> Who are the people and organizations who can align with your issue for reasons that may differ from your own?	<u>Secondary Target:</u> Who has the power to influence your primary target? What power do you have over them?	Partial List of Tactics: Community walk-around Media advocacy Community presentations Letter writing campaigns	<u>What We Need:</u> What resources, people, money, info, other do you have to carry out the campaign? What problems do we need to solve to move forward?
<u>Short-Term Goal:</u> Short term victories on your way to the intermediate goal.	<u>Opponents:</u> Who are the people and organizations who oppose you and who will lose if you win? What will they do to oppose you? How strong are they?		Speaking/Performing at public hearings Meetings with elected officials Postcard/letter campaigns Rallies, pickets, letters to the editor.	<u>What We Have:</u> What resources, people, money, info, other do you have to carry out the campaign?

Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituents, Allies and Foes	Targets	Tactics
<p>1. List the Long-term Objectives of your campaign.</p> <p>2. What are the Incremental Goals for your work?</p> <p>a) What counts as victory? b) How will you win concrete improvements in people's lives? c) How will the campaign give people a sense of their own power? d) How will it alter the relations of power?</p> <p>3. What are the Short-term Goals or Partial Victories that can be steps towards the goal?</p>	<p>1. List the resources your group has available, including:</p> <p>a) people b) skills c) reputation d) access to money or facilities</p> <p>2. List the Ways you want to Build your Organization through the campaign – list #'s!</p> <p>a) Expand leadership group b) Increase members' experience c) Build membership base d) Expand into new constituencies</p> <p>3. List the Internal Problems that need to be considered for the campaign to succeed</p>	<p>1. Constituents: Who cares enough about this issue to join in the fight?</p> <p>a) Whose problem is it? b) What do they gain if they win? c) What risks are they taking? d) What power do they have over the target? e) Into what groups are they organized?</p> <p>2. Allies: Who cares enough about this issue to help out?</p> <p>a) What do they gain if they win? b) What risks are they taking? c) What power do they have over the target? d) Into what groups are they organized?</p> <p>3. Who are your Opponents?</p> <p>a) What will your victory cost them? b) What will they do/spend to oppose you? c) How strong are they?</p>	<p>A target is always a person. It is never an institution or elected body.</p> <p>1. Primary Targets:</p> <p>a) Who has the power to give you what you want?</p> <p>b) What power do you have over them?</p> <p>2. Secondary Targets:</p> <p>a) Who has the power over the people with the power to give you what you want?</p> <p>b) What power do you have over them?</p>	<p>For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p><u>Tactics must:</u></p> <ul style="list-style-type: none"> • Be in context • Be flexible and creative • Be directed at a specific target • Make sense to the membership • Be backed up by a specific form of power <p><u>Tactics include:</u></p> <ul style="list-style-type: none"> • Official contact: meetings, letters, phone calls • Educational, awareness-raising events • Public pressure: call-ins, e-mail or letter-writing campaigns • Media events: press conferences, media releases, op-ed/editorials, etc. • Petition Drive, election campaign, questions at town hall meetings

STRATEGY CHART

Priority Issue:

GOALS	CONSTITUENTS, ALLIES&OPPONENTS	TARGET	TACTICS	RESOURCES
<u>Long-Term Goal:</u>	<u>Constituents:</u>	<u>Primary Target:</u>		<u>What We Want to Get Out of This:</u>
<u>Intermediate Goal:</u>	<u>Allies:</u>	<u>Secondary Target:</u>		<u>What We Need:</u>
<u>Short-Term Goal:</u>	<u>Opponents:</u>			<u>What We Have:</u>

Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituents, Allies and Foes	Targets	Tactics
1. Long-term Objectives	1. Resources	1. Constituents	1. Primary Targets:	Examples:
2. Incremental Goals	2. Ways you want to Build your Organization	2. Allies	2. Secondary Targets:	
3. Short-term Goals or Partial Victories	3. Internal Problems	3. Opponents		

Daily Debrief of Site or Home Visits or Phone Calls

Example: Debrief Questions

1. What went well? What didn't? Why?
2. What constraints or barriers did you face?
How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the work site?
7. How can we do better in the future?

Wisconsin Education Association Council Tactics Manual

Wisconsin Education Association Council Tactics Manual

Introduction

This handbook was developed to assist locals that find themselves in crisis situations. The activities provide step-by-step directions for implementation. Some activities may be done as a single one-time event, while others are long-range or may be done as part of a series of events (depending on the nature and severity of the crisis situation). It is hoped that the user of this guide will view it as a cookbook and thus will carefully choose the recipe to be used and flavor it to individual unit tastes. Keep in mind as well that whatever tactics are employed, they must be part of an overall strategy to influence and to put pressure on the appropriate decision maker.

When determining what activities you will incorporate in your campaign, it is useful to utilize the public's support of public schools to your advantage. Using the message "Every kid deserves a Great School" is an excellent way to elicit public support. To obtain training regarding dealing with the media, please contact WEAC Public Relations & Communication.

When organizing for purposes of getting a contract, one of the most important goals is to establish communication lines to the membership. An uninformed membership is a dead membership in terms of organizing. Without having the backing and the understanding of your membership, any positive goals will be soon snuffed out due to lack of interest.

The Association's capability of organizing a successful rally, picket, boycott, educational workshop for its members or any other action or activity depends upon the Association's participation and power in the political arena. Please keep this in mind as you read and utilize this handbook.

Building Momentum

It is necessary to broaden membership involvement and commitment to provide the level of solidarity needed for success. Members should not be expected to give blind support to something they do not understand. The leadership must convince the members that the cause is worthwhile and that failure to act is an abdication of professional responsibility. It is difficult to build strong support only from an awareness of the issues. Polarize the issues so that members are able to see that the crisis at hand is the result of "bad faith" on the part of decision makers.

It is important that the leadership maintain control of the situation. As the escalation process continues, it is imperative that steps be taken to ensure the membership has complete confidence in the leadership.

Guidelines to Escalation

The whole escalation process must be implemented with regard to the available timeframe. Start on a low key and orchestrate the plan in a step-by-step manner to ensure the greatest impact. Move from the simple to more dramatic. Be aware of the comfort level of the members and avoid engaging them in activities for which they are not yet prepared. Consider using three different phases, with Phase I being the least confrontational and with Phase III being the most difficult. The following are examples of low-key escalation:

1. Give an early indication to the board or their representatives that the members are not pleased with the current situation.
2. Imply that if some movement is not forthcoming, it will be necessary for further consultation with the membership. Also indicate the representative assembly has voiced its concern over a lack of progress toward a positive result.
3. Make it known that there is continued communication from the leadership to the general membership. Indicate that they have been informed of potential problem areas. (Make sure they have been.)

As positions become entrenched, communication should become more specific and more personal (i.e., executive board meets with negotiating team to fully explain the issues). The Executive board then may release a statement to the general membership. Indicate in the release that if positive movement is not made within a specified period of time, further action will be called for.

By this time, the Association should be issuing flyers, newsletters and special bulletins indicating issues, concerns, and problems. Begin to expose attitude of the decision-makers and the lack of respect they are showing toward the members.

Hold building meetings to report the current status of the situation.

A key component to any successful campaign is to gain membership support for actions. Performing tactics without having a clear goal in mind is of little value.

The tactics in this volume have been arranged in the following manner:

1. Media Relations
2. Community
3. Worksite Activities
4. School Board/Administration
5. Parents

Each tactic includes a brief description, a section on preparation, methods for implementing, and considerations to take into account when implementing the tactic.

Remember, there is no one way to organize. What might work best at one worksite may not be successful at another. Giving members choices in the way they organize will help move the process along and provide a better chance of success.

For further assistance in the development of strategies and tactics, please contact the WEAC Collective Bargaining and Research Campus at (800)362-8034.

The compilers of this volume would like to express their appreciation to the following for their contributions to the materials within: Pat Connolly, John Matthews, Joyce Bos, Marv Shipley, Bob West, John Carl Davis, Gene Degner and the Florida Education Association.

Mark Simons
Mike McNett

Category: **Membership**

Tactic: **Attend Bargaining Sessions w/ Candle Vigil**

Description: Depending on what stage you are in negotiations, this is something that may be useful to bring members out en masse to a negotiations session, provided it is done on non-work time.

Preparation:

- Purchase a large number of small candles to be used at the vigil
- Announce to the membership when they should arrive prior to the bargaining session and how long they should plan to stay. Plan to have members present prior to the start of negotiations so that the board's team will witness this prior to bargaining.
- Decide if you want this to be a media event or not, and contact the appropriate organizations.

Considerations:

- You may want to consider having your members attend a meeting without candles, depending on what is taking place at the table. This can serve as a strong show of force, and can be used to get information out very quickly as to the board's response to an issue.

Category: **Membership**

Tactic: **Rally for the Bargaining Team Prior to Negotiations**

Description: This is an event that you can use to fire up your bargaining team, and show support for them in negotiations. This can be done similar to a candlelight vigil for negotiations.

Preparation:

- Decide how long the rally will last, and where it will be held
- Consider holding the rally close to the location for bargaining as a show of solidarity to the board and support for the team.
- Provide refreshments, invite members to bring family to this event.
- Have access to restrooms, which may otherwise be locked outside of school hours.
- Plan the length of the event so that it is adequate to communicate the message, but not so long as to become a burden to the Association's bargaining team.

Methods:

- Have the chief negotiator or a member of the bargaining team address the members, thank them for their support, and articulate to them why their involvement is necessary for success.
- Consider having a local band or other entertainment.
- Members may be asked to wear buttons, or other items showing solidarity.
- Members arriving early may fill the parking lot, requiring board members to park at a distance and walk to the meeting.
- Members may line the halls and cheer the bargaining team as they make their entrance. Signs, pennants, pom poms, and noisemakers are worthy of consideration. Cold silence and looks of disdain may be appropriate as board members enter.
- Have a tailgate party in the parking lot before and during the bargaining session.

Considerations:

- Consider noise restrictions, if any.
- Depending on the space being used, a permit or advance notice of Facility use may be in order. If the event is on district property, review applicable portions of the contract.

Category: **Membership**

Tactic: **Button Wearing**

Description: Members wear buttons to show solidarity and to express their viewpoint.

Preparation:

- Begin by brainstorming with the team or action committee regarding slogans and graphics to be used. Linkage to themes used by speakers and used in other materials distributed by the local may be useful.
- Determine and announce to members whether to wear the buttons always or on specific predetermined dates or days of the week.
- Buttons can be made by a small team of volunteers if a button press is available. Many schools and some UniServ offices have a press. Alternatively, buttons can often be ordered from vendors. Sources and catalogs may be available through athletic directors, cheerleader advisors, and others in the school setting.
- An alternative to buttons is self adhesive stickers. They can be worn only once, but do not puncture clothing, cost less, and the message can be changed for subsequent printings.

Methods:

- Be sure to have extra buttons in the buildings for those members that forget to wear them.
- Some locals may want to track member involvement by tracking how many members at each worksite wore the buttons.
- Find out from those that refused to wear a button, why they decided not to participate so that the local can better address their concerns.
- Button messages should be changed at intervals to keep up interest. This can be coordinated with developing themes as the situation escalates.

Considerations:

- Members may be told by administration that they must take off the buttons because they are “distracting,” or for other reasons. Such incidents should be reported to the building representative as soon as possible. Members do not shed their constitutional rights at the school house door, but there is a balance in case law between the right of the employee and the employer’s need to conduct business. Please contact UniServ staff or the Office of the General Counsel to discuss specific situations.
- Members generally have the right to answer questions from students and others, but should not use class time to initiate or prolong discussions on the topics of bargaining or buttons.
- Should the local decide to acquiesce to district demands to stop wearing buttons at work, an alternative may be to put the buttons on book bags, coats and hats, and other objects which are brought to the worksite but not worn during the workday.

Category: **Membership**

Tactic: **Wear Same Color Clothes To Work**

Description: All members in the unit wear the same color clothes to work on a designated day.

Preparation:

- Decide what color clothing to wear, and on which day(s). It is good to develop a regular schedule, such as a specific day of the week, pay days, game days, etc., or tie the activity to events such as staff meetings, open house, parent conferences, or bargaining sessions. Whatever the schedule, link the members' wearing of the color to the local's message.
- Send out a reminder the day before to encourage members to wear the color.
- The local may determine to produce shirts or other apparel in the chosen color. Such items may be sold or given to members, depending on budgetary considerations. The garment should be of sufficient quality to be worn to work over a period of time, and should have a logo or slogan that promotes the pride and unity of the members.
- For those that forget to wear the designated color, have handy small ribbons of the color that they can wear to show their solidarity.

Methods:

Considerations:

- Have ribbons available for members as well.

Category: **Membership**

Tactic: **Arm Bands**

Description: This can be done in the same manner as button wearing, but for much less cost.

Preparation:

- Determine when you would like members to wear armbands and select a color.
- Arm bands can be created in each building from rolls of ribbon and safety pins or tape. For a more permanent armband, consider better cloth with Velcro or elastic.

Methods:

- Have extra arm bands in the buildings, for those members that forget to wear them on the day they are asked to.
- Get a report of how many members wore the bands and report this information to the action committee.
- Find out from those that refused to wear arm bands, why they decided not to participate.
- Once you have members committed to wearing them, you can increase the number of days that they are asked to wear them.

Considerations:

- Members may be told by administration that they must take off the arm bands because they are distracting to the learning environment. Any incident such as this should be reported to the building representative as soon as possible. As with button wearing, the balance of employee and employer rights may be complex, and the local should consult with UniServ staff and possibly the Office of the General Counsel.

