FUNDAMENTALS OF ORGANIZING
TOOLKIT

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What Is Organizing?

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

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

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

Self-Interest – A Building Block for Organizing

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

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

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

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

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

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

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

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

One-on-One Conversations

One-on-One Conversation Tools

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

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

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

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

Goals of One-on-One Conversation

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

Listening

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

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

Interests: A person's stake in an issue.

Values: The moral principles people live by.

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

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

Active Listening

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

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

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

An Organizing Conversation

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

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

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

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

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

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

Issue Identification

Issue Identification Tools

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

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

The Criteria for Deciding on an Issue

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

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

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

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

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

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

4. **Be worthwhile.**

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

5. **Be winnable.**

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

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

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

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

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

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

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

6. **Be widely and deeply felt.**

   Many people must feel that the issue is real and agree with the solution. No matter the job family, employees must feel strongly enough about the issue to do something about it.

7. **Be easy to understand.**

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

8. **Identify the decision-maker.**

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

9. **Have a timeline that works for your group.**

   Your group should establish a timeline that defines the approximate dates for the beginning,

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

10. **Do not be divisive.**

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

11. **Build leadership.**

   The plan should have many roles and tasks inviting the involvement of a multitude of individuals no matter their job classification. Consider the skills people will develop and the contacts the group will make for future work together.

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

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

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

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

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

Let's Begin Organizing... The Critical Conversation

1. **Discover the issues**

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

   > How's your day going?

   > How did you get this job?

   > What do you like about working here?

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

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

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

2. **Agitate**

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

   > Wow. How long has that been going on?

   > How does that make you feel?

   > Is that okay with you?

   > How are you coping?

   > How is that affecting your family?

3. Lay the blame

Get them talking about who's responsible.

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

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

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

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

4. Make a plan to win

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

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

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

> What's his supervisor going to say?

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

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

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

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

5. Get a commitment

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

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

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

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

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

6. Inoculate and re-commit

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

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

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

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

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

> Does any of that change your mind?

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

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

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

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

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

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

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

Assessment of One-on-One Conversations

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

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

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

Assessment Dos and Don'ts

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

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

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

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

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

DO use active listening skills.

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

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

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

DO treat the assessment conversation like any other organizing conversation.

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

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

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

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

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

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

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

Mapping the Workplace

Mapping Tools

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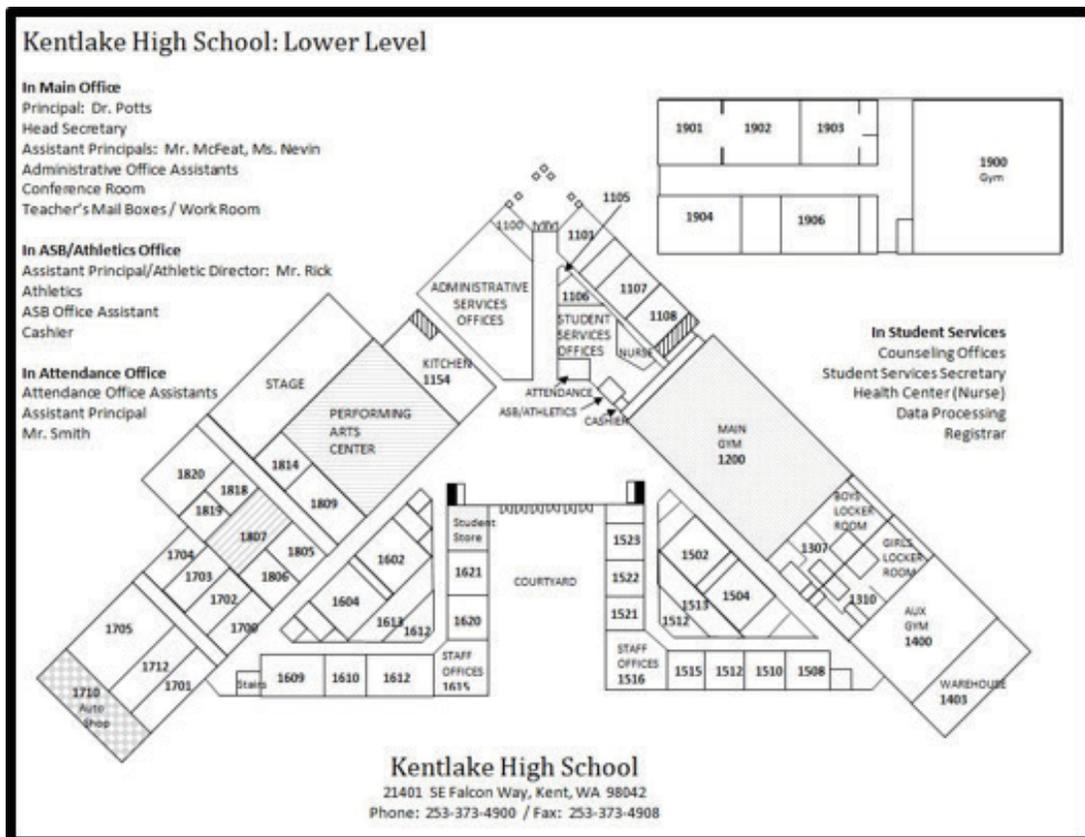- Map How People Connect
- Analyze Your Workplace Map

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

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

- Map out where members/potential members are, supervisors/administrators, and every teacher, ESP member, etc.

