

SECRETS OF A SUCCESSFUL ORGANIZER



TRAINER'S GUIDE

Adapted for the National Education Association Center for Organizing

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LABOR NOTES • *labornotes.org*

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Adapted for the NEA Center For Organizing, June 2018



Organizing at NEA

The NEA—in response to the relentless threats to public education, public employees, students, and communities—is partnering with state and local affiliates to build an Association-wide culture of organizing. Our goal is to build on our legacy of advocacy and leading the professions, fight for our mission of great public schools for all students, and grow sustainable, strong NEA affiliates for the future.

A culture of organizing is one that promotes deep member engagement, leadership development, and collective action. At its core, organizing means facilitating collective action among a group and empowering others to take on leadership roles.

A culture of organizing is an intentional and strategic approach to the work of the Association: one that relies on data analytics, thoughtful planning, accountability, and continuous improvement.

The NEA Center for Organizing measures successful organizing through multiple lenses: robust member engagement, effective distributive leadership structures, and growth in membership. We seek to build these capacities through organizing campaigns built around the issues important to our members. Many different organizing strategies can lead to success; nonetheless, all authentic organizing is accountable for measurable goals and outcomes.

Above all, we believe in leading with vision and aspiration, accompanied by concrete programs and plans. Effective organizing—which is what we all strive for—should result in increased member engagement of significant numbers of educators, expanding leadership, and real wins in the policies and practices that impact our members, our schools, our students and our communities—grounded in our values of equity, opportunity, and racial justice.

This guide is one of a number of resources the NEA Center for Organizing makes available for affiliate leaders and staff. For additional resources go to www.NEA.org/C4O.

Acknowledgments

A training, like an organizing campaign, is a group effort. Though only three names appear on the cover, in truth the rest of the Labor Notes staff helped to write and assemble what you hold in your hands:

Al Bradbury, Dan DiMaggio, Adrian Montgomery

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About the Publisher

Labor Notes is a media and organizing project that since 1979 has been the voice of union activists who want to put the movement back in the labor movement. Through its magazine, website, books, schools, and conferences, Labor Notes brings together a network of members and leaders who know the labor movement is worth fighting for. Visit our website at www.labornotes.org.

Reprints

Permission is granted to NEA affiliate workplace activists, rank-and-file members and leaders, staff, and affiliated organizations to reprint sections of this training guide for distribution. For additional materials or any questions, contact Labor Notes at training@labornotes.org, 718- 284-4144, or the address below.

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INTRODUCTION

This guide shows how to put on a three-part training that teaches rank-and-file educators how to build power on the job, step by step.

This training is designed as a companion to the Labor Notes book *Secrets of a Successful Organizer*, available for individual or bulk orders at www.labornotes.org/secrets.

The guide includes:

- Icebreakers, closing activities, suggested ground rules, and an example day-long training agenda
- Training curriculum
- Handouts
- Case studies

The trainer's notes for each workshop tell how much time to spend on each component and what is required to prepare for the workshop, and provide instructions for the training itself.

Parts in normal font are the training script and are intended to be spoken out loud.

Parts in *italics* are directions to the trainer.

Parts in **[Bold brackets]** are advice for the trainer.



HANDOUTS



KEY POINTS



**REAL LIFE
STORIES**



POSSIBLE CUT

All the handouts are also available online at www.labornotes.org/secrets. Many of the materials are also available in Spanish, as is the book, at www.labornotes.org/secrets.

LABORnotes

Some points for trainers:

Organizing is for everyone. This curriculum is aimed directly at union members, but it is useful for a much broader audience. Many organizations, even those not specifically focused on workplaces, will find these organizing lessons useful. A version of this training adapted for worker centers is available in Spanish. Please contact Labor Notes with any questions.

Train together. Organizing isn't a solitary activity, and neither is labor education. Trainers do best when they train together, providing support and feedback. If you or your union are interested in a training of trainers, please call Labor Notes at 718-284-4144 or email training@labornotes.org.

Rank-and-file experiences front and center. In our monthly magazine and in our trainings, Labor Notes strives to put the experiences, creativity, and expertise of workers at the center of what we do. While the skills and techniques in this training guide might be new to many union members, they are hardly new to the labor movement. The fundamentals of organizing taught here arise from the hard-won knowledge of generations of workers. The best way to teach these skills is by creating space for participants to share their own experiences and draw connections.

All teachers, all learners. One of the principles underlying this training is that we are all teachers and we are all learners. Please feel free to modify, edit, add to, and play with this material so that it fits your style, your needs, and your approach. If you develop a new exercise, have a suggestion, or get stuck, please reach out to Labor Notes. We would love to hear from you.

Well begun is half done. Each workshop contains a checklist of required materials and actions you should take to prepare beforehand. Use this list to make sure you are on track to a successful training.

Pace yourself. Each workshop contains a time breakdown at the very beginning. Before the workshop starts, write down the exact time that you should begin each part. This will help you to keep track of your pace and to decide if you need to make changes to get back on schedule.

Thank you. Like everything we do, this guide is the collective effort of many people. We would like to thank everyone who provided feedback.

EXAMPLE DAY-LONG TRAINING AGENDA

9:00 – 9:30	Food, logistics, trainer intros, ground rules
9:30 – 11:30	Beating Apathy – 2 hours
11:30 – 12:15	Lunch – 45 minutes
12:15 – 2:15	Assembling Your Dream Team – 2 hours
2:15 – 2:30	Break
2:30 – 4:30	Turning an Issue into a Campaign – 2 hours
4:30 – 5:00	Closing

The training curriculum is broken down into three workshops that can be offered individually or as one day-long training with three parts below. It can also be expanded to a day and a half or two-day training with additional Bonus material included.

PART ONE: BEATING APATHY

Are you beating your head against the wall trying to get people involved? This workshop is for you. Hear success stories about how others have turned their workplaces around and turned apathy into action. Learn practical organizing tools for engaging your co-workers, taking action, and getting results.

PART TWO: ASSEMBLING YOUR DREAM TEAM

Your workplace may feel like an unorganized mess, but the truth is you're not starting from zero. There's organization there already—though it might have nothing to do with the union. Learn how to map out the existing networks in your school site, identify the leaders in those networks, and then knit them together into an organizing committee.

PART THREE: TURNING AN ISSUE INTO A CAMPAIGN

Everybody has complaints and frustrations, but an organizer has the skills to turn problems into opportunities. Learn how to sort the issues you hear from co-workers, bring people together, and make an escalating plan to solve the problem.

GROUND RULES

As a facilitator, your responsibility is to the group and group learning. Innumerable issues can arise in a training, but the question should always be: what does the group need? To help deal with unexpected developments, spend some time laying down ground rules at the start. Ground rules are a group agreement that can be used to help set expectations and then returned to as a guide for behavior.

Here are some examples of ground rules you might want to include:

One Mic

Only one person speaks at a time. No side conversations.

Land the Plane

Get to your point quickly! *(can be paired with a hand gesture of a plane landing)*

Take Space, Make Space

We want everyone to contribute, so after you speak up, wait for everyone else to have an opportunity to speak before speaking again.

Alphabet Soup: No Acronyms!

If someone says an acronym, immediately ask “What’s that?” (e.g. “COPE” = Committee on Political Education, the union’s voluntary political action fund)

Confusion Clapping

If someone doesn’t understand a term or acronym, they yell out “I’m confused!” and the room cheers them (heartily but quickly) before the facilitator addresses the point.

“What Happens in Vegas, Stays in Vegas!”

Let’s keep what happens at the training and what people say confined to the training. Feel free to share all the great lessons and ideas with others, but don’t reveal personal details that others share with the group.

Parking Lot

Keep a running list of ideas, issues, or concerns that get brought up but can't be directly addressed for reasons of time. Facilitators can then try to follow up if time allows or at another time.

Respect the Agenda

Let's stick to task and to time (*can be coupled with parking lot*).

"I" Statements / Speak from Your Own Experience

If you are giving your opinion or expressing a feeling, then try to use "I" statements to avoid assuming that others think or are feeling the same. Speak for yourself!

Be Curious

Listen to understand, not to defend.

Assume Good Intentions

We are all brothers and sisters, even when we disagree.

No Distractions!

Please silence your phones and put them away.

SECRETS OF A SUCCESSFUL ORGANIZER

PART 1: BEATING APATHY



UFCW Local 400 (CC BY 2.0) bit.ly/10Sm397

PART 1: BEATING APATHY

Total active workshop time: 2 hours

- Introduction/Icebreaker: 10 minutes
- Aim for the Bullseye: 5 minutes
- How Do We Currently Solve Problems?: 15 minutes
- How the Boss Keeps Us Disorganized: 20 minutes
- How to Identify an Organizing Issue: 5 minutes
- How to Have an Organizing Conversation: 65 minutes
 - How to Be a Good Listener: 5 minutes
 - AHUY: 5 minutes
 - Practicing Asking Questions: 10 minutes
 - Types of Questions: 5 minutes
 - Inspiring Hope, Creating Urgency, and Calling the Question: 5 minutes
 - Example Roleplay: 5 minutes
 - Roleplay: 15 minutes
 - Debrief Roleplay: 5 minutes
 - *BONUS ROUND* Answering Tough Questions and Inoculating: 10 minutes
- Review

Setup (before the workshop starts)



- ☐ Have packets prepared for participants with all the handouts:

- Aim for the Bullseye
- How the Boss Keeps Us Disorganized
- A Good Organizing Issue
- How to Be a Good Listener
- AHUY: Developing a Rap
- Answering Tough Questions
- Inoculate Your Coworkers Against the Boss's Tactics
- Optional: Exercise: Track Your Victories



- ☐ **How Do We Currently Solve Problems:** Find a workshop participant who can share a strong example of how they and others took collective action to solve a workplace problem. Prepare them to describe the steps they took to get their co-workers involved and what action they took together.

- ☐ Make four paper signs with the labels listed below and tape them up in four corners of the room so there is a different corner for each way the boss disorganizes us:

- Fear
- Hopelessness
- Division
- Confusion

- ☐ Have a poster-sized copy of:

- Aim for the Bullseye on the wall, covered.
- How the Boss Keeps Us Disorganized on the wall, covered.



- ☐ **Roleplay:** Find a workshop participant who can demonstrate the AHUY organizing conversation, playing the role of organizer. Prepare them to lead the demonstration during this section. The goal is for them to get to an “ASK.”

- ☐ Supplies:

- Flipcharts
- Markers
- Tape

ICEBREAKER (10 MINUTES)

Icebreaker

This exercise should take 10 minutes if performing the short version of the “Who Does the Work in the Union?” opener after ground rules. This means adding 10 minutes to the workshop.

If performing the day-long workshop series, then perform the longer icebreaker as part of the morning introductions in the day-long agenda.

WHO DOES THE WORK IN YOUR UNION? (Short)

Summary

This is the recommended opening exercise for Beating Apathy, the first workshop in the series. This exercise can be performed in two ways: short, as a 10-minute opener or long, as a 20-minute opener, depending on how much time is available. Both should lead directly into Aim for the Bullseye in Beating Apathy.

Total activity time: 10 minutes

Ask everyone in the room to pair up with someone they don't know yet and share their name, where they work, and one key issue or problem that they hear their co-workers complain about at their school site and in their district. They have three minutes apiece to talk.

Ask participants to come back together as a group.

By a show of hands, how many people here are relatively new to the labor movement? Under five years?

How many have been involved between six and 10 years?

Between 11 and 15?

More than 15? More than 20?

How many building reps or delegates in the room?

How many officers?

Now, raise your hand if you feel like you are part of a union in which the vast majority of your members share equal responsibility for doing the work of the union, and only a few are relatively unsupportive or disengaged.

[Expected result of last question: few to no people raise their hands.]

Raise your hand if you feel like you're part of a small number of people who do the majority of the work of the union, while everyone else is doing far less.

[Expected result: just about everyone raises their hands.]

At Labor Notes, we think of our union in the shape of a target, with a bullseye in the center. We think that moving people closer to the bullseye is at the heart of what an organizer does, and that's why it's the cover of our book.

Go right from here into Aim for the Bullseye.

WHO DOES THE WORK IN YOUR UNION? (Long)

Summary

This is the recommended opening exercise for Beating Apathy, the first workshop in the series. This exercise can be performed in two ways: short, as a 10-minute opener or long, as a 20-minute opener, depending on how much time is available. Both should lead directly into Aim for the Bullseye in Beating Apathy.

Total activity time: 20 minutes

We are going to see who is in the room with us today. Please sort yourselves into a line, from the person with the longest experience in the labor movement at one end to the person with the shortest experience at the other.

Line Introductions: 10 minutes

After people have lined up, ask participants to introduce themselves one by one, starting at the end of the line with the least-experienced person:

Very briefly, in five seconds or less, tell us your name, what union or organization you are with, and how long you have been involved in the labor movement.

Paired Conversation: 7 minutes

After everyone has introduced themselves, explain that they will be pairing off with the person on the opposite side of the line from them. So the newest member of the labor movement will be pairing off with the person who has the most experience, the second-newest with the second-most experienced, and so on down the line until the two folks in the middle with similar amounts of experience are together. (If there is an odd number of participants, the facilitator should pair up with the person in the middle.)

In pairs, each person should share their name again, where they work, and one key issue or problem that they hear co-workers complain about in their workplace. Tell them that they have 2 minutes apiece to talk.

Division of Labor: 3 minutes

Ask participants to come back together as a group.

We are going to be lining up again. This time I want you to line up by how engaged your members are in the union.

Point to one end of the room.

If you feel like the vast majority of your members share equal responsibility for doing the work of the union, and only a few are relatively unsupportive or disengaged, then you should be closer to that end of the room.

Point to the other end of the room.

If you feel like a small number of people at the top do the majority of the work of the union with everyone else doing far less, then you will be closer to that end of the room.

After people have lined up, pick out a few folks from different spots and ask them why they chose to stand where they are and what the situation is like in their union/organization.

[Expected result: the majority of the room will be clumped together at the end of the room symbolizing a union with only a small number of people on top doing the work.]

[Feel free to probe this further by randomly asking a few individuals to share why they choose that side of the room. Ask others to raise their hands if the description/experience sounds familiar to them.]

Go right from here into Aim for the Bullseye.

TRACK YOUR VICTORIES

Summary

This is an introduction you use if you are going to use the Exercise: Track Your Victories handout in your workshops.

This handout is optional and can be used to highlight victories that are shared over the course of the day. If you are performing the AHUY Closing Activity, then you must use this handout and introduce it at the beginning of the day.

Total activity time: 10 minutes

Point to Exercise: Track Your Victories in the handout packet.

Please feel free to fill out this worksheet throughout the course of the day, as we discuss examples of collective action to solve problems at your school site.

We are going to be using them in an activity at the end of the day.

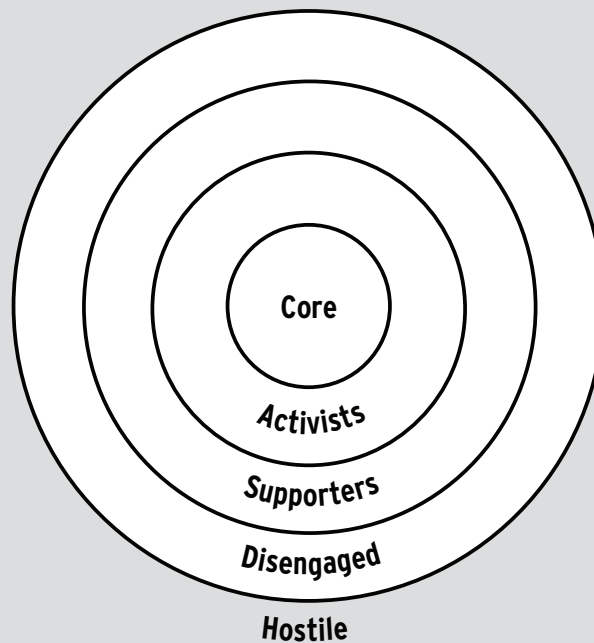
[As people tell good stories throughout the day, make sure to remind them to write these stories down on the handout.]

AIM FOR THE BULLSEYE (5 MINUTES)



Direct participants to the handout Aim for the Bullseye and unveil the poster-sized Bullseye on the wall. Explain the rings (Secret #3):

AIM FOR THE BULLSEYE



- At the center is the **CORE**. These are the people who are always thinking about organizing and how to get others involved. This might be elected leaders, delegates, or building representatives, but it might not.
- In the first ring are **ACTIVISTS**. These are the folks who can be counted on to help when an issue heats up. They will take responsibility for getting the word out and will recruit others to take action and get involved.
- In the second ring are **SUPPORTERS**. These are the people who will come to meetings, wear buttons, and/or sign a petition, but don't take responsibility for getting others involved.
- In the third ring are the people who appear most **DISENGAGED**. They don't see the union as relevant to their lives, so they don't participate.
- There are some people who aren't just uninvolved, but are **HOSTILE**. They are outside the circle.

Discussion (5 minutes)

For those of you who felt like you are part of a small number of people who are doing all the work of the union, you would probably identify with being in the core. Most of the rest of your union falls somewhere else—maybe in the supportive or disengaged rings?

Is that how most of you see the union?

Where do your fellow union members fall in the rings? Which rings are the biggest?

What about your principal or superintendent? Do they see a small core group of people doing most of the work? Do they see many activists?

What do you think the relationship is between how your union's members are distributed among the rings and the power that your union has?



Key Point

Our task as organizers is to move people toward the center of the bullseye by helping them take one step at a time.

HOW DO WE CURRENTLY SOLVE PROBLEMS? (15 MINUTES)

Questions and Discussion (15 minutes)

How do we move our co-workers to get more involved? Let's start by taking a look at how we currently solve problems in our union.

Let's have a show of hands: At the beginning of the workshop when you paired up, did anyone have a hard time thinking of any issues or problems at your school site? **[Expected result: no hands go up.]** What were some of the issues?

Ask participants to "popcorn"—shout out their answers. Write the responses on the flipchart. Keep writing until you have a large list.

How do we currently solve these problems in our union?

You are looking for: "grievances," "bargaining," or "call the union and ask for help from the building rep / president / union staff." Setting up a meeting with the principal is also a common response. If someone gives an example of collective or group action, tell them that's great and we will be returning to that.

In districts and states with limited collective or no bargaining, you might focus instead on attending school board meetings, or meeting with the principals or superintendent to enforce a policy manual or handbook.

What are some of the pros and cons of settling our problems through a representative meeting with the principal, filing grievances, and/or bargaining with the school district?

Ask probing questions:

- Are individual meetings and grievances getting at the issues that members care most about?
- Do grievances or meetings with the principal typically involve a majority of members?
- Are these meetings or grievances typically visible to a majority of members?
- What happens when members don't see the union fighting for issues they care about?
- How do grievances and bargaining relate to the current spread of members among the rings?

Some participants might feel like it would be a miracle to get their union just to file a grievance. Don't be dismissive of the grievance process or the internal struggle at some unions to protect contract standards.

Meeting with the principal and filing grievances are necessary steps, but alone they are not enough to really shift the balance of power at the school site. We need to “supercharge” our grievances and meetings through organizing.



Key Point

If your co-workers are feeling lots of issues and problems at work, but they don't think the union has the power to solve those issues or they think the union isn't even interested in solving them, that may be a reason why they're not getting involved.

Of course we need to file grievances, bargain, and set up meetings with principals or superintendents but what are other ways we can solve problems on the job?

Return to anyone who offered an example of an action at a school site previously.



[Ideally you have prepared one or more participants to share strong examples of how they used collective action to solve problems. Invite them to tell their stories now.]

If no one is prepared to speak, ask:

Is there anyone who can share a story of how you used collective action to solve a problem at work?



Key Point

Taking action and winning on issues that people care about changes the balance of power at work. It pushes the principal or district to do something they don't want to do. It builds people's confidence to get involved, and it brings more people closer to the bullseye.

HOW THE BOSS KEEPS US DISORGANIZED (20 MINUTES)

Introduction (1 minute)

Next let's talk about some of the obstacles that keep people from stepping up and taking on the boss.

When we say boss, depending on the issues we are facing, we can mean the principal, superintendent, school board, all the way to the governor and state legislature.

Everyone cares about something. (*Point to issues previously listed.*) But there are very real reasons why our co-workers are reluctant to take action. In fact, while we are trying to organize our co-workers, the boss is trying to keep us disorganized.

In the four corners of the room you will see four of the tactics that bosses use to keep us disorganized: **fear, hopelessness, confusion, and division.**

Which of these four is the most effective at keeping people from taking action in your workplace? Let's vote with our feet. Everyone please get up and go stand in the one of the four corners. Pick the one that has the biggest impact where you work.