Category: School Board & Administration

Tactic: Letter Writing Campaign

Description: Members write letters to a designated recipient who has been identified by the Association as a key decision maker. This may be a school board member or the superintendent, for example.

Preparation:

- Establish a template that the members can use as a sample on which to base their letters.
- Content should focus on issues of respect and school quality. Letters should not become an attempt to directly bargain specific issues through the mail. Letters should be clear about what the writer wants the decision maker to do.
- Remind members not to be hostile, but to explain the current situation from their own perspective.
- It can be very effective to give a personal example of how the issue impacts the writer of the letter.

Methods:

- The local may decide to have members send e-mail instead of snail mail. Ask members to cc: their e-mail or letters to an Association officer so participation and message can be monitored.
- Determine the pacing of letter writing. There are a variety of possible options:
 - Random flow of letters over an extended period of time
 - Windfall – one voluminous delivery
 - Stagger – assign groups at varied time intervals
 - Immediately – telegrams, over night mail, FAX, e-mail, phone call, etc.
- Conduct a letter writing meeting at the work site or at a leadership meeting, in order to ensure that the work is done.
- Provide a fact sheet to anyone who wishes to write a letter, this will assist them with staying on message.
- Consider having a table set up at Association events to encourage members to write.
- Encourage parents and other supporters to join in the letter writing effort.
- The Association's spokesperson may decide to read selected letters at a school board meeting or other public event (with the writer's permission).

Considerations:

- Be sure that your intended target is someone who can impact the decision that you are trying to change. It is ineffective to target a principal, for

example, if that person has no impact on the district's decisions at the bargaining table.

- Individualized communication is more effective than more general messages. In terms of effectiveness, from greatest to least: personalized hand written, hand written post cards, hand written form/common script language, e-mail, typed form letters/postcards, petitions.
- Avoid making unfounded personal attacks. The potential of being successfully sued for libel is very small, however, regarding statements made in a personal letter to an elected public official.
- Do not make or imply any personal threats against the recipient of the letter, their health, their property, or their family.

Category: **Membership**

Tactic: **Phone Banks**

Description: When it is necessary to contact a large number of people, or to turn out a large number of members to an event, considering using a phone bank.

Preparation:

- Compile or obtain lists of individuals to be called.
- Select a phone bank site that has a sufficient number of phone lines available. Sometimes UniServ offices, banks or other office buildings will let a local use their phones after business hours.
- Develop a phone script that is short but gets to the message you are trying to convey. Be concise and ask for a response.
- Recruit volunteers to make calls, and assign them to shifts no greater than two hours in length. It may be necessary to run multiple shifts.
- Provide a tracking form for callers to use. Include any information that the callers will need, and any information that you may need to obtain through the calls, such as a commitment to participate in an event, verification of their current home e-mail address, etc.

Methods:

- Make calls when individuals are most likely to be available. 5:00 to 9:00 p.m. is a likely time range.
- Provide refreshments for the callers and thank them for their contribution of time.

Considerations:

- Most people do not like to get what they perceive as telemarketing phone calls, so be sure to keep your message short, and ask the individual for a commitment. The longer the script, the less likely they are to be supportive.
- Some organizations use an automatic dialer for phone calls. A large number of people can be quickly reached with a message, but this method does not allow you to ask them for a direct and immediate response. Autodial services can be expensive, and may limit the length of your script to thirty seconds. This method is good for quick reminders or to refer people to a website or other information source.
- Establish a hotline or website at which members or community people can get further information.

Category: **Membership**

Tactic: **Work Site Meetings**

Description: By holding work site meetings, leaders will be able to address member concerns directly and can stay in touch with the thinking and climate in various buildings.

Preparation:

- Hold work site meetings at times that are most convenient to the members at that location. To have best attendance, take into account start and end times, meetings and after school activities that involve staff, shared break or lunch times and other factors that impact member schedules.
- The goals of a work site meeting are to inform, answer questions, receive input, clarify issues or positions, determine level of support, or ask the membership to participate in an activity.
- Tailor your discussion to your anticipated audience. Each worksite has a different personality, needs and level of commitment to the Association.
- Select a place to meet. In most cases, this will be on site. In some instances, members may be more comfortable at a local restaurant, bar, or someone's home.
- Establish and print an agenda ahead of time. If the agenda is long, it may be better to schedule a series of short meetings rather than to keep a group of tired people for too long a time.
- Notify members at the work site at least one week in advance whenever possible. Consider having the meeting's speaker (union leader, bargaining team member, or staff) mentioned in the announcement for the meeting to gain interest.
- Remind audience one day before with a flyer and possibly a copy of the agenda.
- Consider holding questions until the end of the presentation, if necessary, to keep the meeting on time,.
- Have handouts and materials ready the day before.
- Advertise start and end time, and stick to it.

Methods:

- Serve refreshments.
- Keep the meeting brief. Consider holding questions until the end of the presentation, if necessary, to keep the meeting on time.

Considerations:

- Establish a series of monthly or bi-weekly meetings during negotiations.
- Review contract language regarding use of district facilities for meetings.
- Be aware that any printed or spoken information given to broad groups of members will quickly find its way to the administration.

Tactic: **Boycott**

Category: **School Board & Administration/Community**

Description: A boycott is an organized means of nonsupport of products, goods, services and/or businesses. The association can use boycotts to exert pressure on businesses that have damaged employees and/or association.

Preparation:

- Determine whether a boycott is feasible and whether one can be staged that will put pressure on a key decision maker. This assessment may include an estimate of the share of revenue members and supporters bring to the selected business.
- Gain commitments from allies and supporters to participate in the boycott.

Methods:

- Inform members of the boycott and gain their commitment to participate.
- Ask allies, parents and other unions to participate.
- Distribute leaflets to the public in front of the boycotted business.
- Organize picketing in front of the business.
- Announce the boycott to the press to educate community as to why the boycott is necessary and to enlist their support and participation.

Considerations:

- Boycotts should be used in situations in which the local will be able to exert an effective economic impact on a business.
- Boycotts in general can be very difficult and time consuming, consider why you are proposing it, and how it will be effective. Be sure to have a timeline established which spells out what your goals are.
- In considering a boycott, always remember who your target is. For example, if you have an uncooperative school board member who owns a local business, consider targeting that person's business for a boycott.
- Look as well at secondary targets that might be able to put pressure on your intended target. This may be, for example, a grocery store that does business with your primary target. Be sure to publicize why you are boycotting a product or business.

Category: School Board & Administration/Community

Tactic: Pack Up Personal Equipment

Description: Members pack up all the personally owned equipment, supplies and materials that are present for use at the worksite. This is an event that can be used to illustrate the amount of items that teachers or support personnel use on an every day basis that is their own products and not provided by the school district.

Preparation:

- Inform membership that a certain day they should pack up any and all personal equipment that they use and be prepared to take this equipment home.
- Be sure to provide boxes so each member can pack items that belong to them.
- Make an inventory of what items members are removing from their worksite that belong to them.
- By having members create an inventory, this will provide more information to the media and administration what isn't provided to our members.
- Do not allow for members to be seen leaving by themselves. A large group of members packing up and walking out all at once is very effective.

Methods:

- Have each member take their items to a central place all at the same time. If possible, use the front door of the school, so that it can be shown all at once.
- This is a good media event; and it will show how many items members have to use every day in order to provide a quality learning environment .
- This shows items that are not provided by the district due to lack of funds.

Considerations:

- When deciding to do this, be aware that the removal of necessary items from a member's room will affect the member directly to do their job effectively.
- Many members will resist taking out critical items that are not provided by the school, and will impact the learning environment of their children.
- The need to publicize what items the members use that they purchased is also an effective way to get the message out prior to having them remove these items.
- Publicize the fact that these items are not provided by the district prior to having them remove them. This will put the district/media on notice as to what items will be removed at a certain time.

Category: **Membership**

Tactic: **Leave & Arrive at Same Time**

Description: Have members meet in a central location before or after school, or both and walk in or out of the building together. This should be done at the time when it is the contract start or end time.

Preparation:

- Designate an area where members know and feel comfortable meeting. This should be an area that is highly visible to the administration/general public.
- Having members enter and leave at the contract time can be a powerful showing of solidarity.
- This can be done in stages. For example, you could have members meet on Wednesdays to walk in or out together.
- Be sure that the media is aware of this action in order to get coverage.

Methods:

- If possible, have a member announce over the school PA when it is time to leave. This could be done like, "It is now 3:45. Thank you."

Considerations:

- Some members will be resistant to this idea since they usually will get to school early for prep or stay late to assist students or for voluntary activities.
- Be sure prior to deciding to do this that you have the support of your membership to follow through. Be sure you survey to get an accurate read on what their comfort level is.
- This is another form of working to the contract that can be divided up to utilize in a way that is effective.

Category: **Membership**

Tactic: **Resign From Voluntary Activity**

Description: This activity is another work to rule that is also effective. Members resign from voluntary activity by writing out what it is that they volunteer to do, that they will no longer participate in.

Preparation:

- Have members write down all of the voluntary activity that they do for their school or students.
- Once this list is prepared, be sure it does not include activities that are paid extra-curricular or activities that are required to be performed under the contract.
- Voluntary duty could include for example, playground duty or detention duty that employees volunteer for, but are paid. The alternative may be to have employees assigned on a rotating basis, depending on their contract.
- Consider taking out an ad in the local paper illustrating all of the activities that are done on a voluntary basis by your members.

Methods:

- Resignation may be done at one time or en masse, with employees dropping their resignations off at the principal or superintendent's office. Potentially a good media spot, if done en masse.

Considerations:

- Some members may not be comfortable losing the extra pay that they receive for some activities, so be aware that all members may not resign from work.
- Be sure to review contract for other potential volunteer activities that may be targeted, for example, a school function where attendance isn't required, but is expected would be a good function to cease.
- A careful review of contract language and prior grievance history is necessary to determine options on voluntary activities.

Category: **Membership**

Tactic: **No Representative at Administration/Student Faculty Meetings**

Description: This is another activity that can fit under working to contract, for those committees that are advisory and are not mandatory; this is another voluntary activity to resign from.

Preparation:

- This requires the person who was appointed or volunteered for this committee to make a formal and public resignation of being on the committee. This can be effective especially when the committee is one that is working towards goals that the administration is pushing.

Considerations:

- This again is another activity that must be clearly voluntary, and not mandatory. A careful review of your contract prior to resignation is necessary so there isn't a contract violation.
- Refer to "Resignation from Voluntary Activities" for more detail.

Category: **Membership**

Tactic: **Cancel Student v. Faculty Game**

Description: Some schools sponsor a student v. faculty baseball, volleyball or basketball game. Canceling this game is another activity that can be covered under working to contract.

Preparation:

- In considering this activity, this is one that can be a good or bad media event, depending on how it is handled.
- This can be cancelled before preparation for the event is done so as to not create necessary work.
- This can also be a situation where all of the members that are scheduled to play, show up at the game, and then walk away. However, depending on how this is fashioned, this can be a public relations nightmare, so be cautious with this kind of public display.
- Be sure you have the full support of those members who were going to play in the game, that they are comfortable with not playing. Should you have lukewarm support, do not attempt this activity.

Considerations:

- This is an activity that requires attention to detail, and can be very successful at showing the activities that are performed by the members on a voluntary basis. However, without proper planning, this may be seen in a negative light within the community and by parents, so be sure you have planned and are prepared to follow through.

Category: **Membership**

Tactic: **Work to Rule/Contract**

Description: This is an extreme job action. It calls for a concerted effort on the part of employees, a well-developed plan of action from the association and a well-educated corps of building representatives. The association must be thoroughly familiar with contractual and job requirements. Under Work to Rule, employee's work to the letter of the contract, fulfill job requirements and no more.

Consider and plan these activities as a series of events; phase in rather than initiate multiple events. This may be done in conjunction with other planned activities.

Preparation:

- A careful review of the contract as well as grievance history is necessary prior to starting any kind of work to rule activity. You must be fully aware of what activities are voluntary, and which ones are not. Without this review you may put members at risk by asking them to work to rule and violate the contract.
- Next to a strike this is viewed by a lot of members as the most extreme activity they can undertake. Consider using portions of this as the last phase of a coordinated campaign for the membership.

Considerations:

- Once a review of contract and grievance history has been completed, considering writing down all of the activities that members perform that are outside of the contract, then survey members as to what activities they are comfortable not performing as part of this campaign. Taken in smaller steps will provide members more comfort than taking one giant leap on several different activities.

Note: Not effective over a long period of time as members lose focus and interest.

Category: Community

Tactic: Door-to-Door Leaflets

Description: A flyer should be made up that illustrates the position of the bargaining unit to the general public. This should be done so that you have an issue that the public will support. This flyer can be for information or this can be asking the public to do something specific.

Preparation:

- Find out if any local ordinance prohibits distribution of leaflets. **IT IS AGAINST THE LAW TO PUT ANYTHING BUT MAIL IN THE MAIL BOXES AT PEOPLE'S HOMES.**
- Find out if your members are committed to the task, by informing them of the purpose of the leaflet and ask them for a specific amount of time to assist, usually one or two hours.
- Set a specific date and time for the project. If everyone is working in the district at the same time, it creates a sense of unity among the members. An open house or party can be planned at the end of the task.
- Get a large street map from your municipal government. A land-use map is helpful because it shows number of households in a building, e.g., apartment, duplexes, etc. A local directory that lists addresses by blocks is also helpful.
- Divide city into areas where each member will have an equal amount of leaflets to be distributed. Keep in mind rural v. urban areas when dividing up areas. Usually, have each area given to two members so they will not feel alone when distributing leaflets.
- Dividing the district into areas is a time consuming task, but once the work is done, the system can be implemented on a very short notice.
- You may want to check around to see if someone else in your community has already done this task, e.g., political candidates. We have found that our system is better than any we have seen. We have loaned it to select groups or candidates.
- Ask members to sign up with a partner. If they have a preference for a certain area, they may indicate that when they sign up.
- After the committee has made assignments, a notice is sent confirming the time, date, etc. It is made very clear that they are expected to show up or a colleague will have to do double duty and pick up their assignment.