- Find the worksite's "Hot Spots" and "Dead Zones."
- Find where conversations and action happens— where do people congregate throughout the work day?
- Check your map against your worksite rosters.

Kentlake High School: Lower Level

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

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

In Attendance Office
Attendance Office Assistants
Assistant Principal
Mr. Smith

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

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

Map out how people connect

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

> Who goes to the same place of worship?

> Who socializes together?

> Who works together?

> Who are all the smokers?

> Who carpools together?

> Who are the Spanish- speakers?

As you identify groups, discuss them.

> How does this group relate to the administration?

> What are the biggest problems affecting this group?

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

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

> Who's the main leader in this group?

> Who do you go to with problems?

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

> Who gathered signatures on the latest petition?

> Who's helping to map the workplace?

Also mark the wider circle of Union supporters.

> Who signed the last petition?

> Who is a member/ potential member?

Leader Identification

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

Leaders are people who:

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

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

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

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

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

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

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

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

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

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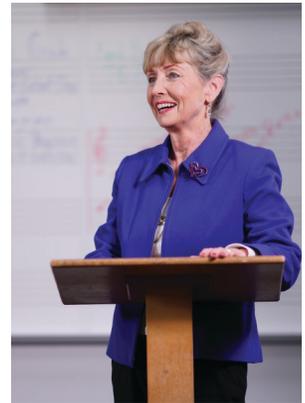
- **Want to build collective power.** Leaders know that building collective power is the way to create long-term solutions to building level, district level, and community social problems.
- **Have a sense of humor.** Leaders understand that humor sustains communities and individuals, and prevents bitterness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

A leader is not necessarily:

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

Building the Organizing Committee

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

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

Organizing for Bargaining or Organizing for an Issue Campaign Tools

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

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

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

Campaign Budgeting

It's All About the Money!

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

BARGAINING/CONTRACT NEGOTIATION: INTERNAL METHODS

STEP 1. Identify the Objective

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

STEP 2. Gather Information

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

   - One-on-one conversations
   - NEA surveys
   - Pencil and paper
   - Online survey templates (such as surveymonkey.com)
   - Listening tour

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

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

3. **Make comparisons.**
   - Emerging issues
   - Past issues
   - Districts/Locals of comparable size and financial situation

STEP 3. Develop an Action Plan

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

1. **Select a bargaining/negotiating team.**
   - Team size
   - Diversity
   - Constitutional provisions
   - Appointed vs. elected
   - Criteria for team members
   - Responsibility
   - Authority

2. **The team should agree on the philosophy about bargaining/contract negotiating.**
   - Interest based vs. traditional
   - Collaborative vs. confrontational
   - Single spokesperson vs. group discussion
   - Historical impact
   - The will of the members

3. **Set bargaining goals.**
   - Establish the difference between goals and priorities
   - Short-term objectives
   - Long-term objectives
   - What are the employer goals?

4. **Plan for member involvement in the campaign.**
   - Consider the impact of bargaining on membership recruitment and retention especially given the many ESP job categories
   - Analyze past member involvement: Who? How?

5. **Create an issue theme.**
   - Concepts like "safety in the workplace" mobilize workers more than a "2% wage increase"

6. **Organize support teams—communications, crisis, research, website, newsletter, issues, etc.**
   - Identify respected workers and volunteers at each worksite to organize/participate in support team activities
   - Using one-on-one conversations, the teams survey the membership to identify issues and develop contract proposals
   - The support teams ensure that workers know they "own" the issues campaign

7. **Plan communication strategies.**
   - Internal or external
   - Written vs. meetings or face-to-face
   - Frequency of meetings/messages
   - Detailed or general message
   - Digital or print
   - Social media
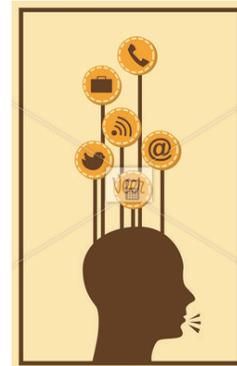
BARGAINING/CONTRACT NEGOTIATION:

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

BARGAINING/CONTRACT NEGOTIATION:

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

Campaign Planning

Campaign Planning Tools

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

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

- Start with an issue that resonates with members and the individuals and communities we are trying to reach.

- Follow a written plan that clearly states the immediate objective, its rationale, and relationship to achieving a larger long-term goal; how it will be accomplished and the leverage that will be used; a timeline with milestones and benchmarks; what members will be asked to do; and a work plan that specifies who will do what and when.

- Are conducted through a cohesive worksite structure characterized by a ratio approaching 1 trained worksite activist for every 10 unit members.

- Involve members by asking them in person and making participation easy.

- Record, update, and employ data for documenting member participation, measuring progress, and determining next steps.

- Draw from a common set of skills that includes list building, research, the organizing conversation, assessments, charting, mapping, leadership identification and development, and committee building.

- Employ strategies of escalating tactics for applying steadily increasing internal and external leverage to counteract opposition.

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

Building Power: The Campaign Debrief

Power Tools

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

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

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

1. Set the Time(s)

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

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

2. Set an Agenda

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

3. Learning, Not Finger Pointing

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

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

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

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

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

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

Organizing for Community Support

Community Organizing Tools

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

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

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

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

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

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

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