Breakouts and Discussion (19 minutes)

Direct everyone to spend a minute talking to someone else about why they picked their corner, then have the other person tell them the same.

Ask a few people in each corner to explain to the whole group why they chose that corner. (2 minutes per corner for 8 minutes). For variety, you could ask two corners to share how the boss keeps them from taking action, and the other two corners for examples of how they overcame their obstacles.

HOW THE BOSS KEEPS US DISORGANIZED

Ways the boss keeps us disorganized	Ways that organizers overcome
Fear	Tap into righteous anger
Hopelessness	Develop a plan to win
Division	Identify common ground
Confusion	Interpret and share information



*After having individuals speak from each corner of the room, ask everyone to return to their seats. Direct participants to the handout **How the Boss Keeps Us Disorganized** and unveil the poster-sized **How the Boss Keeps Us Disorganized**. Review how organizers can combat each of the four obstacles (**Secret #2**):*



[Ideally you have prepared one or more participants to share strong examples of how they overcame fear, hopelessness, division, or confusion. Invite them to tell their stories now.]

Ask the group:

How have you overcome some of these obstacles yourself? How have you seen others help one another overcome these obstacles?

Do our union's current strategies for solving problems address these obstacles? For example, do grievances and bargaining fundamentally challenge the fear that workers feel on the job?

This workshop is called Beating Apathy. We've identified all these issues that we face in the workplace and all these ways that the boss keeps us disorganized. So what do you think, is apathy really the problem? Is it the case that our co-workers really don't care?



Key Point

The punchline is this: apathy isn't real. We've seen from the beginning that there are lots of issues that you and your co-workers care about. But there are legitimate reasons why your co-workers might not be ready to take action.

They might not see the union taking on the issues they care about. They might not see the union as powerful enough to win. And the boss is actively using fear, hopelessness, division, and confusion to keep us disorganized.

It's our job as organizers to identify the obstacles that are keeping our co-workers from taking action, so we can help them to move beyond them and take action together.

HOW TO IDENTIFY AN ORGANIZING ISSUE (5 MINUTES)

Ask everyone to return to their seats.

Questions and Discussion (5 minutes)

If we're going to develop a union culture where people are expected to help defend the contract and have each other's backs, then we will need to identify and tackle the issues that enough people care enough about to take action.

An issue is a workplace problem.

We've already identified a lot of issues, but we can't take them all on at once. Which of these are potential organizing issues? Why?

[If necessary, draw a distinction between an obstacle, such as fear, and an issue such as arbitrary discipline.]



Direct participants to the handout A Good Organizing Issue and read it aloud (Secret #22-25):

A good organizing issue is one that matches most of these criteria.

- It is widely felt.
- It is deeply felt.
- It is winnable.
- It builds the union & builds rank and file leaders.
- It has a connection to students and the public.



Key Point

If you're just getting started and your union doesn't have a history of taking action, try to remember this: we want to pick issues that are **small enough to win, big enough to matter**.

HOW TO HAVE AN ORGANIZING CONVERSATION (65 MINUTES)

How do we identify what issues people care about and what obstacles are holding them back?

We have to talk to them!

How to Be a Good Listener (5 minutes)

Has anyone heard of the 80/20 rule for conversations? Anyone know what that is?

We should be listening 80 percent of the time and talking 20 percent of the time. One of the most important parts of an organizing conversation is active listening.

So what are some good rules for active listening?



Direct participants to the handout How to Be a Good Listener (Secret #9):

[Rather than walking through the entire handout, feel free to use the following points]

Points to hit—don'ts:

- Don't assume you know the answers to questions. Let people tell you what they think is important. It might not be what you think.
- Don't ask questions that are really statements: "Don't you think what we need to do is go on strike?"
- Don't go fishing—running through a laundry list of questions or issues: "So do you want higher wages, better health insurance, smaller class sizes?"
- Don't talk like a salesperson: Selling union benefits that only a small number of teachers and school employees think they will need or use (example, liability insurance) might convince them they *don't* need to be involved. Example: "All you need is one student making a complaint..."

Points to hit—do's:

- Do listen more than you talk (80/20)
- Do slow down. Don't rush through the conversation to get to the "ask."

- Do show you are listening by acknowledging what the other person says. Ask follow-up questions.
- Do practice empathy. When people tell you what they're upset about, acknowledge their experience. Don't judge or dismiss it.

AHUY (5 minutes)

Nobody should follow a script mechanically. We need to talk to people like human beings. However, organizing conversations are not gripe sessions.

An organizing conversation has specific goals: to identify the issues this person cares about, connect them to a plan of action, and get this person to commit to participating. The organizer follows a structure we call a "rap."

We want our co-workers to realize:

- They care about a problem.
- There is 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 to be fixed, they have to join you and other co-workers in taking action.



Direct participants to the **AHUY** worksheet and review it (**Secret #12**):

AHUY is an acronym we use to remember the steps in the organizing conversation.

Ask/Agitate/Anger: Ask questions, identify issues, and tap into righteous anger.

Hope: Share your plan to win or examples of success.

Urgency: Now is the time to act.

You: Can we count on you?

Having an organizing conversation is a skill. It gets easier the more we practice it!

Remember the 80/20 rule?—we should spend the majority of our time listening. So where in this rap are we going to spend the majority of our time?

In the “A” part—Ask/Agitate/Anger—this is where you uncover what really gets under your co-worker’s skin while identifying what might be holding them back from getting involved. Try to tap into the anger they feel at injustice and to get them to say what it’s going to take to make a change.

To do that, good listeners ask good questions.



Practicing Asking Questions (10 minutes)

Let’s practice our listening skills.

Have participants break into pairs.

You’re going to start a conversation and get to know this person. Try to identify their number-one workplace issue and find out as much as you can... by only asking questions.

It’s important that we use open-ended questions. Does anyone know the difference between open and closed questions?

Closed questions are yes/no questions. Open questions require fuller responses.

Examples:

- Closed question: “Do you like where you work?”
- Open question: “What do you like about your job?”

So for this exercise we want to use open questions.

Give them 3 minutes apiece, then tell them to switch and the other person will ask questions.

Bring the whole group back together. Discuss:

How did that go? What did we learn?

Types of Questions (5 minutes)

Nobody likes to be talked at or told what to think, but you can go really far in a conversation just by asking the right questions.

Let's review and brainstorm types of questions that are useful for having organizing conversations.

Intro questions: What are some good questions to start a conversation?
(*Brainstorm.*)

Examples:

- How is your day going?
- How long have you worked here?
- How have things changed since you started?

Agitating questions: Once the other person has mentioned some issues, what are some agitating questions you could use to get this person fired up and figure out how strongly they care about an issue? (*Brainstorm.*)

Examples:

- Is that okay with you?
- How long has that been going on?
- Is that how you would do things, if you were in charge?
- What would need to change to make your job more fulfilling?
- What would need to change for you to feel respected at work?
- Why do you think we're having this problem?
- What does this mean for students?

Polarizing questions: What are good polarizing questions you could use to get your co-worker to lay the blame for the problem, and move towards getting a commitment to action? (*Brainstorm.*)

Examples:

- Who is in the position to fix this? What would they have to do?

- How much longer are you willing to put up with this?
- Is that ever going to get better if we do nothing?

Inspiring Hope, Creating Urgency, and Calling the Question (5 minutes)

What examples can we share to inspire hope? (*Brainstorm.*)



Key Point

A great way to inspire hope is to have a plan. It's the difference between praying it doesn't rain and having ponchos and umbrellas ready to go. Having a plan inspires confidence.

The next step is the U in AHUY (urgency), connecting the plan to win to the need for immediate action:

- We can't sit on problems.
- We have a timeline and we have to show the boss we are serious.

Getting a commitment is the "You" in AHUY.

What kinds of questions can we use to ask for a commitment? (*Brainstorm.*)

- Can we count on you?
- Are you on board?
- Are you coming to the meeting?

Don't shy away from being direct. Don't move on until you get an answer.

Example Roleplay (5 min)

You will have a chance to practice an organizing conversation in pairs, but first let's do a test run of what we've brainstormed.

[Ideally you have prepared an experienced rank and filer to play the role of the organizer. They should be prepared to get to an "Ask." If not, then the facilitator should play the organizer. Either way, recruit a volunteer on the spot to play the role of the other worker.]

Role-play the organizing conversation to model for participants what we are asking them to do in the next exercise.

Then debrief:

- What did you see? (Walk through how the organizer applied each step of A.H.U.Y.)
- What kinds of questions did you hear?
- What might you have done differently?



Key Point

What makes an organizing conversation different from a gripe session is that we plan a solution and end with an ask.

If we want to have quality conversations, we need to think about when we can reach people, when they will have time to talk. What are good times to catch teachers and school employees? (*brainstorm*)

Examples: Before school, during lunch, during prep time.

Sometimes if the conversation is critical, you need to set up a meeting after school, at a coffee shop, or at someone's house.

Roleplay (20 minutes)

Ask everyone to pair up to practice the organizing conversation. Explain that one person will play the organizer, and the other will be the worker. After 10 minutes you will let them know it's time to switch roles and repeat the exercise.

Give the organizers a prompt, such as that they are trying to get this worker to sign a petition, come to a meeting, or wear a button about a certain issue. If possible, draw your prompt from a story already shared or discussed in the workshop.

After 10 minutes remind the pairs to switch.

Debrief the Roleplay (10 minutes)

Bring everyone back together as a large group.

- What was most challenging about the conversation?
- Do you think you got a sense of what the member's issues and concerns were? How did you do this?
- What were some of the things you said that were effective in educating and agitating around the issue? What else could you have said?
- How did you specifically ask for the person's commitment to participate? Did you get a firm commitment?



Answering Tough Questions and Inoculating (10 minutes)

[*BONUS ROUND* If time allows, use this exercise. If not, move ahead to review.]

We know that our conversations won't always be easy. We are likely to get some pushback from our co-workers when talking to them. What are some examples of tough questions we might get? (*Brainstorm.*)

- I don't want to risk my job/get in trouble.
- It's pointless. Things will never change.
- I'm too busy. I don't have time.



Direct participants the handout Answering Tough Questions. Introduce the idea of "Affirm, Answer, Redirect." (Secret #34)

This is one method for putting the focus back on the issue and our plan to fix it while also responding to the concerns we are hearing.

Choose one of the tough questions participants brought up. Brainstorm as a group how you could answer that question using "Affirm, Answer, Redirect."



Direct participants to the handout on Inoculation.

It's also important that we solicit tough questions so we can collectively work through what we expect the boss will do. We don't want our co-workers to be caught off guard when management pushes back. One method for preparing our co-workers for whatever the boss throws at us is inoculation:

1. Ask questions about how the principal or superintendent will react to your organizing.
2. Discuss how and why they will fight.
3. After discussing, recommit to the action.

Inoculation is not about scaring our co-workers. It's about deepening their commitment to action.

Direct participants to the handout Organizing is an Attitude / Apathy Isn't Real.

Review

Apathy isn't real.

Organizers have conversations with co-workers to identify the issues they care about and tap into their anger at injustice, to overcome the obstacles that the boss relies on to disorganize us.

We identify the issues that enough people care enough about that they're willing to take the risk of collective action.

By taking action, our co-workers move closer to the bullseye.

SECRETS OF A SUCCESSFUL ORGANIZER

PART 2: ASSEMBLING YOUR DREAM TEAM



Dan Lutz

PART 2: ASSEMBLING YOUR DREAM TEAM

Total active workshop time: 2 hours

- Introduction/Icebreaker: 10 minutes
- Why We Need Leaders to Organize: 15 minutes
- Qualities of a Leader: 5 minutes
- Leader Scenario: 30 minutes
 - Small Group Activity: 15 minutes
 - Large Group Discussion: 15 minutes
- How Our Workplace Is Organized: 5 minutes
- Identifying Leaders: 5 minutes
- Mapping the Workplace: 40 minutes
 - Introduction: 5 minutes
 - An Example Map: 5 minutes
 - Draw Your Own Workplace Map: 10 minutes
 - Volunteer Shares a Map: 10 minutes
 - Discussion: 10 minutes
- Big Picture/Sum Up: 10 minutes

Setup (before the workshop starts)



- ☐ Have packets prepared for participants with all the handouts:
 - Exercise: Why We Need Leaders to Organize
 - Exercise: Identifying Leaders (six pages)
 - Exercise: Map Your Workplace
 - Exercise: Draw Your Own Map
 - Ten Questions to Ask When Mapping Your Workplace
 - Exercise: Make a Chart, Too
 - Chart Template

- ☐ If performing as a stand-alone workshop, be prepared with the following handouts:
 - Aim for the Bullseye
 - How The Boss Keeps Us Disorganized

- ☐ Have copies of Organized People Have Power ready to hand out separately (not in the packet) since participants will need to fold it.

- ☐ Have poster-sized copies on the wall of:
 - Bullseye Diagram
 - Workplace Map, covered (example provided on page 50)
 - Sample Organizing Wallchart, covered (example provided on page 51)

- ☐ Supplies:
 - Pens/pencils
 - Flipchart
 - Markers
 - Tape

EPIC ROCK, PAPER, SCISSORS

Summary

This is a great energizer or introductory exercise to do as a lead-in to the workshop *Assembling Your Dream Team*. This exercise helps to reinforce the point that we can recognize leaders by whether or not they have followers.

Total activity time: 10 minutes

INTRODUCTION

We are going to play a quick game called “Epic Rock, Paper, Scissors.”

Real quick, let's review how to play the game.

Walk through what beats each type: rock beats scissors, scissors beats paper, paper beats rock.

Epic Rock, Paper, Scissors is an elimination competition. Everyone in the room will need to find a partner to play rock, paper, scissors with.

Demonstrate finding a partner and playing the game.

Whoever loses the first game, you now become the world's biggest fan of the person you lost to.

You follow them around cheering their name wildly and clapping and dancing for them to win. The winner goes on to find someone else in the room who has won.

Whoever wins the next round, the person who lost and all their fans now become the world's biggest fans of the new winner.

This continues until we have a final epic match-up pitting two great rock, paper, scissors champions against one another—and at last we have a winner that we are all the world's biggest fan of.

LATER DISCUSSION

*This exercise can be brought up in the “Qualities of a Leader” exercise in *Assembling Your Dream Team*.*

GET ON THE BUS!

Summary

This is a great energizer or introductory exercise that can be used as a lead-in to the workshop series on Assembling Your Dream Team or Turning an Issue into a Campaign. This exercise can be used to reinforce the point that we need to actively recruit more people to be in our core group, or that there are many overlapping issues that workers share in common.

Total activity time: 10 minutes

INTRODUCTION

We're going to play a quick game called "Get on the Bus!"

I will ask a question, and you have to form a "bus" with everyone who shares the same answer as you.

For example, if I say, "Form a bus with people who speak the same number of languages as you," then you walk around and find those people who all speak the same number of languages and group together as a "bus."

EXERCISE

Form a bus with people who...

- Were born in the same decade
- Have been a union building rep before
- Have the same favorite ice cream flavor

... believe you need more people on your organizing team!

Or

... believe we need a strong labor movement that can take on the boss and win!

INTRODUCTION/ICEBREAKER (10 MIN)

[If performing as a stand-alone workshop, facilitators introduce themselves and the agenda.]

[To have people introduce themselves, consider doing the first half of the short version of *Who Does the Work in the Union?* (see page 15), ending with the question “How Many Officers?”]

[If performing as part of a workshop series, review lessons from *Beating Apathy* (organizing means finding out what our co-workers care about and inspiring them to action).]

To organize and win, we need more people on our team—leaders who can bring others along. The good news is we’re not starting from scratch. In this workshop we’re going to talk about how to uncover the hidden networks that are already there in any workplace and recognize the people who can move their co-workers into action.

Icebreaker: Get on the Bus! or Epic Rock, Paper, Scissors

Choose either of the two icebreakers:

- Get on the Bus!
- Epic Rock, Paper, Scissors

WHY WE NEED LEADERS TO ORGANIZE (15 MIN)

Sometimes we get to choose the issues to organize around and sometimes the issues choose us. Let's start out by imagining that you showed up to work and learned that the district announced it has eliminated the school librarian position, and laid off the librarian, a 20-year educator. You have until the end of the day to get the word out about a sticker day beginning tomorrow morning.

Think of your school. You want every member to be wearing a sticker at the start of and throughout the day of action. Because people can feel intimidated about taking action or confused about the issue, it's best to hand out the stickers in person, not just leave them in a mailbox or lounge. It's important for the union to explain the issue and answer questions before the principal or administration has a chance to get out their side of the story.

Think about how you would plan and execute the day of action.

- Who would you talk to and give stickers to?
- Who would you have a hard time reaching?

Small Group Discussion (10 min)

Think about a plan for your school site, or if a group of you are from the same school, work together. Then discuss your plan with the others at your table. If you get ideas from other participants, update your plan. **[Depending on size of groups, it might make more sense to have participants share in pairs, so everyone has an opportunity to participate.]**

Large Group Discussion (5 min)

Let's hear a few examples. How would you reach as many people as possible, as quickly as possible?

If people offer a solution other than using a network of co-workers (such as all on their own talking to every co-worker, or sending out a mass email), probe for limitations of their approach:

- Who wouldn't you be able to reach?
- What are the limitations of an email compared to a personal conversation?

Make sure you are touching on how to overcome obstacles such as fear, hopelessness, and confusion.

The rest of this workshop will focus on how we can map and chart our workplace and recruit more people so we can grow the work of the union.

QUALITIES OF A LEADER (5 MIN)

So we need to find the right people to join our team and help build the union.
The goal is to identify leaders at work.

What is a leader? (*Brainstorm.*)



Key Point

A leader is someone who has followers. Leaders move others to action.

LEADER SCENARIO (30 MIN)



Direct participants to Exercise: Identifying Leaders in the handout packet.

Small Group Activity (15 min):

Have participants break into small groups of four to six. Ask them to read the scenarios and discuss which characters they think are the leader. Ask each small group to report back.

Who would you recruit to your school committee?

Who would you NOT want on your school committee?

Large Group Discussion (15 min):

Who did you think was the best leader and why? The worst and why?

[Refer to trainer's key. Make sure participants understand why Brenda is the first choice and Cindy is last choice. Flipchart responses and encourage discussion and debate.]



Key Point

- Leaders have followers. (Secret #16)
- There are probably multiple leaders, with different followers.
- You have to talk to a lot of people to find out who the leaders are, and to learn about how the workplace is organized.
- This isn't to say that people cannot become leaders, but we are starting from the assumption that there are already leaders in the workplace and we have to find out who they are.
- The leader of one group might not be respected by another group, and might even be alienating to some.
- Just because someone is already in favor of the campaign doesn't make them any more of a leader than someone who is unsure or even hostile to the union. Our job as organizers is to identify people's issues and move them with hope and a plan to win!

IDENTIFYING LEADERS EXERCISE: TRAINER'S KEY

In this exercise, participants will read the profiles and pick their first, second, and third choices for the committee. **Brenda Hammond** is the best choice; **Sally Rivera** and **Paula Harris** are other top contenders. Participants should also select the person they do NOT think should be on the workplace committee; this is **Cindy Thomas**.

Worker	Signs of leadership	Warning signs	Additional info
Brenda Hammond	<ul style="list-style-type: none"> She's a longtime employee and others identify her as a good teacher. She organizes birthday parties and showers, and has a list of her co-workers' numbers. She mentors new teachers. Her name came up in all four organizing conversations, mostly in a positive light. 	<ul style="list-style-type: none"> Participants may identify the fact that Brenda wants to find a better job as a negative sign. You can ask the group, "How many of you have talked about leaving your job when things were tough?" Participants may also flag that Sally says management has plans for Brenda. That's often a sign that someone is a good worker, not that they won't be a good leader. 	<ul style="list-style-type: none"> She has an issue: after 14 years teaching 5th grade at her school, her principal switched her to 1st grade. Just because someone doesn't see themselves as a leader doesn't mean they don't have followers.
Sally Rivera	<ul style="list-style-type: none"> She spoke up to the principal. She's been talking to her co-workers about getting organized. Eve identifies her as the leader of the younger teachers. She brings a co-worker to meet you. 	<ul style="list-style-type: none"> Brenda says that sometimes Sally only fights for herself. 	
Paula Harris	<ul style="list-style-type: none"> Brenda, Eve, and Francis respect her. 		Even though there's no profile for Paula, the fact that three people mention her makes her a potential leader, and definitely someone we want to talk to.
Cindy Thomas	<ul style="list-style-type: none"> Francis described her as a "firecracker." 	<ul style="list-style-type: none"> She's only had the job for three months. She says she doesn't talk to her co-workers, doesn't know their names, and calls them "robots." 	Just because she's not a leader doesn't mean she can't be an activist.
Francis Powers	<ul style="list-style-type: none"> She has worked at the school for eight years. She's identified by Brenda and Eve, with a mixed endorsement (leader, but has screwy ideas). 	<ul style="list-style-type: none"> She doesn't have much respect for an obvious group in the workplace, the younger teachers. She says the younger workers don't take anything seriously. 	
Eve Winters	<ul style="list-style-type: none"> Sally recommends talking to Eve because "she has been around for a long time." Francis suggests she would be a good leader. 	<ul style="list-style-type: none"> She doesn't want to get involved because she's waiting for a promotion, and will be mad if it goes to one of the principal's "pets." 	
Helen Rockwell, Mary Smith			We don't know enough; need to do a one-on-one conversation with each of them.