Methods:

- Committee should obtain:
 - printed flyers 10% more than number of households
 - rubber bands
 - large plastic bags
 - refreshments
- As each team arrives at the leafleting center, it is given an envelope with instructions, a map marked with the team's assigned area, and a number designating the number of leaflets needed by the team.
- Once a team is finished, have them turn in their envelope to a designated contact the next day back at school, or have them drop off at the leaflet center to drop off the unused leaflets. Refreshments should be provided.
- A follow-up thank you letter is sent to all members who helped to participate.

Considerations:

- Be sure to recruit the necessary amount of members to perform the task. There is a potential for a failure if there is too much work to be performed by a few members.

Category: Community

Tactic: Leaflet Popular Locations

Description: This activity should be done at locations where there are a lot of members of community that visit. For example, the post office or local K-mart on a Saturday is a good location to leaflet.

Preparation:

- Have members prepare to hand out leaflets for a set period of time, for one or two hours
- Be sure volunteers are knowledgeable to answer questions that arise
- Find out what times are the busiest for a particular location

Methods:

- Hand out leaflets to those community members who visit a location
- Leaflets should describe the problem to educate public
- If needed, ask community members to do a certain action

Consideration

- Be certain that you are on public land when handing out leaflets
- Do not antagonize those that refuse a handbill

Category: Community

Tactic: Coalition

Description: A coalition is a group of allies that creates strength out of diversity. It is made up of dissimilar groups who have discovered common goals and have agreed to band together to achieve them.

Preparation:

- Use a coalition to build an action program to accomplish long term goals, or achieve a short term objective.
- Use political campaigns (to elect school board members, legislators, the superintendent), or to recall elected officials.
- Use this in lobbying at various levels of government to promote or prevent the enactment of legislation or an act of an elected body, or as a Public Relations tool.
- To create or aid in a militant action, (demonstrations, picketing, leafleting, rallies, etc.); use as an investigation or factfinding.
- Use the cooperative power of a group of people with common concerns.
- Make sure that mutual benefits will result; the mutual benefits must accrue to the individual groups and individual members of the coalition.
- Fight no battles you cannot win by setting long term and short term goals
- Understand the self-interests of members of the coalition.
- Develop communication and recruitment skills.
- Understand that diversity among the coalition members is strength.
- Learn how to refine and utilize information gained through and from coalition members.
- Develop mutual trust and respect.
- Identify talents and skills and use them.

Methods:

- Start with the known, i.e.
- Seek out your present allies for a new commitment
- Look at other groups who are sympathetic and may have some objectives in common with your local
- Select your most effective, articulate and committed leaders and rank and file to recruit leadership from prospective allies
- Develop an action program, which can be explained and sold to prospective coalition groups
- Show respect for coalition groups by having a representative from your local attend coalition groups' meetings (Be sure the welcome mat is out)
- Develop and coordinate an external (from the coalition) PR system
- Develop and coordinate an internal (to the coalition) PR system

- Don't re-invent the wheel; the coalition should not re-do things that may have already been done by groups within the coalition; this gives the impression that the coalition leaders have not done their homework
- Recognize and respect the dignity of coalition leaders and the rank and file

Considerations:

- **Here is a list of possible allies:**
 - Affiliates of the Wisconsin Federation of Teachers
 - AFL-CIO central labor bodies
 - AFL-CIO public sector unions
 - AFL-CIO private sector unions
 - Political Action Committees
 - League of Women Voters
 - The Junior Chamber of Commerce (Jaycees)
 - Lions Club
 - Rotary Club
 - Kiwanis Club
 - Fraternal Organizations
- **The interest groups include:**
 - Minority rights groups
 - Women's groups (NOW, Woman's Political Caucus, etc.)
 - Council of Churches (Ministerial Associations, etc.)
 - Community services (United Way, Family Services, Child Guidance Clinics, etc.)
 - Drug abuse agencies and organizations
 - Taxpayers associations
 - Senior citizens groups (Golden Age, UAW Retired Workers Councils, etc.)
- **The Social Clubs would include:**
 - Elks
 - Knights of Columbus
 - American Legion, VFW, Am Vets, Disabled Veterans, Vietnam Veterans and other veteran's organizations
- **Some of the "power" groups would include:**
 - Bar Association
 - Bankers, Savings and Loans, etc.
 - Chambers of Commerce
 - Farm Bureaus, etc.
 - Environmental groups (Sierra Club, Audubon Society)
 - Historical Societies
 - Home Builders
 - Real Estate
 - Booster Clubs
 - Athletic Groups
 - Police Chiefs, Sheriffs and other law enforcement organizations
 - NAACP and other civil rights groups

- **Other groups might include:**
 - AIDS groups
 - Hospital associations
 - Dental, optometry, pharmaceutical organizations
 - Cancer Society, Heart Association, Red Cross
 - Student and University Groups
 - Neighborhood associations
 - Anti-censorship groups
 - ACLU
 - People for the American Way

Considerations:

Category: Community

Tactic: Speakers' Bureau

Description: A speaker's bureau is a means of providing the association, via selected speakers access to the community through varied groups and gatherings.

Preparation:

- When deciding whom to have as spokesperson(s), be sure that the person(s) are able to articulate your position effectively. The best are those who can articulate your position from their own personal perspective.
- Develop a file of groups within the community that your speakers would be able to make a speech at. These may be various groups within a potential coalition that you are developing, or they may be groups that are influential in the community.
- The important thing to remember is that you are trying to get your message out to the community the most effective way possible. Consider using many alternatives as possible. Brainstorm groups that might be willing to hear what your members have to say.

Methods:

- Be sure to stay on message when speaking to a group. There will be a tendency to change message, but don't change your intent.

Considerations:

- Some groups may be hostile to your members, so it is always good to have your speakers be prepared for the worst. Role-play various scenarios whereby your speakers are put to the test, offer them suggestions on how to answer various questions.
- Prepare talking points for all members and remind them to stay on message.

Category: Community

Tactic: Community Newsletter

Description: This is another way to communicate within the community about the situation that your members are faced with. This should be used in conjunction with other efforts to get your message out.

Preparation:

- Consider publishing stories that would be of interest for anyone in the community. Do not begin by listing how bad things are, but by building up interest in what is going on at the school level.
- Consider this a forum that you can use to publicize what is going on that is good at your school.
- Publish stories that are human-interest stories of members or students (be sure you have the permission of the parents).
- Consider keeping the newsletter to one page, and publish on a regular basis, bi-weekly for example.

Methods:

- Put in smaller notes about what the current crisis is doing to the school, as you start out. After you have continued to publish, you can then add more stories about the plight of the students and the plight of the members. Consider again, the source of whom you are writing to.
- Make sure the newsletter is professional looking.

Considerations:

- Be consistent in the format of the newsletter, and talk with local merchants about having the newsletter on their newsstand, or in a location where other community interest items are located.
- This can also be sent home to parents by handing it out to students.

Category: Community

Tactic: Truth Booths

Description: In a public location, for example inside of a shopping center, is another way to get your message out to the community. This consists of inexpensively constructed booths, or of no more than card tables and folding chairs.

Preparation:

- You will want to staff your booth with a couple of members at a time. They should be prepared to answer questions that the community may have regarding the situation at hand.
- Have your members be prepared with Q & A booklets, fact sheets, or pamphlets that they can hand out to those that have questions. Have members sign up for one to two hour blocks of time, depending on how long you want them to be visible. They should sign up in pairs, but don't be afraid to only have one person at a time at the booth.
- Check with local officials regarding locations where a truth booth would be acceptable.

Methods:

- This is a great opportunity to have members be visible to the community and getting out the message they want delivered, and not the message of the opposition.

Considerations:

- When deciding to do a truth booth, it is important that those members that sign up are fully briefed on the issues and feel comfortable talking to members of the community. They should be given some ground rules and have role-played various questions that they might encounter prior to their shift.

Category: Community

Tactic: Koffee Klatches

Description: This is another opportunity to get your word out to the general public by having informal coffee question and answer sessions at the home of a concerned parent or other community member.

Preparation:

- Active parents or other community supporters should attempt to hold a klatch at their home. They should invite eight to fifteen neighbors or friends over for an informal get together at their home to discuss the situation at the school.
- This is something that can be done in multiple places at the same time, and you should be prepared to have teams of members who can go out into the community and meet with concerned parents or other community members.
- This can also be done on a regular basis if necessary; for example it could be done once a semester, but in times of crisis, it may be necessary to meet more frequently.
- Members should be prepared again, to answer questions and give information; talking points should be developed.

Methods:

- The session should start with a short presentation by an association spokesperson and then as much time as possible after for questions and answers. There should be time as well for people to socialize and circulate and continue discussions one-to-one with parents.
- Two or three members should attend each session, and should bring coffee and cookies, and stay around afterwards to help clean up.

Considerations:

- You may be invited to an anti-education group, who just want to “sucker you in.” Know who are your enemies within the community, and what their goals are as well. You may want to attend an anti-education meeting, but don’t go there to argue, just go there to present your information, and answer questions.
- Once these klatches begin, there will be great demand for them, be prepared to attend multiple klatches during times of crisis.

Category: Community

Tactic: Petitions

Description: A way in which you can broaden your support for your issue by having the community voice their concerns as well. This can be used to get a name on a ballot for a local school board race and can be similar to a letter writing campaign, if your attempt is to get more support.

Preparation:

- Decide what issue you want to have the community support. This should be specific, and should be done in a way so that signing the petition shows that they support you in your efforts.
- Consider first having members solicit signatures at locations that will allow you. This could be the local K-Mart, or post office. Be sure you are aware of any local ordinances that might limit your ability to collect signatures.
- If necessary, you may want to consider going door-to-door (in the same way that you set up a leaflet, you will want to set up a canvas for signing petitions). Should door-to-door be the case, you will need to have your members be prepared to talk and answer questions by the community as to why they should sign a petition.
- Talking points, and a handout are good items to have for each member.

Methods:

- Each person circulating the petition should:
 - Personally witness each signature
 - Verify before a notary public that you witnessed each signature
 - Insure that each petition signer is a registered voter in the state
 - Have on each sheet the following boxes:
 - Signature
 - Printed name
 - Address
- (This is vital if you are having a petition for getting someone on a ballot.)

Considerations:

- When deciding to do a door-to-door campaign, be sure that you do the same amount of preparation as you would for a leaflet. In this case the members will need to be much more educated about the candidate or the issue they are having the community sign on to.

Category: Community

Tactic: Mass March

Description: This is helpful if you have a very active and large local and are convinced that members will turn out for the march. Can be a good way to build morale and show solidarity to the community.

Preparation:

- Determine where you want to march, and what the purpose is for the march. If you have an upcoming school board meeting, and you want to build this as part of a rally or orchestrate a large gathering, doing a mass march is a good idea.
- It is a good idea to have speakers either before the march or after the march as a way of culminating or beginning the efforts. If you are marching to an event, review with local authorities what types of permits if any you will need to have.
- Provide a map for members, with a clear start time, and end time. Explain the purpose behind the march as well.
- Check for the availability of “portable potties” for the march.
- Be familiar with the area, and check it out for hazards along the way of the march.
- Have signs made up and hold a sign making party.
- Be sure the local media is aware of the march and the purpose behind it.

Methods:

- Designate lead organizers who are responsible for directing the marchers and keeping order during the march. They should be positioned throughout the group to keep them on task. They can also be helpful for leading chants during the march.
- Have organizers be designated with armbands for clear direction.

Considerations:

- Doing a march is a good way to relieve frustration, show strength, build PR, gain support and change opinions. When you are contemplating a march, be sure you have enough members who are interested in doing it. It can be very demoralizing if you have a march planned and don't have members show up.

Category: Parents

Tactic: Letters to Parents

Description: This is a tool that can be used to communicate directly with the parents of the children in the school.

Preparation:

- For teachers, have them write letters to parents on the local union's letterhead. This will send a message of solidarity, but also will get the parents used to the idea of the union, and that their child's teacher is involved.
- Write notes to parents on a regular basis, this should be personal at first, then once you've started writing them, you can also develop multiple letters that can be sent to any parent.
- It is good to start off with something that talks directly about how their child is doing, and then begin to deal with issues that may impact their child's education.
- If you have developed a relationship with the parents, it can be useful at some point to ask the parents to assist you in your efforts to mobilize.
- You can also use a bi-weekly letter that is sent to all parents from a particular teacher giving them classroom updates, and also have points in the letter about the issue you are trying to get them to understand.
- This is time consuming, and it may be helpful to have form letters to show teachers what information would be appropriate in a letter to parents.

Consideration:

- Keep in mind, that the parent's interest is from their child's perspective. They want what is best for them, so in writing your letters, always keep that perspective in the back of your mind. Make it personal.
- Consider using this to convey information not only about how the child might be doing, but also other issues that the parents should be aware of.

Category: Parents

Tactic: Phone Calls to Parents

Description: Can be used similar to letters to parents, but this is more personal than a letter.