How Our Workplace Is Organized (5 min)

Let's talk briefly about the two ways our school sites and districts are organized.

The workplace is organized by the boss, and also organized more informally or socially.

What does it mean when we say the workplace is organized by the boss? For instance, we are grouped by job title, campus, floor, department... What are some others?

Flipchart responses.

Our workplaces also have a more informal social organization. Anyone have ideas about what we mean by "social organization"?

Flipchart responses.

Examples:

- Who eats lunch or takes breaks together?
- Who carpools?
- Who socializes outside of work?
- Who are relatives?
- Who goes to the same church, temple, or mosque?



Key Point

Our workplaces have work networks and social networks. We have to uncover both kinds of networks and then figure out who are the leaders in each.

Identifying Leaders (5 min):

What questions can we ask to find out who are the leaders in a workplace or department? (*Brainstorm and flipchart.*)

Examples:

- Who trains new teachers and/or school employees?
- Who speaks up for their co-workers in meetings?
- Who do people go to with problems, or when the principal or the district does something unfair?
- Who has been working here a long time?
- Who organizes parties?
- Who is known as especially good at or dedicated to their job?

**Key Point**

A leader doesn't necessarily fit all these categories, but if someone's name keeps coming up, there's a good chance that person is a leader.

MAPPING THE WORKPLACE (40 MIN)

Intro (5 min)

Has anyone here ever mapped your school site?

If Yes:

- When? In what campaign?
- Why did you map the school?
- Was it helpful?

If No:

Many union activists have found this activity useful. We are talking about making an actual, physical representation of the workplace and then filling it in with information about who works in which areas and how people move around.

What are some reasons that this information might be useful?

Write “Why We Map” on flipchart paper and start writing down people’s responses (Secret #21):

Exercise: An Example Map (5 min)

Let’s look at an example.

*Unveil your **Example of a School Map** (see page 52 for an example). Talk about the different features of the map. Answer any questions.*

Exercise: Draw Your Own Workplace Map (5 min)

Divide the room into small groups. Give a piece of flipchart paper and markers to each group.

We’re going to ask each group to draw a map of one school site. You have 60 seconds to decide whose workplace will be drawn. Go!

Wait 60 seconds.



*Direct them to the handout **Ten Questions to Ask When Mapping Your School** and ask them to see if they can answer these questions for their map.*

Try to be as quick as you can. You don't have to answer all the questions, just see how many you can work through in a short period of time.

[Facilitator should be circling the room making sure groups are working together and determining which map to share in next activity.]

Exercise: Volunteer Team Shares a Map (10 min)

Ask the group with the best map to come up to the front and share it. Walk through as many of these questions as you can:

- Who can walk freely through the whole building or campus?
- Where do people congregate?
- Where can you talk out of sight of the principal?
- Where do people go after school?
- Which groups have contact with each other through their jobs?
- Which groups are hard to reach?
- What on this map changes throughout the day and week?

Discussion (10 min)

A map can help you recognize where the different groups are, and develop strategies to reach them.

Once you know you need to connect with a certain group, focus on identifying the leaders in that group—those are the people you want to recruit to your team.

How can we keep track of the information we're gathering and stay up to date? For that we use another tool: a chart.

*Unveil your **Example of an Organizing Chart**.*

A chart is a well-organized list of information about your co-workers. You could write it on paper or type it up in an Excel spreadsheet.

Make one row for each person, and one column for each piece of information you're keeping track of. For example:

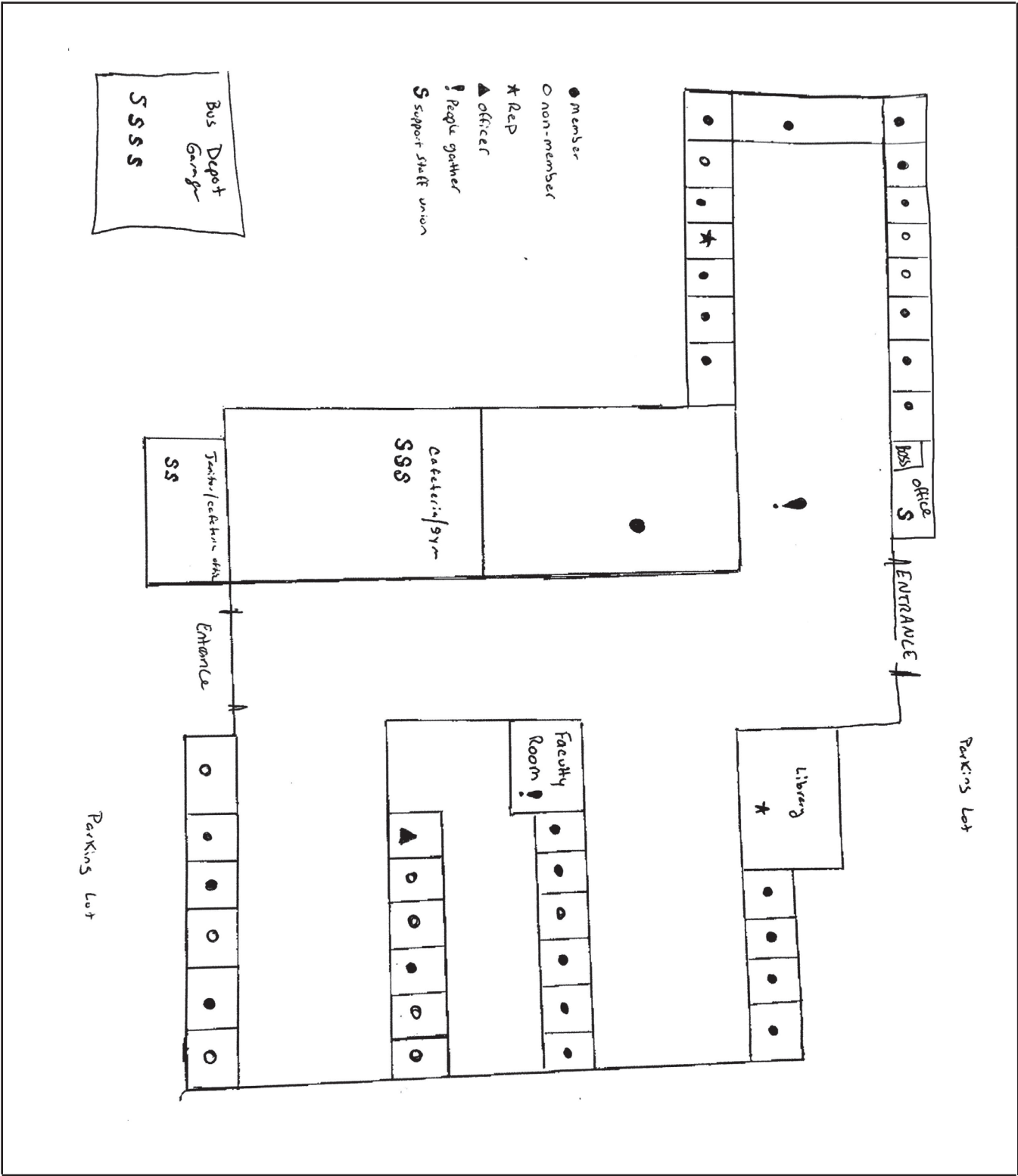
- Name
- Job Title
- Grade
- Floor/ Area
- Phone number
- Email
- Did they fill out a bargaining survey?

What are some other pieces of information you might want to keep track of for each person? (*Brainstorm and flipchart.*)



*Direct participants to the handout **Make a Chart Too (Secret #21)***

EXAMPLE OF A SCHOOL/CAMPUS MAP



EXAMPLE OF AN ORGANIZING CHART

CHART TEMPLATE

Twin Pines Elementary

Label these columns yourself with actions or other info you want to track.

[illegible]

BIG PICTURE/SUM UP (10 MIN)



Thinking back on everything we've covered:

We can't talk to everyone ourselves. We have to find influential and respected co-workers who can help carry the load. These are our leaders and they have followers. We have to know where they are. We need to know how to get in touch with people, and which parts of our workplace have leaders that are active in the union and which do not.

Let's go back to the sticker day exercise we did at the beginning of the workshop.

Thinking about the plan you made, what would you do differently?

What if you call the action and no one shows up from _____? (Pick a work group or social group that has been mentioned, such as the English Department, the secretaries, the younger teachers, the east side carpool, or the paraprofessionals.)

Maybe we made the wrong assessments of who are the leaders in that group or don't have a leader from that group.

Additional points you could make: It might be that the leader is correct, but the issue was not widely or deeply felt, or the tactic was too big a leap and workers were not inoculated against their fear. Actions are tests, but what we learn from the test depends on the results.



Key Point

We test potential leaders by giving them tasks. Can they get their co-workers to do something, like come to a meeting, fill out a survey, sign a petition, or wear a button? The people who succeed at inspiring other people to take action are real leaders.



Hand out Organized People Have Power

We talked earlier about how the boss structures our school site. Look at the diagram on the front of this page. As you can see, the bosses have set up a structure that they hope will keep us isolated and divided.

Today we've been talking about how we can organize ourselves to build a power that can rival the principal and school district's power. We can't do that with just a few people. Our power is in our numbers, and we're strongest when our whole school site can act in unison.

So how do we build the power to act in unison? By organizing a network that includes every group and that has leaders at the center.

Walk through the role of an organizer, following the steps shown on the handout:

The organizer has one-on-one conversations to identify the existing groups (work and social) and who their informal leaders are.

The organizer recruits those leaders to join our organizing committee.

Invite participants to fold the handout along the dotted line, so they can see the diagram of an organized workplace.

Our committee connects workers together in an organized structure that can challenge the boss.



Key Point

A strong organizing team should include leaders from every department, job classification, and social group. Aim for one leader for every 10 workers. This means that we aim for having 10 percent of the union in our core, if they are leaders. At a small school, the ratio may be smaller to ensure all groups are represented.

Return to the Bullseye Diagram.

[If performing as part of a workshop series: Review Aim for the Bullseye on Organized People Have Power]

[If performing as stand-alone, walk through Aim for the Bullseye]

From an organizer's point of view, you can think of your union like a target with a bullseye.

At the center is the **CORE**. These are the people who are always thinking about organizing and how to get others involved. This might be elected leaders, building representatives or delegates, but it might not.

In the first ring are **ACTIVISTS**. These are the folks who can be counted on to help when an issue heats up. They will take responsibility for getting the word out and will recruit others to take action and get involved.

In the second ring are **SUPPORTERS**. These are the people who will come to meetings, wear buttons, sign a petition, but don't take responsibility for getting others involved.

In the third ring are the people who appear most **DISENGAGED**. They don't see the union as relevant to their lives, so they don't participate.

There are some people who aren't just uninvolved, but are **HOSTILE**. They are outside the circle.

We want to draw people toward the bullseye, step by step. Bring more people into the inner circle and they can bring more people into the second and third circles of the target.



Key Point

Who do we want to bring closer to the bullseye? The leaders, because they will be able to bring others along.

SECRETS OF A SUCCESSFUL ORGANIZER

PART 3: TURNING AN ISSUE INTO A CAMPAIGN



James Leder

PART 3: TURNING AN ISSUE INTO A CAMPAIGN

Total active workshop time: 2 hours

- Introduction/Icebreaker: 10 minutes
- *BONUS ROUND* Education Through The Decades: Extra 30 minutes
- Why We Need Campaigns: 10 minutes
- Review: Identifying the Issue: 5 minutes
- Making a Game Plan: 10 minutes
- Turn Up the Heat: 20 minutes
- Campaign Mountain: 10 minutes
- Plan Your Campaign: 25 minutes
- *BONUS ROUND* Community Mapping: 25 minutes
- Wrap Up: 5 minutes

Setup (before the workshop starts)



- ☐ Have packets prepared for participants with all the handouts:
 - Case Study: How Teachers Broke The Mold
 - A Good Organizing Issue
 - Make a Game Plan
 - Checklist: Choose Tactics That Fit
 - Turn Up the Heat: Action Thermometer
 - Campaign Mountain
 - Campaign Planning Template
 - Community Mapping Survey
- ☐ If performing as a stand-alone workshop, Organized People Have Power.
- ☐ Draw or print a poster-sized copy of:
 - Campaign Mountain on the wall, covered.
 - Thermometer on the wall, covered.



- ☐ Prepare to tell a story of a successful escalating campaign. You could use one of the Labor Notes case studies (see the list at the end of the section Turn Up the Heat below and in your curriculum packet) or use a story of your own.
- ☐ Have a participant prepared in advance to share a story of a strong escalating campaign.
- ☐ Prepare to share a story of a campaign featuring a strong union-community alliance, or use one of the following. If time allows, assign time to read a case study and answer the discussion question handout in groups:
 - *How to Jump-Start Your Union*, Chapter 6: Community Partners
 - “Bringing the Community to the Bargaining Table”
 - “Teachers Take on Student Discipline”
 - “West Virginia Teachers Launch Statewide Strike”
 - “Seven Steps to Open Up Bargaining”



- ☐ Supplies:
 - Flipcharts
 - Markers
 - Pens
 - Post-its

INTRODUCTION/ICEBREAKER (10 MINUTES)

Facilitators introduce themselves and the agenda.

[If performing as part of a workshop series, review lessons from Beating Apathy and Assembling Your Dream Team (Organizing is finding out what people care about, identifying leaders, drawing them towards the bullseye, and fighting together to win).]

In this workshop we're going to talk about turning an issue into a winnable campaign.

Icebreaker

Let's start by finding someone in the room you don't know yet and sharing with them an example of a time when you and your co-workers took on a workplace issue collectively and won. **[If applicable, you can refer people back to the Exercise: Track Your Victories handout that they may have filled out in Part 1.]**

Bring everyone back.

BONUS: EDUCATION THROUGH THE DECADES

Summary

This exercise adds time to the overall training agenda time. It can be an add-on to Part 3 or the full Secrets training if done in more than one day.

Total activity time: 30 minutes

Ask participants what decade they began working in the public school system. Group them by decades at the tables in the room. Give each group flip chart paper and markers. Then have them, as a group, discuss, chart, and present the answers to the following questions:

- What was teaching like when you started? What was working in the public school system like?
- How were teachers and support professionals treated?
- What was education policy like?
- What was the relationship between the union and the school district? The state education board?
- What was the state of teaching in your state and district? At your school?

Have each group present. Draw conclusions about how things have changed.

As a facilitator, summarize trends you observe.



Key Point

We've seen our public schools transform over time—in some ways for the better (examples) and in many ways for the worse both for teachers, support professionals, students, and communities.

Many gains were won for teachers through unionization and fighting for collective bargaining rights so that educators could be paid living wages, take parental leave, and have job security and a say in their workplace. They were won through taking action, often striking, to win.

Bring in larger discussion questions: What is the role of the union in fighting back against the corporate education model?

How do we strengthen our union to fight back?

WHY WE NEED CAMPAIGNS (10 MINUTES)

This workshop is about turning an issue into a campaign. First of all, what is a “campaign”? (*Probe for responses, flipchart responses.*)

A campaign is an action plan with a beginning, middle, and end, working towards a specific demand that we want to win. A campaign has a target, someone who can give us what we want. It usually involves a series of escalating actions (or tactics), which means that we progressively turn up the heat.

How many of us have been to an action that was awesome, but we didn't win, and we didn't have a plan for what to do next?

Facilitator can share a story of your own experience joining an action that wasn't part of a larger campaign, or draw one out from the audience.



Key Point

Campaigns are a way to identify in advance the ingredients we need to win, and put them together in a way that maximizes our chances of success. One isolated action may not be enough to solve the problem.

A good campaign creates increasing pressure on decision-makers over time by escalating the intensity and visibility of the tactics, and increasing the numbers of people involved. In this workshop, we're going to walk through the ingredients of how to build a strong campaign plan.

Ask:

Why would we want to organize a campaign to solve a workplace issue? Why not just file a grievance? **[A possible question to ask could be: “How many people here have done a march on the boss?”]**

Flipchart the answers. Ask for a few examples of actions people shared in the icebreaker.

What was the impact of taking action collectively?

**Key Point**

Campaigns help us to shift the balance of power in our workplaces and build members' confidence. Many issues that members care about can't be solved with grievances. Besides, grievances are invisible to most members, because they don't usually involve collective action. We need our actions to be participatory and public.

Let's look at an example of educators building a campaign around a school site issue.



Refer to Case Study: How Teachers Broke the Mold (5 minutes to read)

Why did the teachers at that school need to create a campaign rather than just bring their issue to the principal?

Flipchart the answers.

What actions did they include in their campaign?

**Key Point**

Some problems can't wait. Issues that harm students and school employees require fast and creative actions to create enough pressure to get the school district to fix them.

REVIEW: IDENTIFYING THE ISSUE (5 MINUTES)

Strong campaigns start with issues members care about. An issue is a workplace problem. Earlier we learned how to use conversations to find out which issues are getting our co-workers most worked up.

Since there may be many issues confronting workers on the job, we have to also think about what makes a good issue to organize around. Let's quickly review the criteria for what makes a good organizing issue:

- It is widely felt.
- It is deeply felt.
- It is winnable.
- It builds the union and builds leaders.
- It has a connection to students and the public.



Key Point

If you're just getting started and your union doesn't have a history of taking action, try to remember this: we want to pick issues that are **small enough to win, big enough to matter.**

MAKING A GAME PLAN (10 MINUTES)

Once we have identified a good organizing issue, we need a plan of action.



Direct participants to the handout Make a Game Plan.

These are the three basics of a plan:

- What exactly do we want?
- Who exactly has the power to fix the problem?
- What tactics can work?

Discussion:

Let's pick an issue that we could organize around. Someone shout out an issue in your workplace.

The facilitator could also suggest an issue that's been mentioned already in the training. After an issue has been suggested, walk through the four criteria to make sure it's a good organizing issue.

Now, what is our specific **demand**? What exactly do we want done to solve this issue?

If the demand is vague, push the group to get as specific as possible.

Does everyone agree that this demand will resolve the issue? Anyone disagree?

Continue the discussion until there is a clear consensus on the demand.

Next, who is the **decision-maker** who can give us what we want?

Again, push for specificity. Give our target a name.

There may be multiple targets for our given issue. The principal may have the power to fix certain issues while others can be fixed by the superintendent.

Let's think about our targets.

What do principals care about? What about the superintendent and school board members?

[For the purposes of this exercise, we want an issue that's winnable with the power we have at the worksite. If the target is too far up the chain, we might need to start over and pick a new issue where we can influence a target with the power we have right now.]



Key Point

If we don't know what we want, we can't figure out who can give it to us. We have to be very specific about who our target is, especially since there are often multiple targets or layers of decision-makers.

TURN UP THE HEAT (20 MINUTES)

Once we know what we want and who can give it to us, it's time to talk about tactics. These are the actions we will take to start putting pressure on our target.

What makes a good action?



Key Point

A good action should be:

- **Visible and public**, so that members are aware of what is taking place and the result.
- **Collective**, involving as many members as possible.
- **Confrontational**, shifting the balance of power by mobilizing members to challenge the decision-makers who can resolve the problem.



Direct participants to the handout: Checklist: Choose Tactics That Fit.

Small-Group Activity (5 min)

Break participants into pairs or small groups. Using the issue and target you agreed to in *Making a Game Plan*, have groups brainstorm a list of actions we can take to get the target's attention on our issue. Write down two or three of your action ideas on Post-It notes.

Thermometer exercise (10 min)

Bring the group back together.

Often to get the result we want, we need to “turn up the heat.” To think about how to do that, we’re going to create an action thermometer.

Unveil your Thermometer wall chart. Ask a representative from each pair or small group to place their actions on the thermometer, ranking them from “cold” to “hot.”

Pull out a few sample actions to discuss as a group. For each sample action, ask participants:

Tell us about this action and why you placed it where you did.