Preparation:

- Prepare in the same way that you would if you were writing letters home to parents. Keep the information specific; you can establish the relationship by dealing with their specific concern...their child.
- Once you have established your relationship, you can inform them of issues that directly affect you and most importantly, their child. This should be done in a subtle way. You don't want to make a call that says, I'm underpaid and I want you to feel sorry for me.
- Have a list of talking points for anyone making calls. This can be useful when a question comes up from a parent that is concerned about the issue you are trying to work on.

Methods:

- Keep the conversation short and to the point. If you are calling only to solicit their support be sure you are clear as to what you want them to do in the future.

Consideration:

- In the same manner as letters to parents, the parents should see a phone call as the educator looking out for the individual child's concern. If you take the approach that the child is secondary, the parents will know it, and won't be supportive of your efforts.

Category: Parents

Tactic: Homework Hotline

Description: This can be something that can be started by the members to assist students with their homework, and also a way to connect with parents.

Preparation:

- You'll need to decide how to staff the hotline.
- You'll need to be sure that if you have multiple grade levels, which is responsible for each level.
- You may want to use this as an opportunity to connect with parents at their homes.
- If necessary, be sure that those that staff the hotline are comfortable with issues that they may be questioned on.

Methods:

- This should be used to help students, as it also will give you a direct line to parents.
- Have talking points available.

Consideration:

- This may take a lot of time to prepare and to staff a hotline. Be prepared to work with phone companies or use cell phones in order to deal with logistics.

Category: **Media**

Tactic: **Ads in Football/Basketball Program**

Description: Writing an ad that will appear in the school program explaining the current situation that the school and the members face.

Preparation:

- Find out from school printer what is the deadline for advertisements.
- Find out any restrictions on who or what group may place ads.
- Should there be a restriction on staff having ads in the program, consider contacting a local merchant who is supportive of your cause and ask him/her to sponsor your advertisement.

Considerations:

- When doing advertisements, be sure that the ad talks about how the school and the students are impacted by the current situation, to have the broadest appeal.
- Depending on costs or restrictions, you may consider writing multiple ads, where you have testimonials for example, that talk about the current situation.

Category:

Media

Tactic:

Meet with Editorial Board

Description: A small group of local leaders meet with the local newspaper's editorial board to describe their situation and ask for support from the editorial board.

Preparation:

- Contact local newspaper and inquire what the process is to meet with the editorial board. Schedule a time, up to one hour to meet directly with the editorial board.
- When preparing to meet with the editorial board, the group should designate a spokesperson that can deliver the information to the editorial board clearly and concisely.
- Contact WEAC's Public Relations campus for more in-depth information regarding editorial boards.

Methods:

- Remember to stay on message.
- You're there to state your case, so bring any fact sheets, or question and answer books you have that make your case stronger.

Considerations:

- Not all newspaper editorial boards will grant you a meeting, much less support your position, and so remember that you are not necessarily dealing with people who are going to be sympathetic. Some in fact, may be down right hostile.
- Don't argue with members on board, making a bad impression is worse than making none at all.

Category: **Media**

Tactic: **Public Service Announcements**

Description: A member of your local makes a public service announcement on a local radio describing the current situation to the public, and asks for support in your efforts. This may involve asking the public to do something specific.

Preparation:

- Inquire with local radio stations about the costs associated with making a 30 to 60 second public service announcement.
- Be certain that the audience you target is in the radio's market. Ask for their market demographic information.
- Once you have decided to do this, begin by drafting a script. Be sure that your script is clear and stays on message. For specific assistance on writing radio ads, contact WEAC Public Relations.
- Decide what activity or what action you want to attain by doing the ad; and make sure in the end this is accomplished.

Considerations:

- The cost to do an ad may be expensive, so be sure you have your target in mind and can articulate your position to the general public.
- Be sure you go through several practice runs, and several revisions to make your information relevant and important to the general public.
- You may need to run several ads in order to see a change; generally, someone needs to hear your message seven times before it begins to sink in.

Category: **Media**

Tactic: **Letters to the Editor**

Description: An inexpensive way to reach the community is to have letters to the editor submitted by members of the bargaining unit.

Preparation:

- Should you decide to write a letter to the editor, be sure that your letter is well written and to the point.
- If you use data, it should be accurate.
- Watch your use of jargon.
- Submit the letter to the local leadership/action committee to be sure that it is consistent in the message you are trying to get out to the community.
- Decide if you want to have letters from members representing themselves, or have leaders write letters representing the membership. Both are effective.
- Submit the letter for mid-week publication.

Methods:

- Create a sense of urgency and propose specific ways in which the reader can take action.
- Advocate your position; don't try to rationalize the board's position.

Consideration:

- Remember that it is important to have letters to the editor in response to a negative article that is written in the newspaper regarding your cause. It is helpful to have members assigned to be the watchdog of the newspaper for articles that appear to be biased or slanted, and that the association have a response.

Category: **Media**

Tactic: **Press Releases**

Description: This is an opportunity to write a story for the media to use about a current situation that is occurring at the worksite.

Preparation:

- Consider what you're attempting to have the media respond to. If you are announcing an event, you don't want to give the entire story to the media before the event occurs. It is best to give the information to the media about when and where, but save the story for the event. At the event you can then hand out a press release that gives the story to the media.
- A press release should be no longer than two double-spaced pages.
- Use short sentences and paragraphs.
- Make certain facts are absolutely accurate.
- Check for proper spelling of names.
- Avoid jargon and technical terms or explain them if they must be used.
- Don't use initials without indicating what they stand for in the first reference.
- Write factually and objectively – avoid editorializing and using adjectives.
- Insert pertinent quotes from local officials, specific examples and anecdotes.

Methods:

- If you are at an event, have the story written for the reporter, be sure that in the first paragraph, your message and your point is delivered.
- At any event, be on the lookout for the reporter and be sure your spokesperson talks to them.

Considerations:

- The press get numerous press releases announcing events every day, consider the day of the week you schedule an event on, in terms of what kind of coverage you will get.
- Have the personal contact with the reporter so that he or she knows you, and would be more inclined to attend the event.

Category: Media

Tactic: News Conference

Description: A staged way that you can get your message out to the community with the help of the media. Be sure however that it is news worthy, has a personal side to it, uses pictures, and has a quote that can be used as a sound bite.

Preparation:

- The key to a successful news conference is to make sure you really have important news to announce. If you "cry wolf" too often with "no news" conferences, the media may not turn out when you do have something important to say.
 - Send a news release to every community news outlet three to five days before the event. (In urgent situations, notification can be handled by telephone.)
 - Direct the release to assignment editors, news directors and reporters, giving them the date, time, place and topic of the conference.
 - Schedule the conference to coordinate with media deadlines.
 - Make follow-up calls the day before the conference urging reporters to attend.
 - Select a location and room for the press conference; the local headquarters is often a good site.
 - A familiar public place will do if the local's offices are not suitable; or try to pick a site that relates to the news story. (If you are talking about poor conditions in a school, hold the press conference at a school.)
 - Choose a room that is large enough to accommodate the media, cameras and other equipment
 - Make sure there are plenty of two and three-pronged electrical outlets for reporters' equipment (lights, recorders, typewriters).
 - Provide a lectern that can hold several microphones.
 - Display the local logo in a prominent spot that does not have glare.
 - Provide chairs for reporters, name cards for speakers and an easel for visual aids.
- Almost all news conferences should offer visual presentations for television cameras and print photographers.
 - Display visuals prominently near the front of the room for easy reference by the speaker

- Keep visuals clean and simple; remember that the visual may receive only two or three seconds of actual TV time
- Use colorful charts and graphs to demonstrate goals you've set and achieved
- Media kits should be prepared for reporters attending the conference (and to deliver afterwards to those who do not attend). They should include:
 - A copy of the spokesperson's statement
 - A news release detailing the topic
 - Biographical information and photos of the speakers
 - A fact sheet or brochure on your local, state, and national affiliation
 - Reproductions of charts or graphs used
 - A slide of the local's logo so TV stations can project it during the news story
 - Review the issues with the speaker(s)
 - Take the role of a reporter and ask the spokesperson those difficult questions that may arise
 - Have other officers attend the news conference to provide expert information and moral support
 - Consider all statements as "on the record"
 - Double-check the conference room about an hour before the event to make sure everything is set
 - Unlock the room and set up chairs
 - Provide a media sign-in sheet so that you can follow up and make further contact
 - Consider serving modest refreshments
 - Start the conference on time; limit it to 30 minutes
 - Have the media liaison or PR committee chair introduce the speakers
 - Conduct a question-and-answer session after the statement
 - Have a room available for follow-up interviews

Category: Board and Administration

Tactic: Pack School Board Meetings

Description: Fill the board's meeting with members and supporters to show the presence, interest, support and potential activism of the members and their allies.

Preparation:

- Prepare a media statement and fact sheet, and select and rehearse a spokesperson
- Announce the event to members and gain commitments in advance
- Produce and distribute any needed materials
- Notify the media of your presence and purpose

Methods:

- Just attendance without any statement is a small, entry level activity
- Group can sit together as a block or spread out to have a presence throughout the room. Consider which will have the most impact, be comfortable, and provide the best photo op.
- Over crowd the room and demand that the meeting be moved to a larger venue. Try to bring enough people that they could exceed the posted fire code restrictions for the room. If the board agrees to move, then consider going home as the board moves to a large, empty space.
- All members and supporters could be visibly identified through a common color, button, etc.
- Bring papers to correct and stage a "grade in"
- Arrive early and clog the parking lot

Considerations:

- Members who participate may be willing to do something more interactive as a subsequent step.

Category: Board and Administration

Tactic: Speak at School Board Meetings

Description: Bring a crowd of members and supporters to a school board meeting to make public statements in the open forum portion of the meeting.

Preparation:

- Determine appropriate themes and message.
- Select articulate spokespersons. In addition to the usual officers, include members who are not perceived as union activists.
- Provide them with interrelated message outlines.
- Rehearse the speakers and include attention-grabbing quotes and “sound bites.”
- Notify the media. Introduce yourself when they arrive, give background information and fact sheet, point out articulate members and inarticulate board members they could interview.
- Themes may include:
 - The desire for great schools that depend on a great staff and which benefit everyone.
 - Decline in staff morale.
 - Staff turnover, shortage.
 - A call for fairness.
 - False expressions of appreciation from the board.
 - Administrative raises and junkets.
 - Other non-essential district expenditures.

Methods:

- Association speakers attend the board meeting and follow the procedures, if any, to register to speak in the open forum portion of the meeting.
- Speakers should be brief and address common themes.
- Fill the room with members and supporters.
- If members are carrying signs, the signs should coordinate with the message of the speakers.
- Have a supportive parent or community leader speak and call on the parties to reach a fair settlement.

Considerations:

- The board may try to prevent the Association from speaking. This should not be well received, and the spokesperson should challenge the board’s motivation for attempting to silence its own employees, taxpayers and citizens. If Association leaders have previously been allowed to speak, the spokesperson can make a “past practice” argument and ask the board if it is their intention to interfere with the right of a labor organization to represent its

members, or of citizens to exercise the right of free speech. While these may or may not be compelling from a legal standpoint, they may be effective in baiting the board into making any number of foolish public statements. The board ultimately has the right to conduct their own meeting. Subsequent speakers, if any, can rise to yield their time to the designated spokesperson.

- Capitalize on any divisions within the board—target villains and praise supporters.
- Consider whether the bulk of the audience will be supportive. Play to them, the media and the members.

Category: Board and Administration

Tactic: Parents and Community Members Speak to School Board

Description: Supportive parents and community members speak on Association's behalf at School Board meeting

Preparation:

- Identify supporters. Focus on individuals and groups with self-interests that are served by public education and member well-being. Look for articulate and respected individuals within supportive groups.
- Provide supporters with information and fact sheets. Suggest themes for their presentation if they are receptive.
- Weave statements from Association leaders around the statements of supporters.
- Themes may include:
 - The need for labor peace.
 - A call for fairness.
 - The value of education in the life of the community—
Helping children and preparing the leaders of tomorrow.
 - The desire for great schools that depend on a great staff and which benefit everyone.

Methods:

- Supporters speak in public forum segment of school board meeting.
- Supporters call or visit board members to express support for a fair settlement.
- Supportive groups pass a resolution of support for the Association.
- Supporters hold their own forum or press conference to issue a statement of support.

Considerations:

- Select speakers carefully. Don't put people in a powerful spot if you are uncertain as to what they will actually say.
- Outside speakers may drift off message. Be prepared to put forward other speakers who can gently correct the course of the evening.
- Be prepared to give media representatives background information about the speaker.

Category: Board and Administration

Tactic: Carry Signs at School Board Meeting

Description: Members attend school board meeting carrying signs.

Preparation:

- Signs can be on sticks or large placards. Placards work better indoors and picket signs work better outdoors.
- Hand-lettered signs are more personal and are generally more effective than printed signs.
- Members should be informed in advance of the message for the meeting and some starter ideas for slogans should be offered. Members should exercise their own creativity in creating signs themselves.
- The local may want to use materials that are visually consistent with other bargaining campaign efforts, such as shirts, buttons, newsletters, etc.
- Have a sign making party a day or two before the event.
- Prepare to pack the room. A small group with big signs does not send a message of strength.

Methods:

- Members can line the edges of room and remain standing so their signs show. This works particularly well if the area seating is limited or filled.

Considerations:

- Provide members with materials for the signs. The Association should purchase its own materials and should save the receipts to defend against any charge of pilfering district supplies.