Ask the group:

Do you agree? Does anyone think this action should be “hotter” or “colder”? Why?

Use the exercise to discuss: “What does it mean to turn up the heat, and why do we do it?”

- Where would you start?
- What will you and your co-workers do next, if one action doesn’t win the results you want?
- What makes one action “hotter” than another action?
- Why escalate gradually?



Key Points

Why escalate gradually?

- **Take the high road.** By starting small, you show you are reasonable and credible. You did try asking politely.
- **It builds your group.** If you start off with low-intensity actions, members who have never said boo to the principal before will be more likely to participate. As your actions get more intense, make sure not to leave people behind.
- **Strength in numbers.** If you leap straight into high-intensity actions and only a few people participate, it’s easy for your employer to single them out. If you start smaller and build, you can achieve greater participation.
- **Each action has a greater impact than the action before.** As your actions get more and more intense, managers begin to understand that you mean business. You also keep them guessing.
- **Don’t play your aces too soon.** If you do your worst first, there’s nowhere for your campaign to go but down. It’s more effective when principals or the district can see there’s a lot more to come—and there’s still time to save themselves a headache by giving in.

Example: (5 min)

Tell the group a story about a campaign where educators defined the issue, demand, and target, and turned up the heat with escalating tactics. You could use your own story, or one of these case studies provided in the back of this curriculum:

- Seven Steps To Open Up Bargaining
- Bringing The Community To The Bargaining Table
- Teachers Take On Student Discipline
- West Virginia Teachers Launch Statewide Strike

CAMPAIGN MOUNTAIN (10 MINUTES)

Overview (5 minutes)

Unveil your Campaign Mountain.

When you think of your whole campaign, think of it as climbing a mountain where each action is higher than the last one. The top of the mountain is our strongest action, the peak of our strength—for instance, a strike.

This is a tool we can use to map out a campaign to win stronger language in our contracts, or a series of actions to win a specific workplace demand, or even a series of mini-campaigns that work together toward a larger objective.

The Campaign Mountain gives us a way to imagine what it will take for our target to give in to our demand. We can then work backwards from what we imagine the peak of our strength will need to be, and plan out what we need to do and in what order.

The Campaign Mountain has five parts:

1. The **foundation** is where we have one-on-ones, identify issues and leaders, and build the organization. It is also where the union plans out the campaign, identifies targets, and makes a timeline for tactics.
2. The **kickoff** is the public launch of the campaign. It can start with a low-level action.
3. The **escalation period** is where members turn up the heat by taking actions that gradually get more intense.
4. The **peak of our strength** is the most intense action we are building towards—our most powerful weapon.
5. The **resolution** is when we win what we want or strike a deal.

Connect back to Turn Up the Heat (5 min)

Where do some of the tactics we just brainstormed for our mini-issue fit into the campaign mountain?

Pull out a few tactics to test with the group. Reinforce:

Organizing conversations and mapping your workplaces are the key steps you need in the foundation phase to be able to escalate and take collective action.

What happens when we try to take shortcuts without laying the foundation? For example, suppose you call for a sticker day without having done the groundwork—and no one wears the stickers. How does this look to the principal?

Emphasize:

The boss doesn't know how far we will go, and we want to keep them guessing.

After every action, it's important to regroup and assess how it went. This helps us to plan our next steps.

Ask:

What are some examples of campaigns you have been part of? What types of actions did you do at the different stages of the campaign?



Ideally you will have prepared a participant in advance to share a story of a strong escalating campaign. If none is available, refer to case studies provided in this curriculum.

PLAN YOUR CAMPAIGN (25 MINUTES)

Break participants into small groups. Ask each group to choose an issue, identify a target, and plan a campaign with escalating actions. Encourage people to make a plan for something they are actually dealing with. If people are participating from the same local or workplace, work together. If people are participating from different unions and/or workplaces, they should pick only one to focus on.



Share: Campaign Planning Template

Point out the blank Campaign Mountain on the back of the Campaign Planning Template or hand out flipchart paper so participants can draw their own. Remind participants that the Campaign Mountain helps us place our tactics on a timeline. Encourage participants to think about the leverage actually required to win: what action are they building to as their peak of strength? It can be helpful to work backwards from there. Also consider strategic dates in the calendar (e.g. school board meetings, the start of the school year, when report cards are due, parent-teacher meetings). Encourage them to translate the tactics they come up with onto the blank Campaign Mountain.

Small Group Work (15 min)

Facilitators should walk around the room to ensure groups are not getting stuck on defining their issue and formulating their demand. Push people to decide that quickly and move on to the target and actions. Consider asking groups to report back on their issue, demand, and target at set intervals to ensure groups are moving forward.

Discussion (10 min)

Ask a few groups to report back on their campaign plan. Each group should share the specific demand, target, peak of their strength, and a few of their favorite tactics. Pick a group that had a detailed campaign plan.

Ask:

- What do you think it would take for your target to give in?
- Do you have enough capacity to impose that cost? Do you have to build to it? How do you plan to do that?

When you hear a group with a particularly strong campaign plan, write down two to three of their tactics on Post-It notes as they are reporting back.

Ask the group to show us where they would place these two to three tactics on the blank Campaign Mountain at the front of the room.



[If performing as a workshop series refer to Organized People Have Power and connect with the following Key Point.]

[If performing as a stand-alone workshop, hand out and walk through Organized People Have Power. Stress the role of the organizer in identifying issues and leaders in the Foundation Period of the campaign. Subsequent actions test leaders and grow participation in the union. Connect to the following Key Point.]



Key Point

Lasting power is the goal, not just a one-time win. Remember to aim for the bullseye—campaigns should help us shift power in the workplace and draw more members towards the bullseye, not just for one action, but for the long term.

Campaigns are also an opportunity to build a permanent structure in the workplace—with strong leaders—and a solid member-to-member network that can mobilize members for action.

As organizers we should always be thinking more than one step ahead.



COMMUNITY MAPPING (25 MIN)

Why We Need Allies (5 min)

This training is about organizing our workplace and building our union. But more and more we know we need to expand our organizing beyond members to defend our jobs, raise wages, and improve our public schools.

Refer back to tactics people shared in either the thermometer exercise or one of the campaign plan examples. Pull out any tactics that included community allies or the media.

In _____ *[insert example]* we talked about reaching out to _____ *[church leaders, parents, the media, etc.]* Why did you feel that was important to win our demand?

Brainstorm reasons and flipchart why we need allies.

What are some things principals care about the most? What are some things school boards care about the most? Superintendents? What about state legislators?

Flipchart answers.

Different decision makers care about different things.

Some principals care about pressure from parents. School board members often care about getting re-elected. Superintendents might care more about the budget.

Education union demands for smaller class sizes and increased staffing will improve members' working conditions, but they benefit students and the public as well.

We are in a stronger position when we involve parents and community allies in our fights; it requires working together, building long-term relationships and involving allies in decision making process as well as in our campaigns.

Case Study (5 min)

Share an example from your own experience of a campaign that involved parents or built strong community alliances, or an example that you know about from the local context. We have included some longer case studies as possible examples.

Alternatively, use a clip from a video that highlights a successful community alliance.

Community Mapping (15 min)

Often we think we can only build these relationships at the top of the union, but our co-workers and members are often the greatest resource for connecting to community allies. We are also community members, parents, and people of faith. We are involved in many different kinds of organizations and have a web of rich connections.

Let's go back to the example we used in our Turn up the Heat exercise and go through a series of questions:

Remind people of the issue, the demand, and the target in the Turn up the Heat exercise.

Brainstorm and flipchart answers to each question:

- Beyond our immediate workplace, who else cares about this issue because they also have a stake in what's going on?
- Who does our target care about? Who has influence over him/her? (Expect parents to come up.)
- Often we talk about bringing parents into a campaign as a tactic. Did some of you include that in your campaign plans? What's the difference between involving parents to pressure a decision-maker (the principal) vs. involving parents as allies or partners? What are the benefits/downsides of each, if any? (Answer: parents and community can become long-term allies instead of one-time supporters.)

DIFFERENT TYPES OF ALLIANCES

- **Weakest—“Please come support us!”**

Some people will come help, because they like us or because it is the “right thing to do.”

- **Medium—“You help us on *this* and we’ll help you on *that*!”**

Scratch each other’s backs: It does help for your ally to know that you will return the favor. It’s stronger than a one-way relationship, but people will only go so far just to help you with your issues.

- **Strongest—“We’re in it together!”**

Solidarity: We are both being harmed. Working together and supporting each other is the only way to fix it. “Supporting you helps me win, too.”

Excerpted from Chicago Teachers Union training materials



What are some ways we engage parents already? What are times and places to talk to parents at your school or in your district about an issue?

Brainstorm list.

Ideas:

We have a list of potential allies that we want to build relationships with. But how do we know how our members might be connected to these organizations and community leaders?

A brief survey is one tool you can use to map your co-workers’ existing relationships.

*Hand out **Community Mapping Survey** and run through questions.*

Has anyone used a survey like this before? How did you use it?

How could you integrate this into the foundation stage in the Campaign Mountain?

Ideas:

- At a building meeting ask everyone to fill out a survey. At the next meeting compile the results and discuss them as a group.
- Ask building representatives to get members to fill out surveys when they are having organizing conversations.

Once we know connections our members have, how do we connect those relationships to our campaign?

Brainstorm list.

Ideas:

- Have members set up one-on-one conversations with community leaders.
- Make a plan on who to contact, who will do it, the timeline, and the ask.
- Reach out to other unions that represent school employees in your district to find common issues.
- Ask to talk about the union's contract fight in a community meeting or faith service.
- Participate in coalitions, ask what support is needed, and bring updates and requests back to the union.
- Mobilize members to go to actions organized by other unions or community groups.

Share an example of a union that worked with members to explore community relationships and alliances.

Refer back to the case study or solicit an example from the room. It's best if this is solicited prior to the workshop, so the participant can be prepared.



Key Point

We can start where we are and build from there. Just like engaging and connecting with union members in order to bring them closer to the bullseye, the building blocks are the same: having conversations and building long-term relationships.

Our goal should be build long-term alliances that extend beyond a specific campaign, where we are working together and supporting each other.

WRAP UP (5 MIN)

Recap key concepts:

We talked about how a campaign is a series of escalating actions that get our target to say yes on a specific demand. We talked about how a strong campaign needs a demand, a target, and tactics that will work.

To get the result we want, we often have to turn up the heat. Thinking about our campaign as a mountain with escalating actions and working backwards from the peak of our strength is a helpful way to keep us on track.

Finally, a key part of a building successful campaigns and broader movements is developing long-term alliances. We can start with the relationships our members already have.

Closing

*If enough time is available and energy remains for an exercise that allows for deeper practice with organizing conversations, then consider ending with the **AHUY** closer.*

*If enough time remains for a reflection and summation activity, consider ending with the **Head, Heart, Hands, Feet** closer.*

HEAD, HEART, HANDS, FEET EVALUATION EXERCISE

Summary

This is a closing activity that can be used as a quick evaluation and to have participants reflect on their experiences in the workshop.

Setup

Draw a head, a heart, a hand, and a foot on four different sheets of flipchart paper and tape them up on walls around the room.

Total activity time: 10 minutes

ACTIVITY

Hand out colored Post-It notes to participants.

We'd like to hear your thoughts on how you are feeling as we wrap up the workshop, and get your feedback so we can continue to improve the training.

*Ask participants to write on one color of Post-It note **something new they learned in the workshop**. This will be placed on the HEAD flipchart.*

*Ask participants to write on a second color of Post-It note **something they are feeling right now**, after completing the workshop. This will be placed on the HEART flipchart.*

*Ask participants to write on a third color of Post-It note **something they would improve for next time**. This will be placed on the HAND flipchart.*

*Ask participants to write on a fourth color of Post-It note a **next step they are planning to take after the workshop**. This will be placed on the FEET flipchart.*

If there's time, the facilitator can ask a few people to share their responses. It's often nice to close by having people call out what they have written on their HEART Post-It notes.

Ask participants to place their Post-It notes on each flipchart.

AHUY CLOSING ACTIVITY

Summary

This is a closing activity for the day-long training including all three workshops.

It attempts to weave together different components and materials from all three workshops and provide an opportunity for participants to again practice their organizing conversations.

Setup

Before the beginning of the third workshop, Turning an Issue Into a Campaign, tape signs up on the wall reading, “A (Anger),” “H (Hope),” “U (Urgency),” “Y (You)” on the wall.

Under “A (Anger),” place the workplace issues that were identified in Beating Apathy.

Under “H (Hope),” place the Exercise: Track Your Victories handouts that have been filled out over the course of the day.

Under “U (Urgency),” place a date. For example, write “Tuesday.”

Under “Y (You),” place the tactics that you brainstormed in Turning an Issue Into a Campaign.

Total activity time: 20 minutes

ACTIVITY

Walk over to the wall and review the organizing conversation rap. Talk about the different components you have placed under each letter, revisiting the key concepts from the workshops and connecting them to the bullseye.

Ask if there are any additional Track Your Victories handouts that anyone would like to add under “Hope.”

*Ask participants to use the information provided—the victory worksheet they completed and the tactics discussed—to role play the organizing conversation from *Beating Apathy* with the partner they had in the morning.*

If they prefer, the pair can come up and quickly match an (A) Issue to a (H) Victory to a (Y) Tactic and then practice having an organizing conversation based on their selection.

Tell each pair to divide into a worker and an organizer and to role play. They have six minutes each. At the end of six minutes, there will be an announcement to switch roles.

ACTIVITY

After both people have an opportunity to practice, bring everyone back together. Ask for feedback:

- How did you feel connecting these different parts together?
- Was there any particular part of the conversation you found to be challenging?
- Anything you would do differently next time?
- How prepared do you feel to have these conversations back in your workplace?

SECRETS OF A SUCCESSFUL ORGANIZER

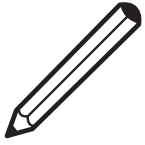
HANDOUTS



SEIU Local 205



SECRETS OF A
SUCCESSFUL ORGANIZER
BEATING APATHY



EXERCISE: TRACK YOUR VICTORIES

Think about an example where collective action worked to solve a problem in your workplace.

Issue: What was the issue your co-workers were concerned about?

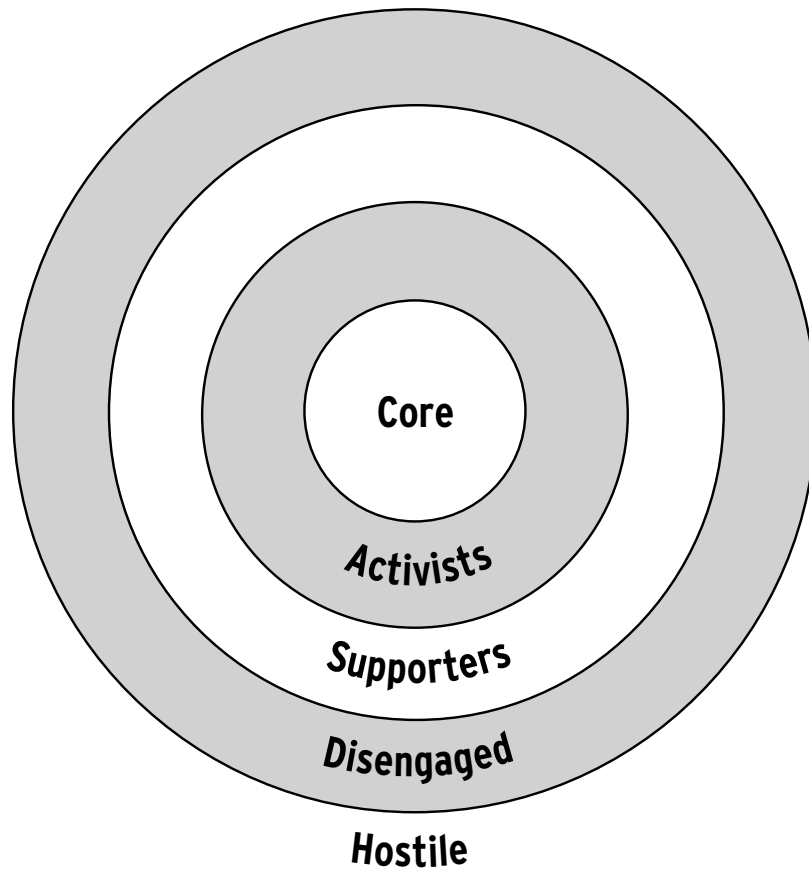
Action(s): What action(s) did you take? Who was involved?

Result: What happened? Was the problem solved?



AIM FOR THE BULLSEYE

From the organizer's point of view, think of your fellow members distributed on a dartboard. Your goal is always to move people one step closer to the center of the circle.



- **Core group:** These people are always thinking about organizing and how to get others involved, even on their time off. They might be elected leaders or shop stewards, or not.
- **Activists:** These people can be counted on to help when an issue heats up. They will take responsibility to get the word out and will ask other people to take action, too.
- **Supporters:** These people will wear a button or sign a petition, but don't take responsibility for getting anyone else involved.
- **Disengaged:** These people don't see the union as a factor in their lives, so they don't participate.
- **Hostile:** There are also people outside the circle who aren't just uninvolved—they're hostile to the union. Don't waste your time arguing with the haters. Maybe one day something will open their eyes, but it'll probably be an experience, not a debate, that does it.





Excerpt from
*Secrets of a
Successful
Organizer*



ORGANIZING IS AN ATTITUDE

Organizing is first of all an attitude. It's the attitude that you and your co-workers together can *do something* to make things better. It's the attitude that action is better than complaining. It's the attitude that problems are just waiting for a solution, and that strength in numbers is part of that solution.

It's the refusal to be discouraged—at least not for long. It's the willingness to listen to others with respect, so that the plan you come up with reflects the good ideas of many people.

If you have the organizing attitude, you feel it is *necessary* to respond to unfairness. You are committed to building power with your co-workers, not just talking about it. You believe in collective action and want to get better at putting others in motion.

THE ORGANIZING ATTITUDE

- Action is better than complaining.
- Problems are waiting for solutions.
- Solutions are collective, not individual.
- People can be brought together to make things better.



United Teachers Los Angeles



Excerpt from
*Secrets of a
Successful
Organizer*



APATHY ISN'T REAL

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

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

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

Sound familiar? It might feel like your co-workers don't care. But push a little bit, and that's never really true. Everyone cares about something at work. Just about everyone cares about their wages, for instance. Everyone wants respect. No one's indifferent to whether their shift is miserable. It's impossible not to care.

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

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

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

When you're assessing why more people haven't stepped up to take on the boss, it's important to find out the actual reasons. You have to diagnose the problem before you can write the prescription. It's not apathy—but what is it?

Step back from your frustration and look at things from an organizing perspective.



HOW THE BOSS KEEPS US DISORGANIZED

Whether its the principal, superintendent or a higher up, what holds people back from confronting the boss about workplace issues? Instead of blaming “apathy,” it’s important to find out the actual reasons. You have to diagnose the problem before you can write the prescription.

This chart shows four common obstacles the boss relies on to keep us from getting organized—and how you can help your co-workers get past them:

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





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.





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 the principal to retaliate against me 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, its true our principal might be mad when we show and tell him he's treating veteran employees unfairly. That's why we're all going to his office together with a petition signed by everyone in the building, so he wont be able to single anyone out.

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.

You told me earlier that he principal is always picking favorites and punishing some of us without rhyme or reason. If we don't stand up to him, when will it end?

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.





INOCULATE YOUR CO-WORKERS AGAINST THE BOSS'S TACTICS

Whenever you take action at work, you can expect management to fight back. Inoculation is the part of the organizing conversation where you prepare your co-workers so they're not caught off guard.

1. Ask questions about how the boss will react.

Do you think the principal wants a group of us showing up at his office? Why not?

When he finds out we are organizing, how do you think he'll react?

What do you think he might do to try and stop us?

2. Discuss *how* the boss will fight.

- If you're preparing for a meeting with the principal, expect pushback on who gets to speak and what is discussed.
- If you're packing a school board meeting, expect the board may try to limit public comment opportunities or line up speakers to parrot their position.
- If you're planning a union sticker day, expect to be told you're not allowed to wear the sticker. In fact, any time you confront a boss with a new tactic for the first time, you will hear, "You can't do that."

3. Be sure to know your rights under state law and your contract and inform your co-workers what their rights are, and how to react when they're denied.

State labor law protects our right to wear a union button at work.

If principal or administration tells you to take off the button, write down the date, the time, who witnessed it, and let your building rep know.



4. Discuss *why* the boss will fight.

This step is most important. Help your co-workers understand that every workplace fight is about power.

*We're not simply
building power—we're
taking power from our
principal.*

*Any time we challenge
the principal or
administrations control,
we can expect resistance.*

5. Recommit.

Ask your co-worker whether any of this has changed her mind:

*Are you still serious
about solving this issue
by coming with us to
deliver the petition?*

If yes:

*Great! We're meeting
in the lounge on
Thursday at 1:45.*

Your co-worker has strengthened her resolve by making this commitment out loud to you—and to herself. Later you can remind her of this conversation.

If no:

*What's holding you
back?*

It's OK if your co-worker expresses some doubts now. She's getting real with you. This gives you the chance to ask more about her concerns, address her fears, and remind her about the issue she cares about. If she doesn't take action, is that problem going to solve itself?





SECRETS OF A SUCCESSFUL ORGANIZER

ASSEMBLING YOUR DREAM TEAM



EXERCISE: WHY WE NEED LEADERS TO ORGANIZE

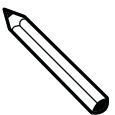
Imagine a scenario where there is an urgent need to take on a fight of some kind. For instance, suppose a well-loved leader at your school has been fired, and you're planning a sticker day to demand she be rehired. You have 24 hours to get the word out to everybody and get the sticker into everyone's hands:

Use the following questions to make a plan for your sticker day.

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

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





EXERCISE: IDENTIFYING LEADERS

Background:

You are a building rep at the Twin Pines Elementary School, and are trying to restart the school site committee. The committee used to have 10 members, but hasn't been meeting for awhile. You would like to recruit some new leaders to the committee.

Instructions:

Read the profiles of the contacts you make and the information they share with you. You have 10 minutes to determine who you think you want to recruit as a leader. Develop consensus in your group about who are the best prospects to recruit. Rate the three best prospects (1 = the best).

1. _____
2. _____
3. _____

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

Organizing is about making choices!

Contact 1

Brenda Hammond

Time at school: 15 years

Issues: After 14 years teaching 5th grade, the principal moved her to 1st grade with no explanation. She is worried she's being pushed out.

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

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

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



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

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



Contact 2

Sally Rivera

Time at school: 4 years

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

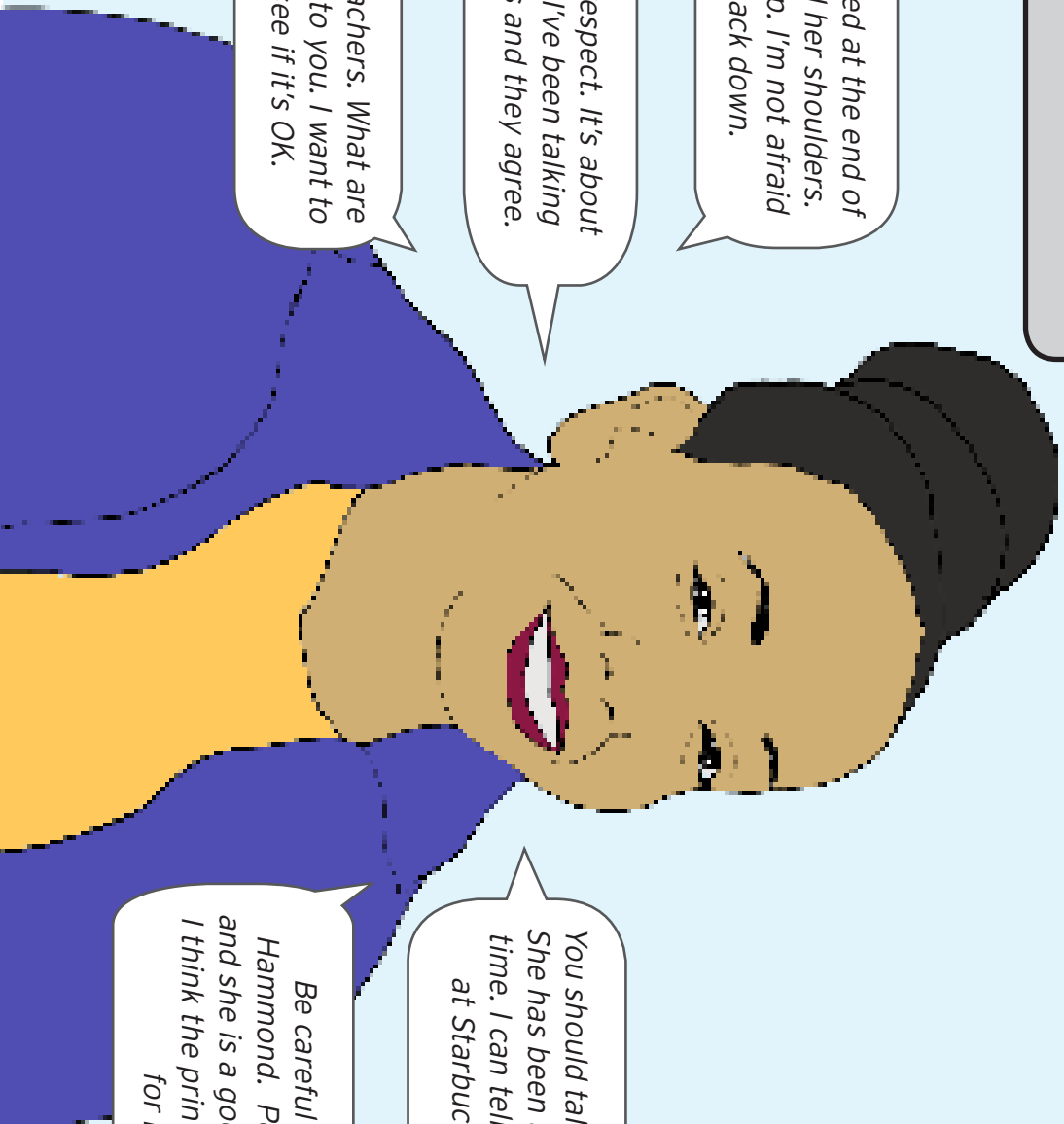
I told the principal I'm exhausted at the end of the day and she just shrugged her shoulders. I'll tell you one thing, I'm fed up. I'm not afraid to speak up and I won't back down.

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

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

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

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



Contact 3 Eve Winters

Time at school: 12 years

Issues: The workload is too high.

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

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

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



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

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



Contact 4

Francis Powers

Time at school: 8 years

Issues: Pace of work

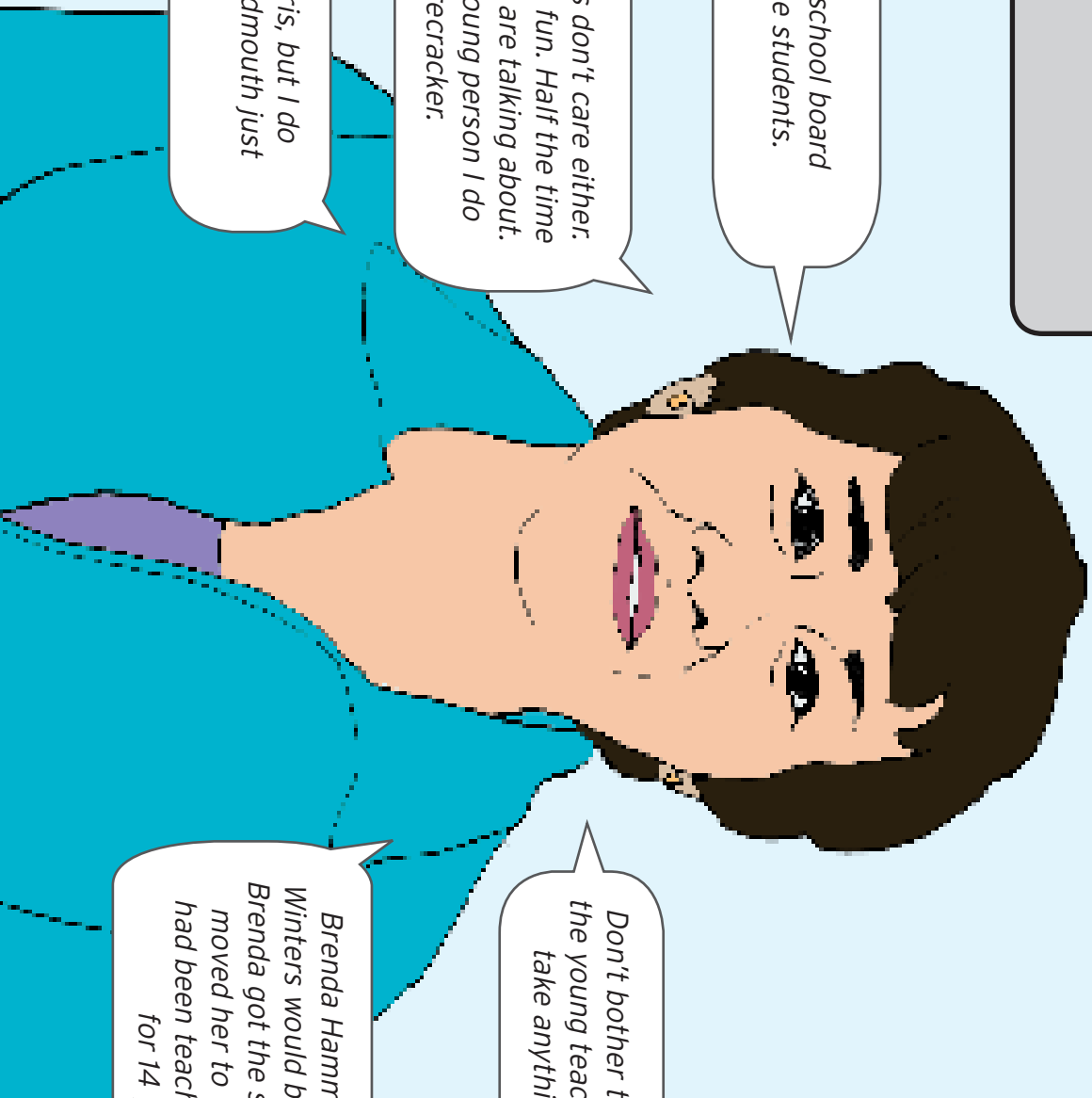
We're just victims here. The school board doesn't care about us or the students.

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

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

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

Brenda Hammond and Evie Winters would be good leaders. Brenda got the shaft when they moved her to 1st grade. She had been teaching 5th grade for 14 years!



Contact 5

Cindy Thomas

Time at school: 3 months

Issues: Disrespect from the principal.

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

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

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



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

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





QUALITIES OF A GOOD ORGANIZER

- Effective organizers are **good at their jobs and respected** by the people they work with.
- They have the **trust of their co-workers**. Their opinions carry weight. When they offer advice, people listen.
- The best organizers are motivated by a **strong sense of justice** and clear principles.
- They're **responsible, honest, and compassionate**.
- They're confident, even **courageous**.
- Organizers must be **good listeners**. They know you don't have to be the most vocal to have the biggest impact.
- They **bring people together**, welcoming new co-workers on the job and looking for ways to involve every member.
- Organizers **move people to collective action**. They don't just solve problems alone—they equip their co-workers to solve problems together.
- They put the **interests of the group first**, ahead of their individual concerns.
- They don't operate as lone rangers. They **respect group decisions**.
- Good organizers are **knowledgeable about their contract**, but not afraid to admit when they don't know the answer.
- They can stay **cool under pressure** and handle stress and conflict.
- They're willing to **stand up to management**—and they can inspire others to stand up for themselves as well.

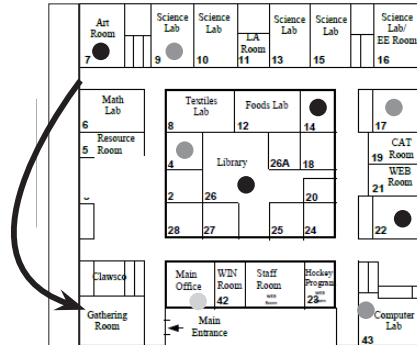




EXERCISE: MAP YOUR WORKPLACE

You will need:

- Butcher paper
- Color markers
- Sticky dots



- Union activist
- Principal
- Not yet involved

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.





TEN QUESTIONS TO ASK WHEN MAPPING YOUR SCHOOL

1. **Grapevines.** What paths do people travel? Who can walk freely through the whole workplace? How does news travel?
2. **Bottlenecks.** Are there spots where the flow of work gets bottlenecked? These could be important pressure points. Who works there?
3. **Work groups.** What work groups can we identify on this map? Consider the factors that determine who works together at your school, such as job, work area, and time of day.
4. **Relationships.** Which work groups have contact with each other through their jobs? Which groups are hard to reach? Which groups have contact with other schools in the district?
5. **Social groups.** What social groups can we identify on this map? For instance, who carools together? Who speaks the same language? Who socializes at lunch or outside work? Who's related? Who are all the smokers?
6. **Group concerns.** For each work or social group, how does this group relate to the principal and administration? What are the biggest problems affecting this group?
7. **Water coolers.** Where do people congregate? These could be good places for outreach conversations, or group gatherings.
8. **Broom closets.** Where can you talk out of sight of the principal?
9. **Hangouts.** Where do people go after work?
10. **As time goes by.** What on this map changes at different times of day, and week?





EXERCISE: DRAW YOUR OWN MAP

Refer to the handouts *Map Your School* and *Ten Questions to Ask When Mapping Your School*. Draw your own workplace map in the space below.





EXERCISE: MAKE A CHART, TOO

After making a physical map of your workplace, you can keep track of the essential information in a chart. Charts are easy to update and help you monitor your organizing progress and see where the gaps are.

Keep it simple. Create a spreadsheet, using a computer program such as Excel or Google Sheets. Enter one row for each worker, even people you don't have much information about. Make a column for each bit of information you want to track, such as:

- First name
- Last name
- Cell phone
- Email address
- Job title
- Floor/Area
- Days/Hours on Site
- Date of hire
- Top issue
- Union member?
- Building Rep?
- Contract action team member?
- Completed bargaining survey?
- Attended training on X issue?
- Attended rally on Y date?
- Signed up or recruited a new member?

Keep it up to date. Charts are only as useful as they are accurate. Print out a copy of your chart to carry around with you. Continually update it, and enlist co-workers to help. This can include filling in gaps in contact information, adding people who are missing from your list, and removing those who have quit, gone on leave, or changed assignments.

Make a wall chart. Also make a big version of your chart to display on the wall, with all the names grouped by floor/area, job, and other key groupings. Color-code it to show your organizing progress, so you can see at a glance where your union is weak and where it's strong. For instance, highlight everyone who has committed to attend a rally, signed a petition, or worn a button. Put a dot beside the name of each steward, activist, or contract action team member.

SAMPLE CHART

First	Last	Work area	Job	Days at School	Cell phone	Email	Years at school	Building Rep	Safety petition 10/31	Grievance training 11/10
Wanda	Smith	1st floor	ELA Teacher	Mon-Fri	123-456-7890	wandasmith@123.com	15	X	X	
George	Hernandez	2nd Floor	Band	Tues, Fri	234-567-8901	ghernandez@123.com	5		X	X



Label these columns yourself with actions or other info you want to track.

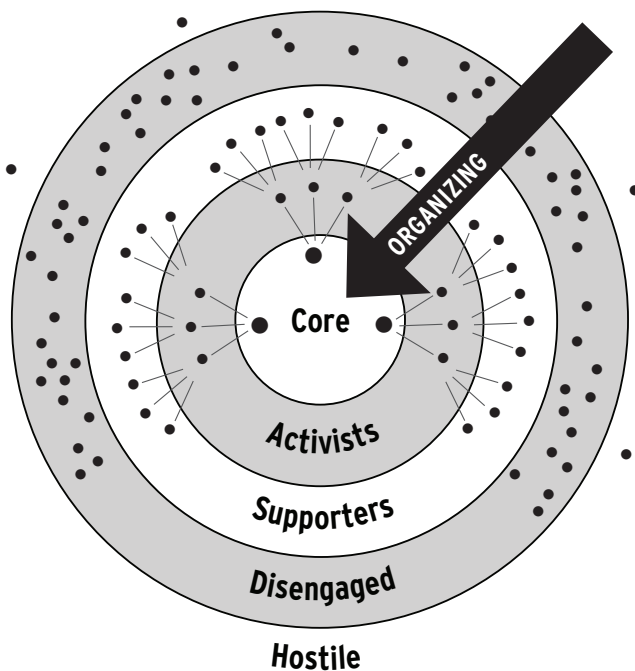
[illegible]



ORGANIZED PEOPLE HAVE POWER

- A. The other side of this page shows how the boss structures the workplace. Managers and supervisors are organized in a hierarchy, and this helps them wield power over a disorganized workforce.
- B. Steps 1, 2, and 3 show what you can do about it. A workplace organizer seeks out leaders who have their co-workers' respect, and recruits these leaders to form a committee that knits the whole workforce together.
- C. Fold along the dotted line to see the result. Together, organized workers have power—enough to challenge the organized power of management.

AIM FOR THE BULLSEYE



Another way to visualize your progress is to picture your co-workers distributed on a dartboard. In the center is the **core group**, people who are always thinking about how to get others involved.

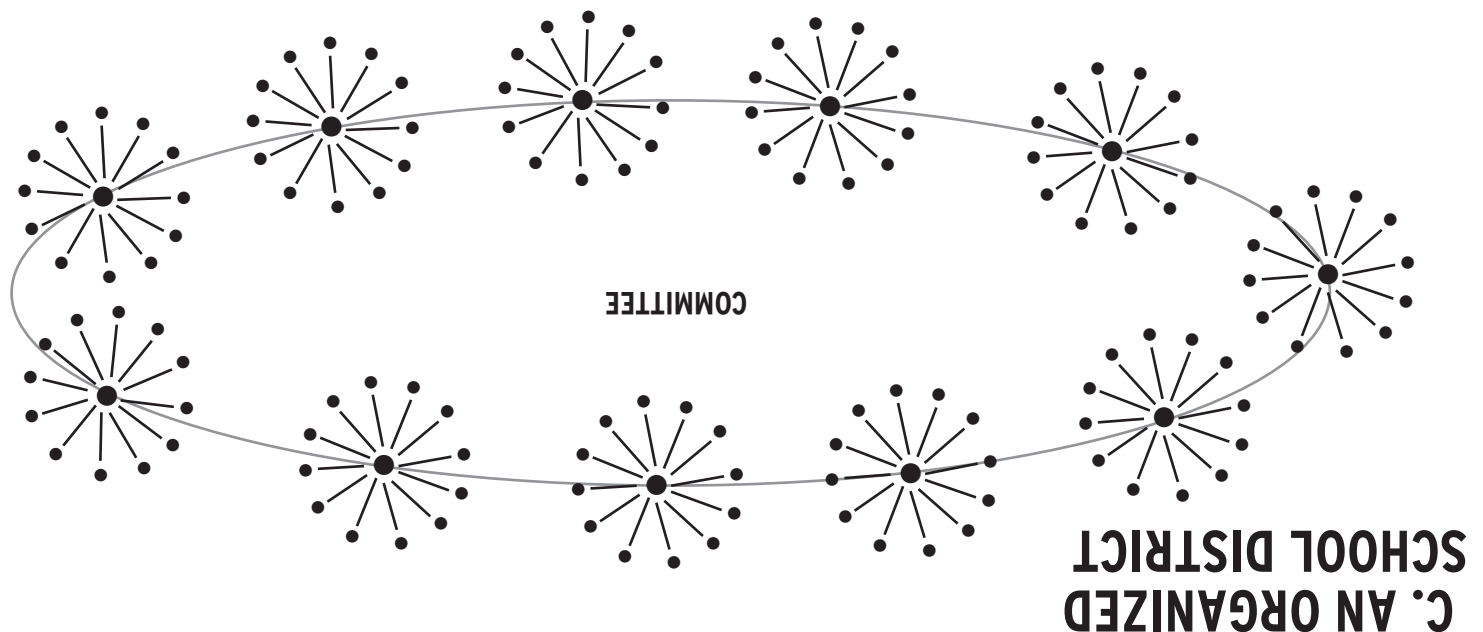
In the first ring are **activists**. When an issue heats up they will take responsibility to get the word out and ask other people to take action, too.

In the next ring are **supporters**, who will wear a button or sign a petition. The **disengaged** don't participate at all.