Category: Board and Administration

Tactic: Picketing Meetings

Description: A crowd of members and supporters carry signs outside the school board meeting, mediation session, or other appropriate event.

Preparation:

- Prepare signs that convey the Association's message. Signs should be easy to read, easy to carry, and should be able to stand up to weather conditions. Staple guns, water-proof markers, small signs and sturdy sticks are all of value.
- Determine what chanting, if any, will be used.
- Recruit and prepare "marshals" to keep lines evenly spaced, and to move the group as may be needed.
- Select a visible location for the picket line.
- Notify the media and be prepared to offer a message.
- If photographers or TV crews are present, group people for the best shot. Place a large group in a small space, create a long thin line, or if in a large space with a small group, clump them together and hope the photographer goes with a tight shot.
- Have participants arrive early so the line is in operation as people begin to turn up for the meeting.

Methods:

- Give a brief 2-minute orientation and pep talk to picketers before they begin regarding purpose, attitude, conduct and message.
- Keep line in operation until most attendees have entered the building, then move picketers indoors to attend.

Considerations:

- Entering the meeting in a disruptive manner could result in charges of disorderly conduct or disturbing the peace.
- If the picketing involves city streets or sidewalks, a parade permit may be necessary.

Category: Board and Administration

Tactic: Run The Gauntlet

Description: Participants form two lines to create a tunnel through which board members must pass to enter a building or meeting. This is often done when picketing a meeting.

Preparation:

- Same as “Picketing Meetings”
- This tactic can be used at the entrance to a building or in an indoor corridor.

Methods:

- Lookouts should be posted to give notice to the picket captains that the board is starting to arrive. The captains then quickly move participants into the two lines.
- Some groups chant, some stare at board members in cold silence, and others warmly greet the board as they pass by, and others heckle board members or demand a settlement.
- After board members pass through, the lines can file in directly behind them and take positions in the meeting room with their signs.

Considerations:

- Same as “Picketing Meetings”

Category: Board and Administration

Tactic: Media at Meeting

Description: Have a media presence at a crucial School Board meeting. This greatly multiplies the impact of a statement or demonstration because it makes the entire community (or media market) witnesses to the event, whereas statements made only to those in attendance create little or no community pressure on decision makers.

Preparation:

- Select which media you would like to invite. Consider those with an large audience in your community, those with whom you have a relationship, and those best equipped to convey your message (a crowd looks good on TV, and a lone speaker may be best represented in print). Do not rule out those who have an unsympathetic editorial viewpoint. Even a biased article can advance your message, and may alert individuals and other media to come to you for a more accurate take on the facts.
- Prepare a fact sheet or other briefing materials so the reporters can have a written source of facts to use when they prepare their story.
- Look at the location of the event through the eyes of photojournalist. Where should participants be located, how will the lighting be, and what would be the best angle to create the best shot?
- Prepare and send a press release at least 24 hours in advance of the event. The release should include the time, date, and location of the event, as well as a description of what will happen and the perspective and message of the Association. Also include contact data and available times so the reporter can get additional information.

Methods:

- Greet members of the media as they arrive. Give them an overview of the event, where people will be, what they will do, and who will speak. Be concise. Don't tell them how to do their job, but make it easy for them put together a story.
- Provide reporters with a fact sheet or briefing materials. If appropriate, provide reporters with the text of any prepared statement that will be made.
- Introduce reporters to the Association's designated spokesperson.
- Be available during or after the event to answer questions or provide additional background.
- If asked by a reporter who they should speak with from the other side, consider pointing out a board member or administrator who is inarticulate, nervous, ill-informed, or likely to say something inappropriately hostile and inflammatory.
- If possible, consider providing all participants with message palm cards and prepare them to deal with the media. Not only will some reporters grab a few

people at random to interview, but it can be very impressive to if you can invite them to pick *any* of your members to question in addition to the designated spokesperson.

- Be sure the reporters have an opportunity to ask follow-up questions before they leave (they often leave early), and give the contact information in case they want more information before they turn in their stories.

Considerations:

- If the meeting is a closed meeting, inform the press in advance and let them know what they can expect outside. Do not invite the press, then close the meeting yourself—let the board be the party with “something to hide.”
- Always take the initiative in dealing with the press. It is better to play offense than have to react to someone else’s strategy, and it is better that the Association be seen as a source of news than the district.

Category: Board and Administration

Tactic: Candlelight Vigil Outside Of Meeting

Description: Participants hold candles and stand or march quietly outside of building before (and perhaps during) meeting.

Preparation:

- Make sure the location will be adequately dark at the time of the event. Candlelight has little visual impact before dusk or in well lighted areas.
- Obtain candles and lighters. Purchase or create drip shields.
- Check the weather forecast. A breeze will blow out candles and a cold evening can create more discomfort for participants than for the board. Have an alternate plan if the weather is uncooperative.
- Have boxes available to collect candles as participants leave.

Methods:

- Have participants arrive early so the vigil is in operation as people begin to turn up for the meeting.
- Give a brief 2-minute orientation and pep talk to picketers before they begin regarding purpose, attitude, conduct and message.
- It is generally more effective to maintain silence.
- Keep participants spread out evenly. A long line looks better than a bright cheerful clump.
- One to three speakers should enter the building to make state the Association's message and speak about the event.
- The vigil can end shortly after the meeting begins or when the media has left.

Considerations:

- Remind participants to keep open flames away from clothing, hair, paper, dried leaves, etc.
- Have a fire extinguisher on hand.

Category: Board and Administration

Tactic: Contact School Board Members At Home

Description: Members and supporters contact board members at their homes by phone, mail or e-mail to express displeasure and to call for fair treatment.

Preparation:

- Select appropriate time and message for this contact.
- Prepare and distribute the materials mentioned above.
- Select board members who are anti-member or who are key decision makers.
- Distribute list of the board members names, home phone numbers, addresses and e-mail addresses to Association members and supporters. Include talking points.
- Distribute board contact information to parents and supporters, along with a fact sheet.
- Specific board members can be targeted one at a time or all together, and on predetermined dates.
- Have a series of members and community supporters visit the board member at his or her doorstep.

Methods:

- Callers should address themes of fairness, respect and desire or a settlement. They can talk about how they feel about the situation in general, but should not attempt to bargain specific positions.
- Postcards or form letters can be distributed to members and supporters. They can be pre-printed or members can write their own brief messages based on suggested themes.
- Though more expensive, letters might have greater impact if they are sent Certified Mail/Return Receipt so the board member will have to sign for each piece of mail.
- An e-mail campaign can be waged at a specific date and time. Multiple messages, especially if they contain graphics, can overload inboxes.

Considerations:

- Be sure that any mailing meets postal service guidelines.
- Placing calls late at night may have legal repercussions or may solicit sympathy for the targeted board member. Keep in mind that many may now have Caller ID.
- Obscene or threatening messages or graphics may also create legal and public relations problems. Caution members accordingly.
- Spamming or picketing a board member's place of business could alienate an employer or business that the Association may prefer to have as an ally.

Category: Board and Administration

Tactic: Picket Board Members Homes

Description: Set up a picket line in front of the home or business of board members that refuse to work cooperatively with the Association.

Preparation:

- Develop a profile sheet on each board member, including their community affiliations, place of business, income, recent raises, current benefits, etc.
- Determine when the targeted board member returns from work or is likely to be at home.
- Notify the media.
- Obtain information about parking, public v. private property, etc.
- Determine the best parking locations for members. If parking is limited, consider running a minivan shuttle.
- Have picket signs available.
- Inform members and recruit for the event.

Methods:

- Picket a home at a time that will have greatest visibility to board member and his or her neighbors. This will often be when they arrive home from work or on a Saturday morning.
- Picket a business when the board member is at work and perhaps during peak customer or traffic hours.
- Have fact sheets available for neighbors and passers-by.
- Hit several board members at once, or in a random rotation.
- Leave one board member out to create uneasiness and suspicion among his or her peers.
- Consider the candlelight vigil option at a board member's home.

Considerations:

- If picketing a board member's home or business, be aware of regulations regarding parking, noise levels, trespassing, and parade permits. Violating these regulations could turn the event against the Association.
- Be respectful of neighbors, customers and businesses, as they may include or become supporters.
- Weather.
- Dogs and sprinkler systems.

Category: Board and Administration

Tactic: Boycott Board Members Businesses

Description: Encourage members and allies to boycott the businesses of school board members.

Preparation:

- Determine whether the board member owns the business or is an employee.
- Assess the effectiveness of a boycott against the business. Perhaps the loss of revenue or the business owner will pressure the board member to make the boycott end, or perhaps the tactic would alienate allies.

Methods:

- Announce boycott to members and supporters.
- Announce boycott to media, perhaps in a news conference or in front of the establishment itself.
- Invite other unions to participate.
- Encourage the community to join the boycott through leafleting, letters, advertising, etc.
- Distribute leaflets to customers in front of board member's business.
- Place flyers on windshields in parking lot at business.

Considerations:

- Consider whether members of other unions are employed at the business. It would be better to have other unions and their members as supporters.
- If the business is not frequented by significant number of Association or community members, it will not be an effective target for a boycott.
- Take into account local regulations regarding parade permits and solicitation on private property.

Category: Board and Administration

Tactic: Vote Of “No Confidence” In Superintendent

Description: Take a vote of membership on the question “Are you confident in the ability of the superintendent to provide effective leadership for this district.” Publicize the results if the vote is strongly negative.

Preparation:

- Determine whether the target is the decision maker and whether he or she is vulnerable.
- Prepare ballots.
- Prepare BRs or other union officers for the internal local balloting.
- Select or create the proper venue for releasing the information.
- Issue a press release to bring the media to the event without letting them know in advance the result of the vote.

Methods:

- Conduct a legitimate internal vote on the question.
- Do not pre-publicize the election. If the results are inconclusive or do not serve the needs of the Association, it will be better not to have created any media or public expectation of a result.
- If the level of “no confidence” is very high, announce the result of the vote at a public school board meeting or a press conference.

Considerations:

- Follow locals’ constitution and bylaws for taking vote.
- Avoid slander and libel. Board members may be considered public figures, so the Association has a degree of latitude, but must make certain that statements are factual.

Category: Board and Administration

Tactic: Publicize Administrator Salary Increases

Description: Announce the salary increases of the superintendent or other key administrators who may have a role in the bargaining process.

Preparation:

- Obtain accurate information regarding the administrator's previous and current salary, benefits, and other perks (travel, clothing budget, scholarship funds for children, car allowance, etc.). This can be done through a union request for information under 111.70 or an Open Records request under 19.34 *stats*.
- Perform any necessary calculations to create a comparison with the district's offer to union members.
- Using a dollar amount will, in most cases, sound more significant. Since administrator salaries are higher, a small percentage will yield a higher dollar amount than would the same percentage applied to member pay.
- Determine the salary increase of the superintendent, HR director, business manager and prominent administrators.

Methods:

- Release this information through a press conference, through an Association speaker at a board meeting, in fact sheets, and by other means.
- Call attention to any disparity in treatment, value and respect between those who work with children and those who sit in an office and push paper. Make arguments based on equity and fairness. Accuse the district of having misplaced its priorities.

Considerations:

- If the district refused to provide the requested information under 111.70, then ask for it under the terms of the Open Records law. Give them a 48 hour time limit and, if they do not provide it in that timeframe, take a letter to the county District Attorney demanding a writ of mandamus to force compliance.

Category: Board and Administration

Tactic: Publicize Administrators' Junkets and Costs

Description: Almost every administrator goes to winter conferences at distant, warm-weather resorts. Exposing these expensive trips provides an opportunity to challenge district claims that they need to save money, especially if such claims are delivered by an administrator with a suntan.

Preparation:

- Be aware when administrator is scheduled to be absent or suddenly looks tanned and rested.
- Obtain cost information from district financial records, such as monthly expenditure reports.
- Calculate the impact the money spent of the trip might have had were it spent on salaries, supplies, equipment, etc.

Methods:

- Expose administrator travel and its cost publicly at a school board meeting and in the media.
- Link the expense to the impact that money would have had on a member's pay (i.e., "More than enough to fund the annual raise for five members").
- Place travel brochures from the junket's destination in staff rooms. Label the brochures with the administrator's name or attach appropriate information.
- Wear sunglasses and tropical clothing (perhaps at a school board meeting) when the administrator returns so he or she will have an easier transition back to the regular grind.

Considerations:

Category: Board and Administration

Tactic: Members Request To Review Personnel File

Description: All union members have the right, by law and perhaps also by contract, to periodically review the content of the personnel file. These files are usually kept at the district office, though sometimes they may be located at each worksite. Each member can simultaneously submit requests to review the content of their file at the same time and date. Doing so may create a large crowd in the office and make administrators uncomfortable. It may also reveal any adverse documents which have been slipped into members' files and will reinforce the importance of inspecting files.

Preparation:

- Determine location of personnel files.
- Review contract language which may describe any procedures for requesting to inspect the file.
- Select dates for filing the requests and for inspecting the files.
- Quietly communicate details to members.

Methods:

- Members send simultaneous requests to inspect their personnel file in writing or by e-mail, return receipt.
- Members clog parking lot and office as they inspect their files or wait for access.
- Members may want to bring papers to grade and spread out comfortably with their work.
- Members should be somewhat loud and obtrusive, or quiet and sullen, as determined in advance.
- Each member should read every page of every document. Slowly.
- The local may choose to provide forms so members can inventory the date and description of every document in their files.
- A grievance officer should be present to answer questions about documents and make notes regarding any documents which need to be challenged.
- If circumstances warrant, the tactic should drag out as long as possible.