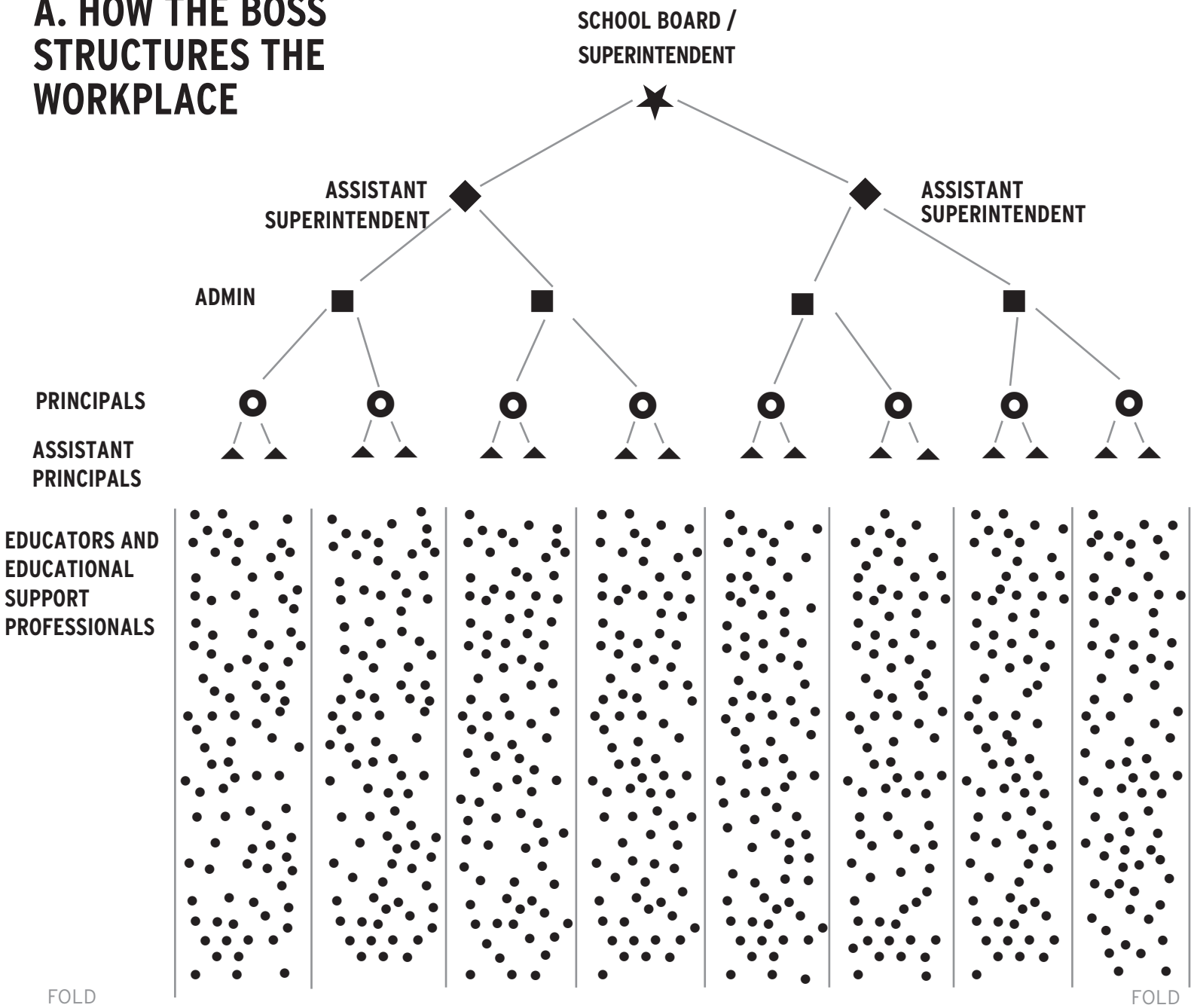
Once you get enough leaders working together in the core and activist circles, your network can reach everyone. As an organizer, you're always looking for ways to move people closer to the center, one step at a time.

FOLD

FOLD



A. HOW THE BOSS STRUCTURES THE WORKPLACE



B. HOW WE ORGANIZE OURSELVES





SECRETS OF A SUCCESSFUL ORGANIZER

TURNING AN ISSUE INTO A CAMPAIGN



HOW TEACHERS BROKE THE MOLD

"Our school was old and had not been well maintained," writes Steve Hinds, who was a teacher in New Haven, Connecticut. "We noticed that many teachers were suffering from sinus problems, headaches, and other respiratory illnesses. A group of teachers met to decide what to do.

"We decided to file a grievance, and got over 90 percent of the teachers to sign it in a single day. While gathering the signatures, we also conducted a health survey, and found that more than 70 percent suffered from symptoms related to air quality.

"There had been little grievance activity for years, so we could start fresh." The teachers formed a Grievance Committee, welcoming anyone. It held weekly meetings, produced a newsletter, and kept in daily contact with the parents' organization.

Using an information request, the committee forced the city to hand over a study of the school's air quality. "The report showed that the city knew there was a mold infestation in our building," Hinds writes.

"Our demands were simple. We wanted the city to do what its own report concluded it should have done six months earlier—fix the roof leaks that let moisture in, remove moldy ceiling tiles, and clean the walls and floors with bleach solution.

"We gave the city a deadline to agree to a reasonable completion date, followed by a walk-through by teachers and parents to inspect the completed work. The city indicated it was working on the problems, but wasn't formally agreeing to anything."

So the teachers decided to organize a meeting with parents. To publicize it, the next day teachers wore surgical masks to school.

"What a day it was," Hinds remembers. "We didn't even need to call the newspapers and TV stations to attract attention. Word got out through student cell phones, and the cameras and reporters were at the school doors by 9 a.m.

"Parents who heard about the masks were calling downtown with their concerns. City officials were furious, and the superintendent showed up to bully us. Most of the teachers simply walked out of this meeting.

"The city agreed to our timetable by the end of the day. The following day, a crew went through the building room by room to create a master list of work to be done. This list led to some 1,000 work orders. More work was done to improve our school building in those few months than had been done in the previous two decades, and health complaints by teachers and students gradually eased."

Through this campaign, Hinds wrote, "we developed leadership and negotiating skills in 15 members who previously had had no experience. And we built credibility with parents, who saw that the union was not interested only in salaries. We went on to form a Contract Organizing Group to pressure the local to fight for smaller classes."



A GOOD ORGANIZING ISSUE

- **Is widely felt.** How common is the problem? How many workers face this situation? Many people must feel that this is a real problem and agree with the solution you're pursuing.
- **Is deeply felt.** Is this an issue that people feel strongly enough about to actually do something? It's not enough that many people agree, if none are really hot under the collar.
- **Is winnable.** It's hard to know for sure whether you *will* win, but it's possible to have a good idea whether you *can*. Your group should match your demand to the power you've already got.

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

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

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

- **Has a connection to students and the public.** If the issue affects students, parents and community, it grows your potential group of activists and the potential support.



MAKE A GAME PLAN

Once you've identified a good organizing issue, you need a plan of action.

THE THREE BASICS OF A PLAN

- 1. What exactly do you want?** It's amazing how far along folks can be in a campaign without having identified what solution they're after, and whether or not it's winnable.
- 2. Who has the power to fix the problem?** It's not enough to say "management." Figure out which person in management could say yes to your solution.
- 3. Which tactics can work?** Aim your actions to build the pressure on the decision-maker you've identified. Consider how much pressure it will take to win, and where your leverage is.





CHECKLIST: CHOOSE TACTICS THAT FIT

Your escalating campaign is made up of many tactics. A tactic could be mild, like a survey, or militant, like a work slowdown. It could be traditional, like a picket, or it could be a creative stunt a member just dreamed up. When your group is weighing what tactic to try next, here are some factors to consider:

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





TURN UP THE HEAT: ACTION THERMOMETER

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

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

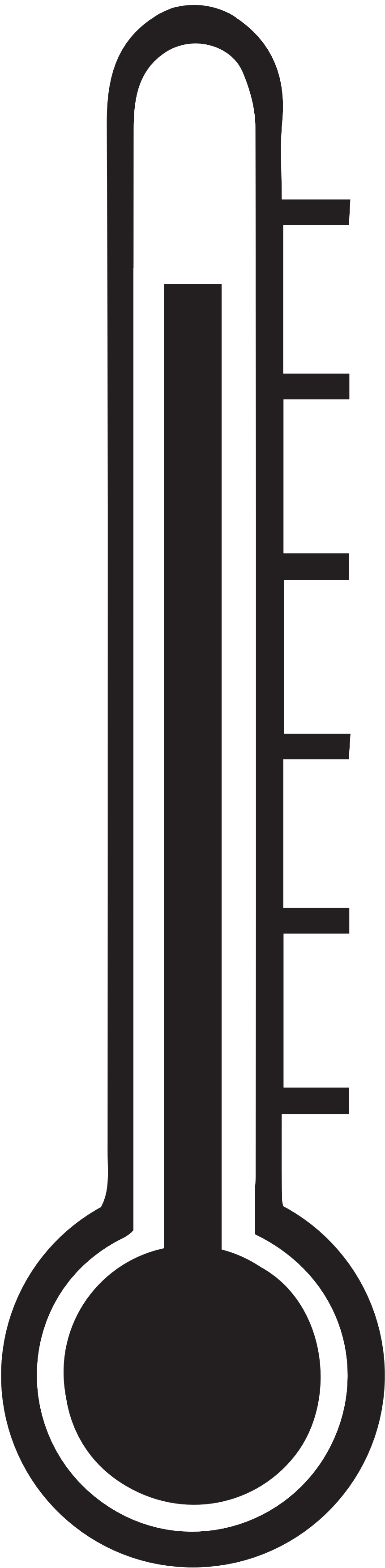


14. Walked out of a meeting en masse
13. Spoke to the media
12. Pulled a publicity stunt
11. Called a meeting of supporters
10. Used the result to formulate specific demands, with deadlines
9. Filed an information request
8. Reached out to parents
7. Published a newsletter
6. Formed a grievance committee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





TURN UP THE HEAT: ACTION THERMOMETER



CAMPAIGN PLANNING TEMPLATE

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



CAMPAIGN MOUNTAIN

Phases of a Campaign



COMMUNITY MAPPING SURVEY

Name: _____
School: _____

Date: _____
Department/Job: _____

Members are often the greatest resource for connecting a union to community allies. We are not just workers—we're also community members, parents, people of faith, and members of many kinds of organizations. By mapping out rich web of connections we can start to build a broader movement.

1. Do you or your family attend any kind of religious institution?

Name of religious institution:

Address:

Name of pastor/imam/rabbi/other:

2. What groups or clubs are you or a member of your family involved in? (Be specific)

Faith Group:	Professional Association:
Parent Teacher Association:	Neighborhood Group:
Sports League or Team:	Immigrant Association:
Kids Athletic Club:	Board:
Civic Organization:	Fraternity/Sorority:
Parent In The District:	Other:

3. Do you or members of your family volunteer for anything that you have not already listed?

4. Which of your family members live in the area? What do they do? What union affiliations do they have?

5. Do you have any other connections to anyone in your community who has some kind of community profile or connections? Judges, journalists, elected officials, etc?

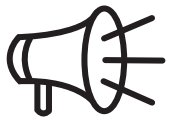
Worker cell phone:
Worker email:
Filled in by:

SECRETS OF A SUCCESSFUL ORGANIZER

CASE STUDIES



CLEAN Carwash Campaign



CASE STUDY #1: A UNION SCHOOL

Teachers at Kelvyn Park High School in Chicago have transformed their school into one where the whole staff feels the union is strong, members are unafraid to speak up, and leadership is shared.

“The union is very present,” said longtime steward Jerry Skinner. “We have a history that everyone is aware of.” That history includes 100 percent participation in the 2012 strike and many confrontations with difficult principals.

New staff learn about the union right away, because members have transformed their lunchroom into a union hall. The latest union newsletters and copies of *Labor Notes* are available. Newspaper articles about the union’s activities at Kelvyn Park have been blown up and turned into posters to decorate the walls, along with mementos from the strike.

Members also have an email list, coordinated by the stewards (called delegates), where all members receive and can respond to organizing updates.

MORE PROBLEM-SOLVERS

In recent years the stewards have maintained a policy of “one and done.” “Once your three-year term as lead delegate is up, you step down,” Skinner said. That brings new people into the steward role.

“Instead of looking for the ‘right person’ to fill the position,” Skinner said, “we find people will rise to the occasion. People will find they have abilities and skills they didn’t know they had.”

That’s partly because they get lots of mentoring. Former stewards continue to contribute, and today teachers are as likely to go to former stewards for help as to current ones.

Leaders at Kelvyn Park do surveys to discover the most pressing issues, and have made potent use of petitions. Facing a hostile principal in 2010, more than 90 percent of tenured teachers signed a petition that went over her head to her boss.

At an ensuing meeting with the boss’s representative, 65 teachers were prepared to describe specific problems, including all the ways the principal was failing students. The two stewards “couldn’t have done it by ourselves,” Skinner said.

“We couldn’t have countered his arguments. We needed the special education teachers there. We needed science teachers there. All the teachers would give their precise individual expertise. When the official tried to argue that the school was adequately funded in one area of instruction, a literacy teacher would say, ‘No, that’s a different budget.’

continued...



...continued

“This was a watershed moment for our school,” Skinner said, “in which the experience and expertise of the entire staff, not just that of a couple of leaders, was demonstrated to the bosses and to each other.”

Eventually Kelvyn Park got a new principal. Before she was hired, her boss discussed the nomination with a teacher leader, to find out whether she worked well with the staff.

WITH PARENTS AND STUDENTS

Union members reinforce their workplace presence by allying with parents and students. Chicago public schools each have a Local School Council (made up of parents, students, community members, teachers, and the principal) that meets monthly to oversee operations.

Active union members ran for and won seats on the LSC. Other members often come to meetings to keep the LSC informed about their views, grievances, surveys, and petitions.

As a result, the LSC has become far bolder in calling for more resources and a safer school. In 2010, 150 students even staged a midday walkout demanding more teachers. The same year, two parents and their children went to a school board meeting to speak against the principal's defunding of extracurricular programs. They got the money back.

By keeping their school well organized and vigilant, in recent years teachers have:

- Gotten back \$300,000 that a principal tried to return to the board.
- Restored full funding of athletics programs.
- Restored teachers' right to make as many photocopies as they need.
- Rehired an experienced dean to deal with discipline.
- Saved the jobs of two P.E. teachers and one art teacher.
- Forced the principal to redo the evaluations of several veteran and activist teachers who were targeted with lower performance ratings.

“The administration will ignore you if it can,” Skinner said, “but if you consistently show you're not scared to stand up to the principal or their boss, you can get somewhere. We've created a culture where that's the norm.”



STEWARD'S *corner*

Bringing the Community To the Bargaining Table

by Nick Faber

In a time when parents, community, and teachers 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.

That's how union teachers in St. Paul feel about our contract: it's the most important legal document—and social justice document—for ensuring a quality education for our students.

So over the past four years we have gradually moved toward public participation in our negotiations.

There was a bit of tension around open bargaining on our team at first.

We have gradually moved toward public participation in our negotiations.

People weren't sure how outsiders would act, and were afraid of saying something "wrong" in front of community members.

But after reflecting over the last 10 years' negotiations, we realized there was nothing we said around the table that we would not want our members and the community to hear. In fact, there were many things said by management that we really *did* want the community to hear!

For example, when we proposed that any principal or teacher being considered for a leadership position needed to have an evaluation of their teaching on file, management said no. We wanted the public to hear that the district thought it had the right to hire people to teach teachers how to teach, or supervise them, even if they hadn't demonstrated that they knew how to teach themselves.

Management used to assert that class size didn't matter, and that if teachers didn't like their conditions, they should



Janet Hostetter

St. Paul teachers at a listening session last year heard from Dora Jones of Mentoring Young Adults. Teachers are including parents and community members in study groups and in bargaining. Community witnesses have even kept management from acting up at the table.

find another job. These types of comments have stopped.

OPENING UP

Our first step to open bargaining was with our own members.

Before, the only members in the room were usually the five or six members of the bargaining team. During 2009 negotiations, we asked about 50 teachers to show up for bargaining as we introduced language around special education. They came wearing their St. Paul Federation of Teachers T-shirts and we prepped them for their role. They introduced themselves, a few spoke, and all listened intently.

Management reps were clearly on their best behavior. They knew they couldn't just make up stories or claim

our reporting was false. The people who knew the truth were in the room.

Bargaining team members spoke with more confidence knowing they were supported by those who felt as passionate about the students and learning conditions as they did. They also felt appreciated.

Often we invited parents to speak. One parent told how she wanted to help in the classroom, but with so many students and desks she was physically unable to get to the students.

In the next round of negotiations, for the 2011-13 agreement, we took further advantage of Minnesota's open meeting law, which says all negotiations with public employers are open to the public.

We were seeing that in other districts, right-wing bloggers and other groups

were showing up at bargaining and writing with a negative slant. SPFT decided to get ahead of the curve and embrace open bargaining.

We trained a Contract Action Team that recruited members to attend negotiations and communicated reports back to the members at their sites. They reached out to visitors, made sure they signed in, and answered their questions. We also trained CAT members in dealing with media.

Occasionally, the union asks for a caucus and management leaves. The union gets input from community observers before proceeding.

We partnered with Neighborhoods Organizing for Change (NOC), a grassroots group in low- and moderate-income neighborhoods, to do a community survey on education issues throughout the Twin Cities, and then issued a report on their findings. Two concerns were too-large classes and lack of communication between school and home. We incorporated these issues into our proposals for bargaining.

CAUCUS EARLY

Our format is simple. Negotiations start at 5:00 p.m. Members and guests come at 4:30 to caucus beforehand. Norms are explained and proposals are reviewed.

The audience does not actively participate in the negotiations but is sometimes invited to speak. Parents have testified about class size and about how important Pre-K was for their children.

Occasionally, we ask for a caucus, and management leaves. We can then get input from the larger group before proceeding.

Management has now started to invite parents and community members, too. This hasn't been successful for them, however. This September, we presented a proposal that would ensure all students had access to a librarian in their schools (St. Paul has 10 librarians for 39,000 students). When our CAT members talked to the invited parents on their way out the door, one said, "I can't believe they are not supplying you with the tools you need to teach our children."

Any tensions the negotiating team had about open bargaining have quickly faded. Instead of fear of those in the room, our team feels supported, energized—and successful.

We've won language to reduce class size and on special ed caseloads, and our Parent/Teacher Home Visit Project (see box). We've also fought off harmful language, such as extending our work day without more pay.

And it's hard for management to assert its "right" not to bargain on some items (such as class size and special ed caseloads), when there are community members in the room. We counter with "these are our schools, everyone in the room," and we should be deciding these things together.

Transparency has also helped us win over our more skeptical members. One member came to watch because he felt his union wasn't representing his interests. He was so taken by the session that he continued to come every week. In the end he confessed his original motives and said he'd learned his union was working not only in his best interests but in those of the children.

STUDY HALL

In this year's negotiations we wanted to bring even more community input. We formed two study groups made up of parents, teachers, and community members recruited from organizations that we have relationships with.

The groups generated answers to three questions: *What are the schools our children deserve? Who are the teachers our children deserve? And what is the profession our teachers deserve?*

The study groups used two books. One read *The Schools Our Children Deserve*, by Alfie Kohn, and the other used *Teaching 2030*, by Barnett Berry and the Teacher Solutions 2030 Team. The books were intentionally from different perspectives, to spark conversation.

The study groups then made recommendations about what we should advocate for in negotiations. We took those recommendations to broader groups of the community, such as NOC, and to our members in a number of listening sessions. The sessions were led by an outside facilitator so that union leaders would not influence the process.

We took the refined recommendations, plus information from our member survey, and gave the information to a researcher. He organized the material into themes and incorporated research on best practices in education.

This material was organized into a report called "The Schools St. Paul Children Deserve," which was the basis for our key bargaining proposals: access to pre-K for all students; access to school nurses, social workers, counselors, and librarians; lowering class size further;

and dropping a standardized test mandated by No Child Left Behind.

Thus far, management has refused to bargain on 18 of our 29 proposals because of "managerial rights." But the community is in the room, and the community people think differently. □

[Nick Faber is an elementary science specialist and secretary of the St. Paul Federation of Teachers. "The Schools St. Paul Children Deserve" can be found at www.spft.org.]

No Place Like Home

Until we came across the Parent/Teacher Home Visit Project, started in Sacramento, California, 15 years ago, we had never seen an idea that was such a win for everyone—students, families, district, teachers, and union. The idea is that teachers can teach students better when we know them better and have a functional partnership with their parents.

Started by parents, teachers, and community members, the project in Sacramento (and other locations they helped to start in 16 states) saw increases in achievement and attendance and decreases in suspensions in buildings where a majority of teachers were doing home visits.

Despite the fact that this was a win for all, our district refused to consider the idea when members proposed it. Luckily, our union leadership saw the value and sponsored pilot training, and our bargaining team brought the idea—and funding for it—to the table.

Participation by teachers and families is voluntary and teachers are compensated for visits outside their workday. The visits are meant to build a relationship—no talking at the parent—and no paperwork is brought.

Today the project is fully run by the union and has grown considerably—from only six teachers doing about 15 visits three years ago, to more than 350 teachers trained today and more than 200 home visits conducted last year.

Teachers visit the homes of their students with another teacher from their building. The discussion is around hopes and dreams that both the parent and the teacher have for the child, expectations that parent and teacher have for each other, what the student does outside of school, and the parent's own experience with school.

Sacramento's project is becoming a national nonprofit and SPFT is a regional training site for it. This summer our union was contacted by two other districts to train their teachers in our model and we have also put on a series of other trainings for teachers on building parent/teacher partnerships. We have had major articles in both local papers, and this fall will be featured on the Education Nation segment of the "Today Show."

STEWARD'S *corner*

How to Open Up Bargaining

by Merrie Najimy

In my local, the Concord Teachers Association, member participation is at its peak—thanks to our experience with Open Bargaining. It's helping us bring our union back to life, change the balance of power, and build hope for our future.

When I say Open Bargaining, I don't just mean inviting members and the public into negotiating sessions, although that's part of it. I'm talking about a transparent approach to the contract campaign, so the union's legitimacy comes from members participating every step of the way.

Here's how we did it:

1. Find out what matters to every member.

We started our contract campaign five months before the contract expired, with an electronic survey and conversations, both one-on-one and in small groups.

We talked about joy in our work—something we learned from the teachers union in Portland, Oregon. We spend so much time talking about what's wrong. It's hard for people to do that constantly.

Rather than a problem, we wanted to start with a vision. We asked members three questions:

- What brings you joy in the work you do with students?
- What sucks the life and joy out of working with students?
- What can we propose through bargaining that could increase the joy and reduce the stress in your work?

These conversations were transformational. They brought us back to why we got into teaching. Members also began to see the union in a different light—as the only group that was talking about a



Concord Teachers Association

The Concord Teachers Association is using Open Bargaining to engage and mobilize members.

How We Got Here

In 2010, our superintendent was committed to busting the bus drivers' union (also part of the Massachusetts Teachers Association) with a privatization scheme.

Meanwhile, at the elementary school where I teach, a new principal began bullying veteran staff. She let go a popular teacher instead of granting her tenure, and broke up a team of experienced teachers.

She also began targeting me—the union president—for dismissal, giving me "unsatisfactory" evaluation ratings. This sent a chill through the union.

Overnight I had gone from a satisfactory teacher to an unsatisfactory one. It seemed clear to us that it was because of my union activity. If she had gotten away with firing me, no one would have stepped up to replace me as president. It would have taken years for the union to recover.

So we built a movement. We began by holding conversations and trainings with bus drivers, teachers, parents, and community members. Parents were concerned at how the attacks were hurting teacher morale.

Members got more involved in the union than ever before—attending rallies, writing letters to the editor, packing meetings of the School Committee (our school board), and organizing house parties and coffee hours with parents. After three years of struggle, we stopped the bus privatization, the principal left, and we ended the retaliation.

Through this experience, many of us lost our fear. Members got used to taking action and being in constant communication with union leaders. Also, three parents who had grown concerned about what was going on were elected to the School Committee. (Though they have yet to really exert their power, there's now much more open debate, instead of just rubberstamping the chair's proposals.)

Then last February, the Massachusetts Teachers Association held a summit to help locals learn open bargaining. Our bargaining committee was inspired. The week after the summit, we hit the ground running.

vision for kids. People got excited to be part of the contract campaign.

2. Develop and ratify a platform for the schools we all deserve.

In our survey and conversations, teachers told us they wanted more time for reflection and collaboration, more control over curriculum and assessment, more power over how federal mandates are applied locally, and to be recognized as the experts they are.

Using all this information, our bargaining team developed a platform with three parts: *Time for Teaching and Learning*, *Professional Dignity*, and *Equity*. Members ratified it unanimously.

From this we developed contract proposals. For instance, under *Time for Teaching and Learning*, we're proposing a task force to study and reduce the time spent on testing.

3. Use a communication loop to keep members informed and get feedback.

To prepare for bargaining, we built a communication tree in each building, where one member was responsible for staying in touch with a few others in her grade, house (a team of teachers within a grade), or section of the building.

Every time something important happened, we took it back to the members. Every time we had a bargaining session, we held union meetings in each building within a week and sent out email updates.

Most important, we continued our one-on-one conversations. The morning after a bargaining session, members who had attended would start talking with co-workers about the experience.

4. Bargain beyond mandatory subjects.

We have emphasized proposals on "permissible" subjects of bargaining, like control over curriculum and input on the amount of testing. These are subjects that management isn't legally required to negotiate over—but they're as important to teachers as mandatory subjects like wages and schedules are.

Fighting hard on these subjects has been crucial for getting members involved in our contract campaign, and for earning community support. When we talked about teachers as the experts who should make curriculum decisions, parents understood and backed us up.

5. Open up negotiation sessions.

We needed the employer to agree to open up bargaining to all members. So we spent the first two sessions debating ground rules.

The lawyer for the School Committee (Concord's equivalent of a school board) first tried the diplomatic tack, arguing that the way we've negotiated in the past—with a small bargaining committee, and no community members allowed in the room—works well.

When that didn't persuade us, he used scare tactics, saying they would have to invite members of the Select Board (the town's governing body) and the Finance Committee (which proposes budget guidelines for the School Committee).

Being a witness at the table is completely different than just getting a report afterwards.

With these elected officials in the room, he claimed, the School Committee couldn't be as generous with its financial package. We didn't succumb to this either.

We finally won the issue by bringing pressure. For the third session, despite not having the ground rule yet, we went ahead and packed the room with 50 teachers. That showed a new level of seriousness on our side, and proved that our committee had members' backing. By the end of the day, the School Committee had agreed to open negotiation sessions.

Being a witness at the table is completely different than just getting a report afterwards. Members who witness the process themselves feel more informed—and they get fired up at the disrespect the School Committee shows for teachers. People are upset when they have to miss a session.

6. Hear multiple negotiator voices at the table.

We've abandoned the practice of having a lead negotiator speak on our behalf. Instead we have two co-chairs who open each meeting. Then each member of our seven-person negotiating committee speaks to a part of the platform and its related proposal.

It's harder for the superintendent and School Committee to dismiss seven of

Building Community Ties

We haven't yet settled our contract, which expired on July 1.

We're no further along in reaching agreement on what we see as the big issues: academic freedom, input over curriculum and scheduling, and a task force on assessment.

On the other hand, because of what we've raised in bargaining, we've actually seen changes in management's behavior in the day-to-day stuff. We're seeing more positive resolutions of our grievances, and management has backed off an effort to unilaterally impose changes to the evaluation system.

We've also been included on technology and scheduling committees to brainstorm changes—though we don't intend to let those substitute for contract language.

And we're seeing greater participation in the union than ever before. Now we're focused on building our external power, by cementing our community ties. Teachers are turning up the heat by:

- jam-packing negotiation sessions, along with parents and community allies
- wearing union T-shirts, buttons that track the number of days without a contract, and stickers with the date of the next bargaining session
- holding 10-minute standouts outside our schools, where we give parents flyers describing our platform
- flyering around the town of Concord
- distributing car signs that say "*Concord Children Deserve...*" (Members and other supporters can fill in the blank, then tape up the signs in their car windows.)
- holding community events, such as an upcoming forum, and one-on-one conversations to explain our platform to parents and community members.

us, speaking with one voice, than one individual leader.

7. Never have conversations with management away from the table.

Open bargaining means moving away from the habit of relying on individual relationships, and toward relying on collective power.

At one point, the School Committee invited us to talk with them—away from the negotiating table. This led to a difficult internal conversation. Some members of our bargaining committee felt it would be helpful; others felt it would violate our commitment to transparency.

But we're a strong team, with deep respect for each other. Ultimately we decided to stick to our commitment, and our team came away stronger for it. □

[Merrie Najimy is the president of the Concord Teachers Association.]

LABOR NOTES PAGE 13 FEBRUARY 2016



Concord Teachers Association

and Oregon have imposed similar bans.

But Seattle special education teacher Shelly Hurley believes her district “put the cart before the horse” by curbing suspensions without adding other support for teachers.

The policy change “looks great” on paper, she said. “Suspensions are going down—but that doesn’t mean learning is going up.”

Seattle teachers, meanwhile, are working to build long-term alliances with parents and community groups. In last year’s negotiations, the union brought up the problem of racially biased suspensions.

Training is a big part of bringing restorative practices into classrooms.

At first, Hurley said, “we wanted hours and hours of professional development.” But eventually, “we came to realize we wanted it to be something more organic that grew at every school.”

Seattle teachers don’t see this issue as isolated. They also fought for guaranteed recess, less testing, and much-needed raises. In September, they went on strike.

Their final contract settlement created racial equity teams at 30 schools to examine how discipline affects kids of color. There’s also a citywide behavioral support team of five staff. After a schoolyear with the changes, a union-management committee will make recommendations to the school board.

IT TAKES MONEY

Where the rubber hits the road is whether a rule-change is backed up with the necessary resources. “It’s going to cost money,” Hurley said. “There’s no way around it.”

San Francisco teachers saw this firsthand. They were on board from the start with their district’s “Safe and Supportive Schools” initiative, which called for scaling back suspensions, introducing restorative practices, and hiring coaches to train teachers.

But two years after implementation, the district has dismantled the team of coaches and is scaling back the resources to run the programs.

“You can’t just say it in name only,” said Lita Blanc, president of United Educators of San Francisco.

To fully realize the initiative, the union has responded with its own set of demands: a teacher’s aide in every class, and in every school, a parent

engagement plan and an alternative learning center, staffed with a school employee—so students who’ve been removed from class aren’t just warehoused in an office.

Five hundred teachers rallied at the school board in May for “Safe, Stable, and Supportive Schools,” sending the message that it takes long-term resources to transform school climate. They want language addressing these demands in their next contract.

Teachers in St. Paul, Chicago, and elsewhere are also linking these work-site issues to bigger social and political demands, like supporting the Fight for \$15 and stopping banks from foreclosing on families. After all, students bring those problems to school, too.

Training is a big part of bringing restorative practices into classrooms. But St. Paul Federation of Teachers Vice President Nick Faber said unions must not lose sight of the need for ongoing staffing too. “Teachers are so on overload of initiatives, they can’t keep them straight,” he said.

In recent bargaining, St. Paul teachers won expanded school-climate improvement teams, which include parents. Each school’s team can apply for a \$150,000 grant for restorative practices, using the money for additional staff or training as the local committee sees fit. Six schools are now in the process of creating their own plans.

“The key is to have this work pilot in schools,” said Faber, “and pilot in schools that are ready, not just be dumped on a school.” □

Pushed Out of School

The stats are alarming. More than 3 million students are suspended each year, says the Department of Education. Black students are three times as likely to be suspended as the general school population.

African American children are fewer than 20 percent of pre-K students, but receive half of all pre-K suspensions. Among male students of color with disabilities, nearly 1 in 4 receives an out-of-school suspension.

The consequences for suspended students can range from falling behind in schoolwork to far worse. A study of Texas students by the Council of State Governments found that students who got suspended were more likely to be held back, drop out of school, and get caught up in the juvenile justice system.

But if you’re going to ban suspensions, teachers say, you have to offer an alternative path. Classroom management has only gotten harder as class sizes grow and the ranks of school counselors and nurses shrink.

To deal with a disruptive student, teachers often have to stop class. Removing a student is sometimes the only obvious way to resolve the issue and get everyone else back on task. The emphasis on test prep and high-stakes benchmarks only increases the pressure.

Teachers don’t have the final say on suspensions—administrators decide what to do with students who’ve been removed from class. But teachers do have authority in the chain of actions that ends up pushing students out of school.

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L.A. Unified School District Budget, 2015-16



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Source: Los Angeles Unified School District, “Adopted 2015-2016 Superintendent’s Final Budget.”

Teachers Take On Student Discipline

by Samantha Winslow

Two kindergarteners are poking each other with their pencils. What starts as a game soon gets out of hand. With one child bleeding, the teacher brings them to the principal's office. Later, she finds out both kids were suspended and sent home.

It's not an uncommon scenario in today's public schools. But as activists draw attention to high rates of suspensions, racial disparities, and the "school-to-prison pipeline," the political winds are shifting. Policymakers at the federal and district levels have begun to demand fewer suspensions, especially for minor rule-breaking.

Teachers are drawing attention to racial disparities in suspensions and the 'school-to-prison pipeline.'

It's an issue where not all teachers see eye to eye. But a growing number of teachers and unions are rising to the challenge, pushing their school districts to back up suspension bans with the resources to make alternatives really work.

A BETTER WAY

Elana Eisen-Markowitz, a 10-year teacher New York City, is active in a campaign to introduce "restorative practices," an alternative approach to solving student behavior problems.

The idea is that teachers and students meet to discuss the behavior and the root problems that might cause students to act out—such as stress, anxiety, or problems at home.

For instance, suppose a student yells and curses at a teacher in the hallway. Instead of removing the student from his next class or sending him home, the teacher would sit down with him. Both would explain their experiences of the incident. Often a parent or even a peer student joins the meeting, too.

This new approach requires a culture change. But in her experience, Eisen-Markowitz says, it's more effective than punitive discipline.



San Francisco teachers rallied at their school board for Safe, Stable, and Supportive Schools.

"So rarely I've seen a suspension work, where a student returns feeling ready to learn," she said. "I personally feel safer knowing I've had a face-to-face conversation, rather than [just] seeing them in the hall again and again."

Eisen-Markowitz is pleased that New York has moved to limit suspensions for behavior issues and explore restorative practices—though she's already questioning the city's rollout. She stresses that teachers must have a say in planning and implementing a restorative practices program. It can't be outsourced or dropped from headquarters.

Besides being a building rep (shop steward) for her union, Eisen-Markowitz organizes with the activist group Teachers Unite, a network of educators who are using and promoting restorative practices. Teachers Unite discourages outsourcing the topic to specialist trainers, who won't be able to build relationships or stick around long-term.

New York's United Federation of Teachers—the largest teacher local in the U.S., with 100,000 members—hasn't been so welcoming. "The UFT has centered

the conversation on teachers' need to kick students out," Eisen-Markowitz said.

Another teacher group, the Movement of Rank-and-File Educators—modeled after the caucus that leads the Chicago Teachers Union—is running for top office in the local, with a platform that includes reforming student discipline and taking on racial justice issues.

'CART BEFORE THE HORSE'

African American students, though only 15 percent of the elementary school population in Seattle, were receiving nearly half the suspensions.

After that jarring statistic drew public attention, last September Seattle's school board approved a one-year city-wide moratorium on elementary school suspensions for disruptive behavior.

It's a common starting place for district and state policymakers—lessening or halting "willful defiance" suspensions, for example, while leaving administrators and teachers the discretion to act on more extreme behavior. Minneapolis, New York City, Los Angeles,

United Educators of San Francisco

and Oregon have imposed similar bans.

But Seattle special education teacher Shelly Hurley believes her district “put the cart before the horse” by curbing suspensions without adding other support for teachers.

The policy change “looks great” on paper, she said. “Suspensions are going down—but that doesn’t mean learning is going up.”

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#468 March 2018

Teachers Ignore Anti-Strike Law



Cassie Allara



AFT-West Virginia

West Virginia Teachers, School Employees Walk Out Statewide

by Jonah Furman and Dan DiMaggio

Teachers and school service employees in West Virginia are on the verge of a two-day statewide walkout February 22-23 as we go to press, riding a wave of indignation that has washed over the state.

They're protesting health insurance changes that would result in pay cuts for many state employees. Governor Jim Justice's initial proposal would have provided raises of just 1 percent a year for the next five years—while health insurance costs would rise significantly.

School employees held walkout votes county by county.

Pay for West Virginia's teachers rank 48th in the country, and the state is constantly losing teachers to its neighbors, where they can earn much higher salaries.

The first rumblings began late last year, when a group of teachers formed

a secret Facebook page and started planning a "lobby day" at the state capital on Martin Luther King Day, when they knew the legislature would be in session. Word spread, and soon the West Virginia Education Association, the state's NEA affiliate, was planning an official rally.

"This was almost completely a grassroots movement," said Erica Newsome, an English teacher in Logan County. "The unions kind of followed us."

Organizers estimate 150 people showed up. "The rally was kind of small," said Ashlea Bassham, a teacher at Chapmanville Regional High School, "but then it just sort of happened."

PACKED STATEHOUSE

Teachers and school service employees started holding walkout votes county by county. West Virginia has two statewide teachers unions, affiliates of the AFT and NEA, which often compete for membership. There is also the West Virginia School Service Professional Association, or WVSSPA,

which represents bus drivers, cafeteria workers, custodians, and clerical workers. But teachers and school service employees decided that in this case, any school employee could vote—whether they were a member of any one of the unions or no union at all.

At Bassham's school, the walkout vote was conducted by paper ballot, all in one day, and the response was resounding: 49 yes, 9 no. So on February 2, Chapmanville Regional High walked out—along with the rest of Logan, Mingo, and Wyoming Counties. Other counties organized "walk-ins" before school.

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Stopping harassment from co-workers.

West Virginia Teachers

Continued from front page

Strikers converged on the capital again. This time there were 1,000 teachers, public employees, students, and parents at the statehouse. Wyoming County teachers had so much support that they rented county school buses to make the 90-mile trip.

"The gallery filled up too quick for me and some co-workers to go in," said Bassham, "So we waited in the breeze-way to talk to our state legislators. Some of our representatives were willing to talk and take a minute and listen, and some of them had their heads down, walking really quickly."

The legislature responded by announcing a temporary freeze to Public Employees Insurance Agency (PEIA) premium increases, and offered a two percent pay raise in the first year. But that wasn't nearly enough to satisfy West Virginia teachers, who want a more permanent fix to the PEIA and the state's low salaries.

OUTRAGEOUS CUTS

"When I first started teaching, I understood that our salaries weren't going to be great, but that it was good benefits," said third-grade teacher Wendy Peters, the president of her union local in Raleigh County. "Our insurance was kind of like the gold standard for health insurance."

But for years the PEIA has been struggling and underfunded. Late last year, the governor and the PEIA board proposed several changes that would undermine health benefits, which increased public employees.

Teachers and school employees would see instant increases in their prescription costs and in premiums—which would be recalculated based on their total family income, instead of a flat rate based on a single employee's salary.

An initial proposal would also have hit retirees with a two-point premium increase, but after an outcry this was walked back. Still, the chronically underfunded PEIA is forecasting even harsher changes in the near future.

One particularly contentious proposal, which has since been withdrawn, was a wellness-incentive program called "Go365." Teachers and other public employees would have to earn "points" by, for example, sending the state photographic evidence of their healthy behavior and tracking their steps.

If they failed to meet certain benchmarks, their monthly premiums would increase by \$25 a month. Those who

opted out would have \$500 added to their deductibles.

IN SEARCH OF JUSTICE

By February the secret Facebook group, West Virginia Public Employees United, had over 20,000 members. Inspired by the first three counties, more local unions began holding their own walkout votes, alongside a surge of grassroots actions.

Governor Justice, who got the WVEA's endorsement when he ran as a Democrat in 2016—but has since switched back to the GOP—has drawn particular ire.

"You feel like, 'Gosh, we helped you get elected, and you were talking about how education needed to be the centerpiece of our state, and you've since switched platforms,'" said Peters. "You feel betrayed."

While in office the governor has continued to coach a girls' high school basketball team; the games now draw regular protests from teachers.

MOMENTUM BUILDS

In the first week of February, AFT-WV and WVEA leaders asked the locals for each of the state's 55 counties to ballot employees on whether to authorize a statewide walkout before the March 10 end of the legislative session.

An overwhelming majority of counties voted in favor.

While state union leaders discussed whether to call a statewide action, the rolling walkouts continued. Mason and Cabell Counties voted to go out Friday, February 16. The next day, three more counties signed on, and a sixth had joined in by the time teachers and school employees arrived at the capital Friday morning.

February 17, a Saturday, saw the biggest action yet. An estimated 10,000 teachers, service employees, and allies gathered outside the statehouse. Leaders from the United Mine Workers and the Teamsters spoke.

When the leaders of the two statewide teacher unions took the microphone to declare that negotiations were "getting nowhere" and announce a shutdown of "the entire state," the crowd erupted.

The walkout was on.