Considerations:

- The district may claim that it only has to provide access at reasonable times and places, that the abundance of requests will be met over an extended period of time. The Association should counter that it is reasonable to grant such requests within 48 hours and any other procedure is a failure to comply.
- There is no need to torment the clerical staff, particularly if they are also Association members or allies.
- Excessive noise or disruption could lead to police intervention. Make sure members behave within reasonable limits.

Category: Board and Administration

Tactic: All Members Request Personal Leave

Description: Some contracts contain provisions for personal leave. If all members simultaneously request leave for the same day, it creates a rush for subs and forces administrators to consider denying requests for leave (which may or may not be allowable by contract). It may also give the appearance that the local is planning a one day strike.

Preparation:

- Review contractual provisions regarding use of leave. Determine whether personal leave is available, how members may apply for personal leave, how much notice they must provide, whether they must pay for their own substitutes, whether there are restrictions on when personal leave can be used, and when or if such notice can be revoked.
- Select a date for which to request leave, the date on which to submit requests for leave to the district, and the date on which to withdraw the requests.
- Prepare a form letter requesting a day of personal leave for the pre-determined date. Alternatively, ask members to write their own letters and do not create a paper trail that easily links the activity to the union.
- Inform members quietly and distribute materials.

Methods:

- Each member simultaneously submits a letter of request for personal leave on the designated date.
- Keep quiet for awhile. Let the administration and perhaps the media wonder for few days.
- Each member simultaneously submits a letter to the district canceling their request for leave.

Considerations:

- Be careful not to end up in a situation in which members are forced to take a leave at their own expense.
- Consider whether the actual mass use of personal leave will be contractually allowable, whether it constitutes an illegal work stoppage, or both.

Category: Board and Administration

Tactic: Mass Requests For Letters Of Recommendation

Description: All members ask their administrators to write letters of recommendation on their behalf. This may irritate administrators, who may in turn pass the sentiment forward to the superintendent and board. It also can communicate the possibility of a mass exodus of members from the district due to dissatisfaction with compensation and treatment.

Preparation:

- Quietly inform the members without creating a paper trail.

Methods:

- All members ask for letters of recommendation on or about the same time.
- The Association may decide to sponsor corresponding events, such as resume writing workshops or job fairs.
- The local may want to start posting lists of job openings in other districts, highlighting higher salary ranges.
- Salary schedules from high paying districts should be left on staff room tables.
- The Association should *not* notify the press, but a subtle leak that a lot of members may be considering leaving may not hurt if it is not traced back to the local.

Considerations:

- This tactic is useful if it creates the impression that many people may actually leave. This can be reinforced by linking the requests to high-turnover rate and below average salaries, if the facts support this argument.
- If the building administrators are not “secondary targets” who pass information and pressure back up the pipe, the tactic may not be effective.
- This tactic may interfere with members who actually *are* planning to leave the district and need letters of recommendation promptly.

Category: Board and Administration

Tactic: Car Signs School Parking Lot

Description: Member cars are islands of personal property in the sea of the school campus. Large signs in vehicles can be used to express a message.

Preparation:

- Decide on the appropriate message.
- Produce sun shades or appropriate signs.
- Determine optimal locations. Parking lots by busy streets are ideal.
- Enlist member support and distribute signs.
- Keep a list of phone numbers or home e-mail addresses to inform members of changes in message, if any.

Methods:

- All cars could have the same message, either on a pre-printed sun shade or on large poster board fitted inside the windows.
- The message can remain the same, or be suddenly changed at the discretion of the local. Regular changes will keep “readership” high.
- A row of cars could be parked together to create a long Burma Shave type of message. Large vehicles of similar height, such as minivans and SUVs, will be the most visible, particularly if their rear windows are used for the display.
- Large plywood signs can be mounted in the back of pickup trucks.
- The Association may also produce bumper stickers or radio antenna flags.

Considerations:

- Avoid statements that could be found to be disruptive or obscene.
- Be sure that there are no firearms, explosives, alcohol or drugs in the cars. Even hidden items could be found in a search or by a police dog.

Category: Board and Administration

Tactic: Post Signs In Staff Rooms

Description: The Association may have language or past practice that allows the posting of union information on designated bulletin boards in staff rooms or other work site locations. Information can be posted which will inform the members, add to the discomfort of the board and administration, and be visible to visitors and parent volunteers.

Preparation:

- Review relevant contract language, past practice, and grievance history.

Methods:

- Post the number of days the local has been working without a contract. Update the number daily.
- Post union bargaining newsletters. The administration intercepts them anyway, so this will not give away any secrets.
- Post the Association's bargaining fact sheet.
- Post articles about negotiations and job actions.
- Post articles about the (larger) raises people have received in other occupations.
- Post charts and graphs showing the members loss to inflation and the continued damage that would be caused by accepting the employer's current proposal.
- Post information about administrative raises and travel.
- Post member-generated editorials and commentary about negotiations.
- Post cartoons and satirical pieces about the board, the administration, and mock their bargaining position.
- If posted materials disappear, post five times as many copies. Also post them in the refrigerator, inside cabinet doors, in the staff restrooms, and other creative places.

Considerations:

- Avoid false defamatory information and libel charges.
- Avoid posting materials that are too far outside the comfort zone of members at their work site.
- Make copies offsite or follow contractual procedures to pay the district for the use of its machines.

Category: Board and Administration

Tactic: Display Resistance at Staff Meetings

Description: Staff meetings are an occasion in which Association members outnumber administrators. There are many ways to be present at a required meeting, fulfill contractual obligations, and register displeasure with the district.

Preparation:

- Review the contract to determine which meetings are required and how frequently they can be held.
- Determine whether the contract requires members to stay to the end of the meeting or till a specific time.

Methods:

- Do not attend voluntary meetings nor meetings held in excess of the number allowed by contract (work to rule).
- If there is a specific time at which the work day ends, all members should rise together (led by the BRs and officers present) and walk out together at the click of the clock.
- File into the meeting in silence, file out in silence.
- Only speak when spoken to. Do not volunteer answers, opinions, or information. Use as few words as possible.
- Bring other work to do and do not look up.
- Decide in advance either to make no eye contact with the administrator or to “stare and glare.”
- Sit with backs to the administrator if seating allows. If seating does not allow, turn the chairs.

Considerations:

- Be careful to avoid charges of insubordination, particularly against probationary members. Do that which is required, but no more.
- The effectiveness of this tactic depends on power and position of the administrator. If the administrator does not influence the superintendent, it may be of little value.
- Gauge the comfort level with these tactics of members at the work site. Pressing people to do something they may see as rude may alienate them rather than build support.

Category: School Board/Administration

Tactic: Demand Financial Data From School Board

Description: This is a way in which you can put the school board on notice that you'll be reviewing their paperwork to find the money they have stashed away due to accounting tricks.

Preparation:

- Request under open records law any and all materials associated with a school district's budget. This information can be requested via a letter to the Superintendent.
- Once the information has been obtained, review carefully the Fund 10 Balance, which all school districts have in their budget. This amount should be roughly 15% of their overall operating budget. Anything more than this amount isn't necessary and can be used in funding your contract.
- Decide how you want to publicize the information contained in the budget. In particular, look for such things as professional development or travel expenses relating to such professional development.

Methods:

- When determining the data, be sure to use the information in a way that supports your situation. For example, you can use the Fund 10 Balance information as an argument to make to your members regarding the district's ability to pay. You can also use the information from the professional development to embarrass the school board.

Consideration:

- It is very time consuming to go through school budgets, and can be very complex. However, look for(perhaps Jeff can add things to look out for)

Category: Worksite

Tactic: Establish Hot-Lines

Description: For this tactic, you would have established a communication structure where you can get information out quickly to your members, and can also allow for a structure that will put in place to let members know about the actions of the school board or Superintendent.

Preparation:

- Prepare your communication structure so that members are able to get information out quickly and efficiently. Use the ICON method to work with members to get them used to getting information out quickly.
- Test your communication structure by sending out a message that requires the membership to respond to what is going on at the table.
- Once you have established the communication structure, when a moment arises that a school board member or the superintendent put their foot in their mouth you can get the information out quickly to your members.

Method:

- This communication structure should be done in a way that one person starts the message and it is short enough that it can be communicated to everyone without the difficulty of having the message be altered in anyway.
- Remember to test the system before you have to use it for a crisis message.

Considerations:

- One of the most important things to do is to be sure that you have reliable members who can get the word out with the ICON system. If it fails during the test run, it is going to fail in times of crisis. Be sure you have it set up to catch the weak links before you really need it.

Category: Worksite

Tactic: Contact OSHA Regarding Health Violations

Description: In the event that there are potential health violations, or safety concerns, you should contact the Department of Commerce, which is the Wisconsin equivalent of OSHA for school employees, to report what potential violations exist.

Preparation:

- In the event that there are health and or safety concerns, it is important that these violations are reported to the proper authorities. In the event that you can make hay with them, through publications and notice to employees of these violations you should take advantage of it.
- Have Building Representatives report any potential violations that may be present. Also, review previous grievance history to find out any other grievances that have been filed regarding working conditions.

Methods:

- Following the visit by DOC/OSHA, have the findings published in the local newsletter. This can also be useful if you are waging your tactics in public, and wish to use some of these violations as testimony to conditions at the school.
- This can also be helpful information to notify parents of potential problems. Obviously, you'll have a natural ally if there are problems.

Considerations:

- Due to reductions in staff, there are very few air quality specialists working with the DWD, and the number of safety inspectors has also been reduced, so be prepared for some delay in having your complaint is processed.
- Depending upon what potential violation has taken place, there are various numbers that employees should call. Below are the appropriate numbers:
 - * Safety & Buildings 262-548-8600
 - * Building Inspection 262-521-5067
 - * Elevator Safety 262-521-5444
 - * Industrial Hygiene 262-521-5187
 - * Safety Consultation 262-521-5063
 - * Occupational Safety 262-521-5189
 - * Indoor Air Quality 414-521-5187 or
608-592-3974
 - * Environmental Protection Agency (EPA)
800-621-8431

Category: Worksite

Tactic: No Oral Communication With Administration

Description: The only communication with the administration should be simple yes and no explanations, unless the conference you are having with administration will impact upon a member's rights.

Preparation:

- For this tactic, you'll have to have a lot of broad support from your membership. It can be something that your members will find very challenging. You may consider having this done one day a week, perhaps on a day when staff meetings are scheduled. It can be a symbolic having members talk only to their co-workers, and not answer the administration.
- Do not continue this tactic if it has any impact on a member's rights. If you are in a discipline meeting, be sure you represent the member completely.
- Consider using only memos to communicate with the administration. This can be time consuming, but is also another way to show displeasure with the administration.
- Always consider your target. If this activity is going to impact an ally, then don't use it against a principal, but perhaps use it against the Superintendent.

Methods:

- When using this tactic, be prepared by having members write out answers to administration questions.
- This can be very challenging when you consider how often members communicate with the administration on a daily basis. It will open their eyes, and undoubtedly, management's eyes when they see how this operates first hand.

Considerations:

- Again, be sure you don't impact on a member's rights to enforce this tactic.
- This tactic may be most effective by doing it for a short period of time, as opposed to every day for a long period of time.

Category: Worksite

Tactic: Encourage Teachers To Leave School District

Description: This tactic can be used to inform both members and the community of the other opportunities that members who used to work in the school district now perform.

Preparation:

- For this tactic, you'll want to get information from teachers who have left the school district and find out why they left, and where they are working now. This can be done to get a historical perspective on the job market but also to use for publication.
- Consider sponsoring a job fair, or take up an advertisement in a job fair publication encouraging prospective employers to contact teachers about employment opportunities.

Methods:

- The collection of data should then be used to publicize what impact teachers leaving the profession have had on the school district. This can be done in an advertisement in the local paper, or in a letter to parents.
- If you decide to do a sponsor an ad at a job fair, offer a resume-writing meeting for all teachers. Publicize the meeting to the administration and the public.

Considerations:

- In the event that this is done, you should be concerned with how this is perceived by not only your members but also by parents. There may be a negative fall-out from some who may see this as defeating education.

SECTION 6

Power Tools



POWER IS THE GOAL

For a group of workers to have collective power on the job, they need participation on three levels:

1. One or more leaders who put thought into what's happening at work, speak up, and propose action.
2. A normally small group of co-workers who work with and assist the leaders.
3. The support of most or all of the rest of the work group.



Building Full Capacity locals

Building Full Capacity Locals

The TSTA has been a leading force in the improvement of public education in our state for more than 125 years. Our mission, to ensure that the education of our students and working environments of our members are of the highest quality, is carried out every day across the state by our local associations.

It should be clear to everyone that strong locals make for a strong TSTA.

Over the past few years, the many challenges that we have had to face at the state level have prevented us from focusing our efforts on local development. We are going “back to the basics” at TSTA and targeting our efforts and our resources toward helping every committed local in the state develop into a full capacity local—one that is vibrant, relevant, strong and dedicated to member service.

We know that strong local associations have the greatest positive impact on TSTA members. Our focus on building and strengthening local associations is now more important than ever before.

What does a full capacity local look like? How is it built and supported? These were the guiding questions we sought to answer during many months of conversations with local presidents, leaders, and staff across the state.

The Power Profile is the product of those discussions. It is a prototype that defines the essential components of a full capacity local. It is a model that staff, local presidents and future leaders can use to measure both the strengths and the opportunities for improvement in their own locals.