PROUD 'REDNECKS'

West Virginia has a long history of militant union fights, especially in the coal mining regions in the south of the state—including the three counties where this year's walkouts kicked off. Many teachers at the statehouse have been wearing red bandanas, a tradition

that originated in coal miners' union battles of the 1920s, one place where the term "redneck" originated.

"Unions are what we're raised on," said Bassham. "The Battle of Blair Mountain [a 1921 confrontation between 10,000 armed coal miners and 3,000 lawmen and strikebreakers, and eventually the U.S. Army] was 15 minutes from my house."

Parents have held informational pickets before and after school, and even some school boards and superintendents have issued statements of support.

When Logan County walked out, at first the district sent out text messages and robocalls to parents and teachers, stating that school would be closed "due to an illegal, unauthorized employee walkout/work stoppage."

Any school employee could vote on walking out, whether they were a union member or not.

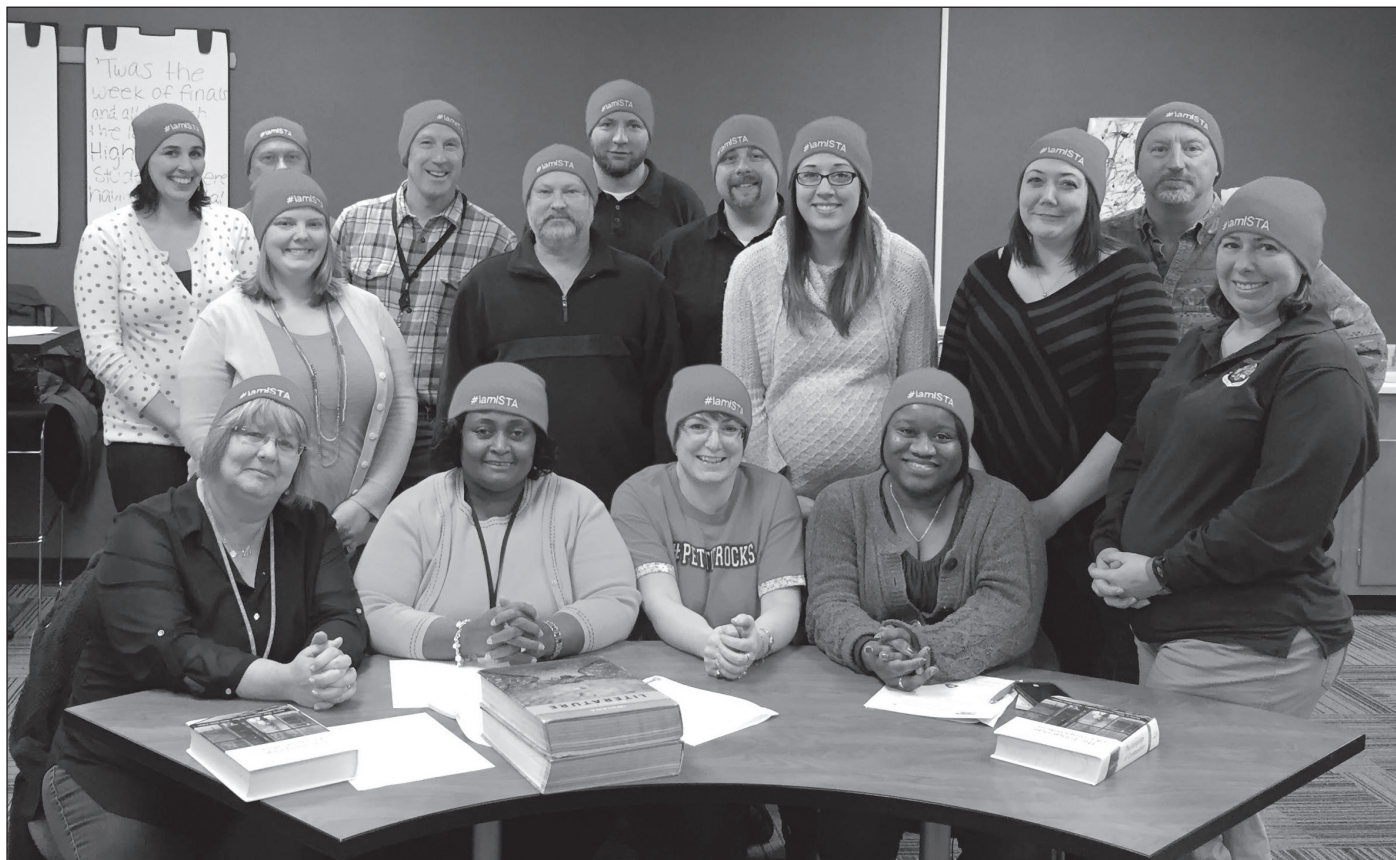
But a week later the board came around and passed a resolution declaring that it "supports our employees in their efforts to receive higher wages and medical benefits commensurate with their commitment to our children."

To maintain public support, teachers and school employees have organized food drives ahead of the two-day walkout, to make sure students who rely on the school for lunch won't go hungry.

Striking is illegal for public sector employees in West Virginia, but there doesn't appear to be much fear on the ground, thanks in part to the 700 teaching vacancies in the state.

"There's a sense of, 'What are they going to do, fire us all?'" said Jay O'Neal, treasurer for the Kanawha County local. "Who would they get to replace us?" □





Indiana Teachers 'Go Green' To Track Member Sign-Up

by Samantha Winslow

What will happen to public sector unions after the Supreme Court rules on the Janus v. AFSCME case this spring? Indiana teachers are already there. Slammed by a "right to work" law in

In the third year statewide membership grew.

1996 and a new barrage of attacks in 2011, the teachers experienced what many unions are afraid of—a big drop in membership.

But the Indiana State Teachers Association didn't roll over and give up after that. The union developed a tracking system called "Go Green" to help local leaders get membership back up.

It's working. The first year of the program, the union narrowed its deficit between existing members lost to retirement and new members gained. The second year, it broke even. The third year, statewide membership increased.

This is in a legal environment that's worse than right to work. Budget cuts in 2011 were paired with sweeping restrictions that kneecapped unions. Teachers bargain over only wages and benefits, and only between September and November of each year. Past that, impasse is declared and a third-party factfinder decides the final agreement.

Even under these circumstances, membership rates matter. "You will have a superintendent tell you, 'You don't even represent 50 percent of the teachers, why should I care what you are asking for?'" said ISTA representative Heidi Miller.

Case in point: the union local in Mazonaquah was able to fight off a benefits cut after increasing its membership from 58 to 70 percent in two years.

MANY HANDS, LIGHT WORK

So how does it work? The heart of the "Go Green" program is getting teachers in every school involved in signing up members.

Schools below 50 percent union

membership are flagged as red. Schools at 50 percent or higher are coded yellow, and those at 70 percent or higher are green. The color scheme helps officers and association reps (stewards) prioritize which schools, and even which parts of buildings, need the most help.

Miller coaches local leaders on the system. "We've encouraged them not to put the burden on the elected leaders, not just the association reps or officers, but to spread it throughout the membership," she said.

Organizing in Open-Shop America



Eastern Howard Education Association, which represents a small cluster of schools north of Indianapolis, was at 56 percent membership when it launched the program. "That was a little scary," said President Shawn Carpenter.



So a handful of officers and reps formed a membership committee and divided up the list of nonmembers. Each person took a first assignment—two or three people to talk to—based on years of experience, department, and who they knew best.

They've kept following up and working their lists ever since. A year in, Eastern Howard's membership is up to 70 percent.

Carpenter said this success comes from tapping into existing relationships—who's friends with who. One-on-one conversations are key, she said: "Asking in person, it's harder to say no."

The committee doesn't leave people with assignments for long. Members text each other, "How'd it go?" When someone declines to sign, they talk it over: "What was holding this person back? Is it something we can fix?" The committee builds in a second and third attempt, often sending back another member with a different relationship or approach.

Through member sign-up conversations, the Eastern Howard union discovered a unifying issue: a point system required teachers to meet a bunch of unrealistic criteria based on attendance and degrees in order to get a raise. In last year's bargaining, the union won a pay scale instead.

EARLY AND OFTEN

To create an environment where people want to join, you have to stay in constant communication, said Brad Bennett, president of the local in the Western School District.

The goal is to draw in potential members by "making them feel like they are missing out in not being in our association," Bennett said. For instance, members get updates about bargaining and about meetings with the principal to address problems.

When the Western district wanted to extend the school day without added compensation, the union packed 80 members (out of 180 district teachers) into a school board meeting and won a pay raise.

New teachers are particularly important to reach, to frame the importance of joining the union from day one. Ideally the first ask comes from someone on the membership committee who is

"What was holding this person back? Is it something we can fix?"

also relatively new, "so they see other people like themselves as members," said Miller. "Are they getting ready to buy their first house or have their first child, versus a teacher who is close to retirement?"

Living Without Dues Deduction

A popular line of anti-union attack by state legislators is to ban employers from deducting dues from members' paychecks. Dues deduction is banned for Michigan teachers, for instance, and for the whole public sector in Wisconsin.

Indiana has no such law at this point—but the teachers union opted to stop payroll deduction anyway. When new members sign up, they give the union their bank or credit card information to process dues directly.

This preempts a fight with hostile legislators and keeps the union's focus on talking to teachers. It also takes control of union funds out of the hands of employers.

Carpenter says her union also tries to match up each new teacher with someone from the same department who can act as a lasting bridge to the union and perhaps offer ongoing mentorship.

In larger districts, teachers set up a separate membership committee for each school. Each year there's a big beginning-of-the-school-year membership push, because the state calculates local membership percentages on September 15. Under a law passed in 2017, members in any district below 50 percent get a mailing describing how to initiate the process to decertify their union.

But the focus on building membership continues year-round. "We don't let it die after the beginning of the year," said Sue Ellen Sopher, local president for the Maconaquah district. □

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6

Community Partners

One of the most remarkable things about CTU's 2012 strike is that these educators won community support in a national political climate that was not simply anti-union but anti-teacher. A poll conducted by We Ask America in the strike's final days found that a majority of Chicagoans—including 63 percent of African Americans, 65 percent of Latinos, and 66 percent of parents of school-age children—were supporting it.

Community support, however, went far beyond mere favorable opinions. Neighborhood organizations throughout the city played a critical role in both drumming up support for the strike and coordinating on-the-ground support. Action Now, the Kenwood Oakland Community Organization (KOCO), the Albany Park Neighborhood Council, and the Logan Square Neighborhood Association pulled members together to canvass their neighbors in the lead-up to the strike. They held town-hall forums, organized day camps for out-of-school children, turned out members en masse to downtown rallies, and organized pro-CTU press



Different Types of Alliances

(Excerpted from CTU training materials)

Weakest—“Please come support us!” Some people will come help, because they like us or because it is “the right thing to do.”

Medium—“You help us on *this* and we’ll help you on *that*!” Scratch each other’s backs: It does help for your ally to know that you will return the favor. It’s stronger than a one-way relationship, but people will only go so far just to help you with your issues.

Strongest—“We’re in it together!” Solidarity: We are both being harmed. Working together and supporting each other is the only way to fix it. “Supporting you helps me win, too.” ✪

conferences and rallies of their own (see details in Chapter 9).

Why did community groups feel so compelled to support the strike? It was simple, said Jitu Brown, a KOCO organizer: “Parents knew their schools were being sabotaged, and they knew that teachers were standing up against that, so they stood with them.”

In addition, said Raul Botello of the Albany Park Neighborhood Council, which functions on the Northwest Side, it was important that CTU was willing to call out the school board’s racism. “They were talking and speaking the language of parents and youth,” he said. “The people felt their fight.”

Parents didn’t just see the strike as a way to support their children’s teachers. They were fighting side by side on issues both groups were passionate about: smaller classes, more resources for schools, over-testing, and racial equity.

The relationships started long before teachers walked out—even long before CORE members were elected. Chapter 3 told how CORE members worked alongside community groups like KOCO as far back as 2004, long before they had institutional power. “Working with the community was natural to us because we had already been working with the community,” said Michael Brunson, now CTU’s recording secretary.

More than just shoulder-to-shoulder activism, the union’s ability to build enduring relationships came from its willingness to tackle the tough issues of race and class discrimination head-on

and to listen to community members, not just work to get them on the union's message.

Katelyn Johnson, director of Action Now, a community organization active on the South and West Sides of the city, said her group had tried to work with the old CTU leadership “and found they weren’t interested. If there was something they needed they would reach out, but after that you didn’t hear from them.” Botello said when the CORE members were elected, “it was like talking to organizers. The previous administration, they were politicians.”

CTU Staff Coordinator Jackson Potter says the goal now is “a real relationship,” one in which both union and community allies can “make mistakes and take risks to see where we can go and how far we can take it.”

Community Board

Once in office, leaders wanted to formalize their relationships with community groups. They wanted to make sure there was always a channel for community and parent voices to be heard in the union.

So CTU established a new Community Board. At its nucleus were the organizations in the Grassroots Education Movement (GEM), which was born in 2008 to fight school closings (see Chapter 3). The groups were invited to a big rally against layoffs



and school closings, held in the Hyde Park/Kenwood area on the South Side in July 2010—the new leaders’ first reach-out to the community.

Board members also came from the Grassroots Collaborative, a coalition formed by Service Employees (SEIU) locals and community organizations to campaign for a living wage ordinance for big-box stores (eventually vetoed by the mayor).

Mostly the groups on the Community Board had real membership roots in their neighborhoods, although a few were more of the think-tank variety. As in most large cities, plenty of non-profit and neighborhood organizations existed that were content to attempt influence through back channels to politicians; these were not invited. CTU chose groups with organizing traditions and with attitudes toward the power brokers that matched CTU’s new orientation.

“We gave more weight to groups that were more rooted in the community, rather than citywide organizations,” said Organizing Director Norine Gutekanst, who worked closely with the Board. “We wanted people who really wanted to push on the school board, who identified their policies as racist. We chose organizations that believed that, rather than those who thought they could work with the school board.”

According to Gutekanst, September and October 2010 were a “visioning period” for the Community Board, where the organizations discussed their top priorities in education, such as “social and emotional supports for children in the schools” (social workers and counselors), recruiting quality teachers from their own communities, and stopping the closings. “The visioning was a good way to all get on the same page,” she said, “and for us to understand how the partner groups identified the problems with our schools.”

The Board initially consisted of representatives from around 15 groups. (In 2012 it decided to re-adopt the name GEM. Today it includes 30 organizations and meets at least once a month.)

History teacher Jen Johnson pointed out that the Community Board rested on the years of work done by CORE before the slate was elected. “For CORE it was foundational to work with community groups to build a movement,” she said. “We didn’t want to just create a caucus. We wanted to create a movement,

and we wanted people to buy in and to know we would not sell out if we were elected.

“CTU has tried to carry out the same vision. Having those community partners will help hold us accountable to that vision. They can help keep us on track.”

Two Campaigns

After CPS CEO Ron Huberman stepped down in the fall of 2010, the union suggested a campaign for a say in choosing his replacement. Union and Community Board leaders chose a blue-ribbon panel of citizens to identify a schools chief with an education background—unlike Huberman and the two CEOs before him, whose backgrounds were in business.

And in 2012 groups on the Board launched a campaign for an elected, representative school board with seven of 13 spots reserved for parents. Since 1995 the mayor had controlled Chicago’s schools through an appointed CEO and seven-member unelected board. These appointees tended to be wealthy businesspeople, not educators or working class parents. The lineup included Hyatt hotel heiress Penny Pritzker and banking executive David Vitale, ex-CEO of the Chicago Board of Trade. CTU developed a research paper on the value of elected boards.

A group called Communities Organized for Democracy in Education (CODE) was formed. Its tactic was to run nonbinding referendums in 327 precincts on the South and West Sides, to ask the state legislature to change the law that gave Chicago an appointed board. (Each precinct contains a couple thousand residents; there are 2,069 precincts altogether.) “They targeted wards and precincts that had been struck by a history of school closings and destabilization,” Johnson explained.

Organizers presented 10,000 voter signatures in August to get the measure on the 2012 ballot in targeted precincts, and in November, a resounding 87 percent of those voting said yes. The victory was symbolic—actually switching to an elected board would require the state legislature to act—but the show of public support was a milestone.

Not surprisingly, neither of those campaigns directly moved Chicago’s powers-that-be. Looking back, Potter had second thoughts about the union’s push to engage the community in

choosing the next CEO. It was “a good talking point, but that didn’t translate into a campaign that had any chance of winning,” he said. “It was too wonkish of an issue to get broad participation from the public. In hindsight it was a poor use of our time and energy.”

The campaign for an elected board, on the other hand, worked out better—and this one had not been the CTU’s idea, but came at the insistence of KOCO. “We were not sold on this being a good use of union resources, initially,” Potter recalled, “because we were in the middle of a contract campaign.” But KOCO correctly predicted how popular the idea would be, and pointed out that having no control over school governance made everything CTU did an uphill battle. Chicagoans could see that racism and class bias were the reasons city authorities had, as Potter put it, “a free pass to ignore the desires of their constituents.”

The idea of an elected board was, and continues to be, “very easily supported everywhere we go,” Gutekanst said. “It’s a no-brainer: why would you have billionaires sitting on your school board? They don’t have kids in our schools.” Union leaders saw the elected board as a longer-term fight, something they knew they wouldn’t win that year but could support with their contract campaign.

As it turned out, not many CTU members worked on the elected school board campaign personally, because they were



thoroughly involved in that contract campaign. But the two campaigns were complementary. “It helped to set the stage,” said Gutekanst. “We could say, ‘We’re trying to get a better school day, but the school board is an obstacle.’” (See Chapter 7 on the “better school day” campaign.)

Gutekanst believes it’s important that the Community Board “isn’t a vehicle for CTU, it’s a collaboration. Some things we agreed on that were joint campaigns, some not.” Botello said, “We have some really honest and hard conversations. The union might say ‘we can’t weigh in as heavy as you-all.’” Johnson of Action Now says it’s important to CTU’s credibility with community groups that the union is also invested in issues that aren’t directly tied to education, such as getting an ordinance requiring that vacant properties within a certain radius of schools must be boarded up and secured.

In addition to the Community Board, aided by the fact that one of CTU’s in-house organizers is a minister, the union reached out to faith communities in the summer of 2011 to form Parents, Educators And Clergy for Education—PEACE. “Mayor Daley had certain ministers in his corner,” Brunson explained. “Rahm Emanuel the same thing. We had a breakfast and a certain group came just to get information and report back to someone. So we drew back and formed a committee of clergy that we knew were aligned with our vision.”

Local School Councils

Chicago schools differ from those in many other cities in that a voice for parents, community members, and teachers is built into school governance through the elected Local School Councils, which approve school budgets and hire the principal. In practice, the councils vary widely in their effectiveness. Some are rubber-stamps for the principal, some have low participation, and in the many schools on probation because of low test scores, their role is advisory only.

When CTU held its delegate training in March 2011, the invitation list was broadened to include the teacher reps on the LSCs. The union also obtained a citywide list of parent reps and sent them regular emails to keep them abreast of what was happening in the district and invite them to events.

In the strike, the LSCs didn't play a big role. It's easy to see their potential, though, if they were organized and strong. Fast-forward to summer 2013, when Rahm Emanuel announced drastic budget cuts, up to 25 percent for some schools. On the mostly middle-class North Side, some LSCs dared to defy the principal by voting down their diminished budgets. And as spring 2014 LSC elections neared, CTU planned a new emphasis that would encourage teachers to run, give training to those reps, and get active parents to run as well.

"We are really thinking through how we can get our members to deepen those relationships with parents," Gutekanst said.

From the beginning, the community partners shared the ideals that were animating CTU. "I remember an early meeting where they said, 'What is it that CTU is trying to do?'" says Gutekanst. "And I said, 'We're trying to build a movement in Chicago so that people in communities have some say-so in how the schools are run.'"

"Heads nod, and they said, 'Let's build a movement.'"



Read much more about CORE's and CTU's community alliances in Chapters 3, 7, 8, and 9.

Lessons

- ⇒ CTU saw alliances as year-round, not rustled up in an emergency.
- ⇒ CTU was upfront about its view that treatment of Chicago students amounted to institutional racism.
- ⇒ CTU was willing to take leadership from other groups, even if the union's own priorities were distinct.
- ⇒ CTU saw alliances as coalitions of equals that would learn from each other and sometimes agree to disagree or work separately.

- ⇒ CTU chose its allies carefully, declining to waste time on groups that were on a different page in their analysis of Chicago power politics.
- ⇒ CTU plans to use the Local School Councils, existing structures which have ranged from strong to moribund, and breathe new life into them through recruitment and training.