The Power Profile highlights nine indicators of a full capacity local that are critical for a local's success—advocacy; communications; a culture of membership; a finance system; internal and external governance; leadership development; association representatives; and political action. The components necessary to achieve full capacity status in each area are listed. The key to success is using the Power Profile to engage in long-range planning

TSTA is committed to providing locals with the support, resources and assessment tools needed to succeed if locals are committed to increasing their capacity for power locally.

There is still much to be done, but the end result should see more members actively involved at the local level, which will, in turn, strengthen local affiliates and our state association.

Full capacity locals DO Impact the Future!

Building Full Capacity locals

Long-Range Planning

Key to the success of any organization is the shared vision held by the leadership team. In a full capacity local, this vision is supported by a well-developed, meaningful long-range plan designed to help the local achieve its long-and short-term goals. Long-range planning and goal setting are driven by the results of member input from focus groups, needs assessments, satisfaction surveys, etc. There is meaningful involvement at all levels by leaders, staff and members. There is a system in place for assessing and modifying the plan and the goals to ensure that they continue to represent the needs of the membership.

The Local Power Profile is a tool for leaders in a Full-Capacity Local to use in long-range planning for building a powerful, full-capacity local. A complete assessment of your local using the power profile will identify which components of the nine indicators need to be addressed in your local's plan. An objective review every year by the local leadership team will show the progress the local is making toward becoming a powerful, full-capacity local.

This document has been developed to provide assistance to local leaders and staff in the planning process. Building an effective long-range plan is essential to becoming a full-capacity local.

Building full capacity locals around the state will be an ongoing and evolutionary process. The goal is to get every local in the state to participate in increasing its capacity to at least some extent.

Building Full Capacity locals

Advocacy: Exclusive Consultation and Member Defense

Advocacy in exclusive consultation and grievance processing, are the core services for which our members pay. In a full capacity local, members have access to the member rights structure and a clear understanding of the role and obligation of their association in the advocacy process. All members have an understanding of the concepts of collectivism and professional unionism as well as knowledge of the local's history. Association leaders are well-educated in the areas of exclusive consultation, advocacy and labor laws and receive ongoing training and updated information. The local's long-range plan addresses exclusive consultation goals as well as plans for ongoing grievance representation and awareness. Local leaders have a good, working understanding of the local school board policies.

The following components are necessary in the development of a full capacity local:

- Training on being an advocate/legal obligations of representation
- Training on handling grievances for the Member Advocacy Team
- Training specifically designed for building reps
- Development of problem-solving skills
- Development and use of member exclusive consultation surveys
- Regular updates for leaders on labor issues/law
- Exclusive consultation training that includes new strategies, techniques and concepts
- Accurate record-keeping and filing system
- Knowledge of exclusive consultation history of the association
- Training on the exclusive consultation process
- Exclusive consultation team training
- Specific strategies for bargaining release time, association days, etc.

Building Full Capacity locals

Communications

A local association cannot succeed, create alliances, or persuade others to support its efforts without a strong communications plan that addresses both external and internal public relations. In a full capacity local, there is a standing communications committee with a well-trained, proactive, creative chairperson. The local's long-range plan contains clear goals for internal and external communications along with a plan of implementation. The leadership team is well-trained in such areas as Web site creation, newsletter writing, communication skills, media relations, and especially message development. Member communication is ongoing, frequent and in many forms. The association is visible in the community, at district functions, and in the local press. Members are provided with numerous, association-organized opportunities to meet together to socialize as well as to receive training and information.

The following components are necessary in the development of a full capacity local:

- Development of local media relationships
- Community familiarity with the association and its activities
- A regularly published member newsletter in electronic or paper format
- Training for communications committee in the development and implementation of an internal and external communications plan
- Local Web site design training
- Message development training
- Media training
- Regular use of the TSTA Web site
- Utilization of e-mail as a communications tool
- Regular use of tsta.org and nea.org by leaders
- Planning of member social functions
- Communications with new members
- Specific PR training for local presidents
- Development of leaders' communications skills
- Training on how to write op-ed pieces/letters to the editor

Building Full Capacity locals

Culture of Membership

A strong, relevant local depends on a steady influx of new energy and new ideas. A full capacity local recognizes this and has, as a part of its long-range plan, goals for the ongoing induction of new members. New members are provided with opportunities such as mentoring and induction, training and workshops designed to address their specific concerns, leadership opportunities, and organized social opportunities. There are ongoing opportunities for new members to provide feedback and voice concerns to the leadership team. New members are encouraged to get involved in meaningful association roles and are provided with the necessary training and information to ensure successful and continued involvement in the association.

The following components are necessary in the development of a full capacity local:

- Mentor program for new members
- Development of new member materials
- Planning and implementing new member activities
- Orientation of new members
- Specific PR program designed to target new members
- New member focus groups
- Meaningful association involvement in district mentoring program
- Local association involvement with student/intern teachers
- Association presence at job fairs
- Identification of specific new member issues for addressing with administration
- Association-sponsored professional development opportunities for new members
- Adequate resources available to fund new member participation in TSTA conferences
- Leadership opportunities and training specifically for new members
- Recognition of new members and their accomplishments

Building Full Capacity locals

Financial Systems

Accurate and well-maintained financial and membership records are essential components of a well-run organization. A full capacity local has clear and effective provisions for collecting membership information, appropriate record-keeping, accountability, and checks and balances. Such a local has a standing budget committee and a well-trained treasurer who has a clear understanding of the budget process, dues collection and transmittal, applicable tax laws and who clearly communicates this information regularly to the local leadership team. Development and passage of a budget is a yearly activity, and the budget reflects the long-and short-term goals of the local.

The following components are necessary in the development of a full capacity local:

- Keeping accurate membership records
- Knowledge and utilization of the TSTA membership system
- Treasurer training on budget development, compliance with laws, accurate accounting procedures, collection and transmission of dues, how to develop a monthly treasurer's report, etc.
- Yearly local audit/audit committee training
- Development of a system of checks and balances
- Training on how to establish local dues levels and dues increases, etc.

Building Full Capacity locals

Governance: Internal and External

For a democratic organization to run efficiently, there are fundamental governance structural requirements that need to be in place. In a full capacity local, these include a regularly updated constitution and bylaws as well as clearly defined roles and responsibilities for leaders, staff and committees, which are communicated to all members. Association meetings are regularly scheduled with established agendas and run according to parliamentary procedure.

The following components are necessary in the development of a full capacity local:

- Knowledge and understanding of the local's constitution and bylaws
- Training on conducting a meeting, developing an agenda and yearly calendar, organizing information
- Specific training on parliamentary procedure
- Established grievance system with training
- An up-to-date handbook for building reps
- Ongoing, relevant building rep training
- Clearly established roles and responsibilities for standing committees
- Training for committee chairs
- Leadership team training
- Regular update of governance documents
- Regular schedule of meetings
- Development of materials to support presidents in their role of scheduling and chairing meetings

Building Full Capacity locals

Leadership Development

A knowledgeable, well-trained leadership team is critical in order to meet the needs of members. A full capacity local is led by a group of strong, committed leaders (including elected officers and appointed committee chairs) and TSTA staff who work together to achieve the goals of the local organization. These leaders are well-educated, proactive and responsive to member needs. Key leadership positions are clearly identified and expectations are clear, shared and balanced. The leadership team is diverse and is willing and able to commit adequate time and energy to the goals of the local. The leadership team has a shared vision of the local organization along with a clear mission and a proactive long-range plan as well as short-term goals and priorities.

The following components are necessary in the development of a full capacity local:

- An understanding of leadership styles and leadership responsibilities
- An understanding of TSTA Structure and resources
- Knowledge of TSTA and NEA history
- Mentoring for new leaders
- An understanding of the role and responsibilities of the Area Organizing Staff in assisting and advising the local
- Release time/association days for local leaders
- Opportunities for leaders to meet to share ideas and concerns
- Group training for elected local officers as a "leadership team"
- Special opportunities for training and support for leaders of small locals
- Identifying and developing emerging leaders
- More thorough and updated training in all areas for local leaders
- Diversity training for all leaders
- Leadership participation in TSTA and NEA

Building Full Capacity locals

Association Representatives

Knowledgeable, well-trained Association Representatives (AR's) are essential to the growth and development of the local association. In a full-capacity local, AR's are the "face" of the Association in the work site. The AR is often the first exposure to the Association for new employees. AR's are the recruiters, advocates, and communicators at the site level for the Association. Full-capacity locals ensure that all work-sites have AR's who are leaders, well-informed, and well-trained to fulfill the appropriate responsibilities.

The following components are necessary in the development of a full capacity local:

- An understanding of Association Representative responsibilities
- Training for Association Representatives on their responsibilities annually
- Association Representatives recruit new employees in their work-sites
- Association Representatives advocate for the Association and for members
- Association Representatives communicate with members and potential members
- Association Representatives are well-informed
- Association Representatives have a basic understanding of employee rights
- Association Representatives have problem-solving skills

Building Full Capacity locals

Political Action/PAC

Every decision that impacts public school employees is made by an elected or appointed government official. In a full capacity local, political action is an ongoing and integral part of the local's long-range plan. There is a continuous commitment to community coalition building including joint ventures with district and community stakeholders. The leadership team and the TSTA staff who work with the local are actively engaged in the political process at the local, state and national levels and assume the responsibility for keeping members accurately and regularly informed on all political issues of importance. The governance structure of the local includes a standing political action committee headed by an active, well-trained chairperson. The local is fully involved in activities such as the TSTA Continuing Contributor PAC drives, local screening and recommending committees, and lobbying. The local leadership team members as well as the building representatives are well-trained to carry out the political goals of the local/state associations at the building level.

The following components are necessary in the development of a full capacity local:

- Local training for the candidate screening and recommending process
- Member awareness of local/state/national issues
- Familiarity and communication with school boards, community and parent groups
- Specific ESP training on political action and PAC
- Clear local screening and recommending guidelines
- Regularly updated PAC materials from TSTA
- PAC training for all building reps
- A leadership team committed to PAC
- Lobbying training for members
- Local involvement in TSTA PAC activities
- Programming to keep members involved in political action year-round
- Support for local coalition building and joint ventures for the local and the district

Enhanced utilization of Web-based means of communicating political information

Building Full Capacity locals

FULL-CAPACITY PROFILE FOR TSTA LOCAL ASSOCIATIONS

Name of Local _____ Region _____

School District(s) _____

Members, as of _____

Active _____ ESP _____ Life _____ Total _____

Potential in 05-06:

Market Share:

Teachers _____ ESP _____ Total _____ Teachers _____ ESP _____ Total _____

Compliance: Constitution/Bylaws on file _____ Yes _____ No

05-06 partial _____ full _____ 04-05 partial _____ full _____ 03-04 partial _____ full _____ 02-03 partial _____ full _____

Number of Buildings in District _____ Local Dues Amount _____

ARs:

Number _____ Members per AR _____

Continuing Contributors:

Number _____ Percent of Members _____ Total Contributions _____ Per memb _____

On the following pages you will find a list of local expectations in nine (9) different categories called indicators. In each category, place a checkmark in front of each numbered item that is true of this local. Summarize below.

	Highest Marked	Lowest Unmarked	Total Marked	out of Total Number
Advocacy	_____	_____	_____	<u>17</u>
Communications	_____	_____	_____	<u>13</u>
Membership	_____	_____	_____	<u>19</u>
Finance	_____	_____	_____	<u>14</u>
Internal Gov	_____	_____	_____	<u>24</u>
External Gov	_____	_____	_____	<u>18</u>
AR	_____	_____	_____	<u>9</u>
LD	_____	_____	_____	<u>13</u>
Pol	_____	_____	_____	<u>15</u>

Building Full Capacity locals

Indicator 1

Advocacy: Member Representation, Exclusive Consultation

	1	Members are referred to the Help Center
	2	Some attempt is made to ensure that members are aware of Help Center unless Local is handling member representation
	2	The local president or designee attends some School Board meetings
	3	Someone in the local regularly attends School Board meetings
	3	This local makes annual salary presentations to the School Board
	3	The Local provides representation of some members, working with Help Center, unless Local is handling member representation
	4	This local makes presentations to the Board on issues other than salary
	4	The president or designee meets occasionally with administration
	4	This local has established a cadre/committee to be trained for representing members (unless Local is handling member representation)
	5	The president or designee meets regularly with administration
	5	This local has the ability to influence some Board decisions
	5	This local has a trained cadre/committee representing members on most issues, using the Help Center as consultants, unless Local is handling member representation
	6	This local handles member representations until a Lawyer is required
	6	This local develops and implements plans to lobby/influence Board and administration
	6	This local has proposed a local consultation policy to the Board
	7	This local has secured an Exclusive Consultation policy in the district
	7	This local is recognized as the Exclusive Consultant

Building Full Capacity locals

Indicator 2

Communications (Internal and External)

	2	This local has at least some communication with members
	3	This local communicates with members occasionally
	3=	This local has occasional contact with local media – if only letters to editor
	4	This local regularly communicates with members
	4	This local has a communications committee to handle the local communications plan
	4	This local has well developed local media relationships
	4	This local plans and conducts member social functions
	5	This local utilizes email as a communications tool
	5	The local plan includes good internal communications plan and at least rudiments of external media plan
	6	This local has the ability to communicate with members and get a response – move members to action
	6	This local engages in Community outreach and involvement
	6	The Local plan includes complete external media plan
	7	This local is recognized in the community as a leader in Education

Indicator 3

Culture of Membership

	2	The local distributes TSTA/NEA materials to members
	2=	The local recruits new members at a New-Employee orientation hosted by the district
	3	The local recognizes and welcomes new employees to the district
	3	The local directs resources toward membership recruitment
	3	The local has a Membership chair/committee in place
	3	The local provides an association sponsored professional development opportunity to new members at least once per year
	3	The local includes new members on committees
	3	The local recognizes/thanks members at least once per year
	3	The local recognizes publicly the accomplishments of members
	3	The local ensures that members are aware of the NEA/TSTA Member Benefits opportunities
	4	The local communicates with new employees prior to the beginning of the year
	4	The local has a complete membership recruitment/retention plan
	4	ARs in this local recruit new members at their work sites

Building Full Capacity locals

	4	The local provides materials/packets to all new members
	5	The local has a process for ensuring that all potential members are asked to join
	5	The local provides association member "mentors" for new members
	6	The local conducts new member orientations for new members
	6	The local operates in "campaign mode" during either the fall or spring campaign
	7	The local operates in "campaign mode" during both the fall and spring campaigns

Indicator 4

Finance, Local dues and Budget

	2	This local charges local dues
	2	This local operates with a local budget
	2	A leader other than person with check book reviews finances in this local
	3	Local dues in this local are above \$10
	3	Regular financial statements/Treasurer's Report are presented to Board
	3	The Budget is reviewed/approved by the Board or other governance body
	4	Local dues are above \$25
	4	The Treasurer attends TSTA Business Center training for Treasurers
	4	This local's financial reports are based on the local budget
	5	Local dues are \$50 or more
	5	The local's budget is tied to the local plan
	5	Financial reports are based on the budget and tied to the local plan
	6	An Audit committee reviews and approves the local's finances
	6	Local dues are sufficient to fund the local plan, preferably tied to average salary

Indicator 5

Internal Governance

	1	This local has a President or Contact Person
	1	This local has a current Constitution or Bylaws
	1	This local files all Compliance documents occasionally
	2	This local files all Compliance documents at least half the time
	2	This local elects officers beyond President or Contact
	2	This local holds some Board or group meetings
	2	This local makes some attempt to seek input from other members

Building Full Capacity locals

	3	This local's constitution has been updated/reviewed within the last 5 years
	3	This local holds regular Board meetings
	3	This local has a regular election of officers with full slate of officers
	3	This local is in full compliance most years
	3	This local has a Membership chair/committee in place
	3	This local seeks diversity (ethnicity and job categories) of involvement in governance
	3	Some elements of local planning, including some assessment of member needs exist in this local
	4	Leaders in this local have a good understanding of the constitution/by-laws
	4	Leaders in this local understand the responsibilities that accompany their positions
	4	This local engages in a planning process, with staff assistance, based on regular assessment of members' needs
	4	This local has a complete membership recruitment plan
	4	This local plans and strives for diversity (ethnicity and job categories) in the Governance structure. Job categories means not just ESPs and Actives, but bus drivers, custodians, etc. and librarians, nurses, counselors, etc.
	4	This local is in full Compliance every year
	5	This local maintains a solid local plan, developed through a process that includes regular assessment of members' needs and staff assistance
	5	This local effectively uses committees and or/task forces
	6	This local ensures and achieves diversity (ethnicity and job categories) in Governance structure
	6	This local achieves its goals

Indicator 6 **External Governance**

	1	This local attends a Regional BoD at least once a year
	2	This local sends an occasional Delegate to Regional and/or TSTA HoD
	3	This local regularly attends Regional BoD meetings, training & other activities
	3	At least one person from this local attends TSTA Educational Issues Conference
	3	This local elects Delegate(s) to Regional HoD every year
	3	This local elects Delegate(s) to TSTA HoD every year

Building Full Capacity locals

	4	This local recommends members to the state President for appointment to statewide committees
	4	This local hosts an occasional TSTA/NEA training/workshop for local members or attends at regional training/workshop
	4	More than one person from this local attends TSTA Educational Issues Conference
	4	This local sends at least one new person each year to at TSTA conference
	4	This local elects a full delegation to Regional HoD and TSTA HoD, most attend
	4	This local elects a Delegate(s) occasionally to NEA RA, if eligible for local delegate(s), or through a Local Cluster
	5	This local hosts at least one TSTA/NEA training/workshop a year for local members
	5	This local sends a full delegation to Regional, TSTA HoDs
	5	This local sends attendees occasionally to NEA Conferences, e.g. Western Region Leadership Conference, National ESP Conference
	5	This local elects a full delegation to NEA RA, most attend
	6	This local sends a full delegation to NEA RA

Indicator 7 AR Structure

	2	This local has some ARs, if more than two buildings
	3	Depending on number of buildings, this local has enough ARs to warrant AR meetings, some training
	4	This local has ARs in half of buildings, some trained, occasional AR meetings
	4	This local recognizes and/or rewards ARs
	5	This local has trained ARs in at least half the buildings, regular AR meetings
	5	The local plan includes recruitment, training of ARs, with training offered annually
	6	This local has trained ARs in at least three-fourths of buildings
	6	The local holds AR training/orientation every year with majority of ARs attending
	7	This local has trained ARs in all buildings, extras at ratio of 1 for 25 members, with appropriate attention paid to including various constituencies – e.g., different job categories of ESPs and non-classroom teacher professionals

Building Full Capacity locals

Indicator 8

Leadership Development/Training

	2	At least one person occasionally attends TSTA/AOT Leadership Training for leadership skills
	3	At least one person attends TSTA/AOT Training Conference when offered, others at least occasionally
	3	This local nominates at least one local member for Ambassador Academy
	4	More than one person attends TSTA/AOT Leadership Conference when offered
	4	This local conducts occasional local leadership training
	4	The local plan includes some element of identifying and involving potential leaders
	5	Officers and others attend the TSTA/AOT Leadership Training when offered
	5	Emerging leaders attend appropriate leadership training yearly, e.g., Ambassador Academy
	5	The local actively recruits new leaders into active participation in local governance, paying attention to diversity of ethnicity and job category
	5	There is training in the local at least every other year for leaders/potential leaders
	6	This local hosts at least two TSTA/NEA training workshops a year for local members, either alone or with neighboring locals
	6	All officers have been through leadership training
	6	The local plan includes elements to ensure active participation of new leaders in local governance, paying attention to diversity of ethnicity and job category
	7	The local conducts a retreat/training/planning session for leaders every year

Indicator 9

Political Involvement

	2	At least some members in this local respond to TSTA requests for legislative contact
	3	At least one member in the local attends some TSTA political/legislative training
	3	The local has some participants in the legislative interview process
	4	The local engages in some School Board election involvement – sponsors forums or meets with candidates
	4	Members respond regularly to TSTA requests for Legislative contact and

Building Full Capacity locals

		for Legislative Cadre members
	4	There is some response to TSTA requests for political involvement/campaigning
	4	The local occasionally solicits continuing contributors for TSTA-PAC
	5	The local is regularly represented at TSTA political/legislative training
	5	The local has an established interview process for School Board races, recommendation/endorsement, and does some campaigning
	5	There is some local involvement/success in local and legislative elections (beyond response to TSTA efforts)
	5	The local solicits continuing contributors for TSTA-PAC at least annually
	6	The local plan includes regular solicitation of continuing contributors for TSTA-PAC
	6	Local members are involved through the Local in legislative campaigns
	6	The local is fully involved in School Board races/candidates seek support of Local
	7	The local identifies, recruits and elects school board candidates



EXERCISE: SKETCH OUT A MEMBER NETWORK

Go back to the workplace map you created. Can you start to see who would make good volunteers and who their assigned contacts would be? Think of the natural leaders, and of people who could be brought along with some training. Consider how to cover all the work groups and social groups.

Make up a first draft of a member-to-member network for your department or workplace. It's only a draft, of course. You will need to do the slow work of getting buy-in from the volunteers, and they will have their own ideas of who they want to stay in touch with.



TAKING THE CONVERSATION ONLINE

Here are a few ways organizers have used online tools:

VIRTUAL BREAK ROOM

An email list or Facebook group can be a forum to discuss issues, share information, draw up plans, and make contacts—off the clock and away from the boss.

Cafeteria Workers at the ABC School District communicated through a secret Facebook page when they were discussing sensitive contract negotiation provisions. The online activities complemented an energetic on-the-job campaign that forged "foodidarity" through actions such as sick-outs.

"The Facebook page allowed us to answer questions about unions, address gossip at the zoo, announce organizing meetings, and later to respond to anti-union rumors that crept into the workplace," said Matt Ellison, part of the organizing committee.

CONNECTING ISOLATED WORKERS

Email and Facebook can allow information-sharing and discussion among people who don't regularly see each other on the job.

Educators at California Virtual Academies, who work from home teaching online classes, used three Facebook groups to communicate during their organizing drive. One group, the "CAVA Water Cooler," offered a place to socialize, share stories, and vent. The second group was for supporters. The third was a private meeting space for the organizing committee to plan.

The 40-person committee also met regularly through a videoconferencing app called Zoom. But the educators met in person several times, too. "Nothing's going to replace actually seeing each other," said member Cara Bryant.

NETWORKING BETWEEN LOCALS

After teacher locals in a northern corner of Washington state organized one-day strikes against school underfunding, the "Badass Teachers" Facebook page helped the activity go viral. Soon, locals representing half the teachers in the state joined the strike wave.

Bus drivers in a Florida school district who were on the verge of being privatized used Facebook to make contact across other states and to find out how they pressured their districts not to contract with private bus vendors. The bus drivers used this critical information to demonstrate to the district why it was better to keep transportation in-house; the bus drivers were able to keep their jobs.

RANK-AND-FILE RESISTANCE

Machinists Local 751 member Shannon Ryker started the "Rosie's Machinists 751" Facebook page to rally Boeing workers against mid-contract concessions their International was pushing.

Though the contract narrowly passed, the page became the seed for a new caucus. Union dissidents such as rail workers, auto workers, and carhaulers stay in touch through email lists, conference calls, Facebook groups, and occasional in-person meetings. These methods helped Chrysler workers pull off a 2-to-1 "no" vote on their national contract in 2015, forcing bargainers back to the table to make improvements.





REMEMBER THE BASICS

As you move through your organizing plan, keep these principles in mind:

TALK ONE ON ONE

Listen to what your co-workers are saying. Share your own ideas. Don't just gossip or gripe—help create a focus about problems that can be solved.

ENCOURAGE CONFIDENCE

You and your co-workers may feel scared or hopeless. A calm and confident attitude helps. Remind people what will happen if they do nothing. Help them draw on their righteous indignation instead of their fear.

CHALLENGE AUTHORITY

Organizers don't need to demonize the boss. We do need to encourage people to question authority and stand up for each other. Figure out how to confront the people in power.

RECRUIT GOOD LEADERS

Take note of who is naturally respected and encourage them to take on leadership. Look for each person's talents and find ways to use them. Don't let the whiners set the tone.

IDENTIFY COMMON PROBLEMS AND SHARED HOPES

We organize to bring people together. Talk and listen until you've found a problem that matters to lots of your co-workers. Share what you've heard.

ORGANIZE DEMOCRATICALLY

Include everyone who is, or might be, affected. Reach out beyond your friends and the people most like yourself. Solicit opinions and involve as many people as possible in decisions. Find a role for everyone.

SET CONCRETE GOALS

Goals should be specific. State clearly what a victory would be. Make sure the majority of people share this goal.

GET PEOPLE MOVING

Even simple collective activity is better than just talking. Action breeds commitment. Circulate a petition. Wear buttons. Develop plans that involve small steps. Each step should slowly increase the visibility and strength of the group.

STICK TOGETHER

As long as an action is collective, you won't leave individuals vulnerable. Design activity that brings people together. Send a group to talk to the boss. Write a letter that everyone signs.

NO SHORTCUTS

Resist the temptation to do it all yourself, or to shoot out an email and consider your co-workers informed. Even if it seems inefficient at first, getting more people involved is the only way to keep things going over the long run.

TURN UP THE HEAT

Start with small actions that will probably succeed. With new confidence, people will be inspired to take bigger and riskier steps.

EVALUATE AS YOU GO

Keep talking one on one and in groups. Assess whether your goals are still correct and clear. Evaluate whether new plans are needed.

ORGANIZATION IS EVERYTHING

Your organization doesn't need to be too formal, but it does need to get the job done. If you have a phone tree, you're well on your way. Organize social get-togethers, too.

EYES ON THE PRIZE

Step back, look at the big picture, and don't let setbacks discourage you for long. Remember you're part of a much bigger movement. Pass the torch along to the next generation.



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

NAME _____

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:



[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		<input type="checkbox"/> Get NEA Mobile Alerts <small>Msg & data rates may apply. 4 msgs/month.SMS terms at nea.org/terms.</small>	
PERSONAL EMAIL			
HOME ADDRESS			
CITY		STATE	ZIP CODE
POSITION <input type="checkbox"/> Clerical Service <input type="checkbox"/> Custodial & Maintenance	<input type="checkbox"/> Food Service <input type="checkbox"/> Health & Student Service <input type="checkbox"/> Paraeducators <input type="checkbox"/> Security Services	<input type="checkbox"/> Skilled Trades <input type="checkbox"/> Technical Service <input type="checkbox"/> 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



[Logo placed here]

[Logo placed here]

Official
Use ONLY:

Leader ID

Worksite ID

NEA Officers

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President

Rebecca “Becky” Pringle
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Shelly Moore Krajacic, *Wisconsin*

George Sheridan, *California*

Earl Wiman, *Tennessee*

NEA Executive Director

John C. Stocks

The NEA Education Support Professional Quality (ESPQ) department has many additional resources for ESP members. Click on www.nea.org/esp for everything NEA offers for ESP careers.

