LEAD! Leadership & Organizing in Action (LOA) Community Organizing Workshop:

Building Shared Power, Shared Purpose & Collective Capacity

Telligen LEAD! LOA Team

Participant Guide

Based on the work of Marshall Ganz of Harvard University

Modified & adapted for this workshop by Risa Hayes and Meredith Koob

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ACKNOWLEDGMENTS

We welcome your suggestions for improving this activity workbook for future training sessions. You are also welcome to use it and adapt it for your own training needs, subject to the restrictions below.

RESTRICTIONS OF USE

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10:20-10:30a	**Wellness Break**	
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Welcome & Goals

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Workshop Goals:

During this workshop, participants will learn about five key practices of leadership:
- **Shared Story**: The powerful art and skill of crafting a compelling public narrative to move people to action.
- **Shared Commitment**: Building intentional, strong, strategic relationships.
- **Shared Structure** Creating the conditions for high-performing and interdependent teams.
- **Shared Strategy**: Designing capacity-building action plans based on a shared motivating vision.
- **Shared Action**: Mobilizing teams, coalitions, and communities to coordinated action for both short and long-term change.

These five leadership practices are basis of the organizing framework codified by Marshall Ganz based on his years of organizing in and research on social movements. He cut his teeth as a young organizer in the Civil Rights movement, worked with the United Farm Workers in the 1960s and 70s, and has advised unions, non-profits, and political organizations for decades. Dr. Ganz was a key trainer and organizing strategist behind the U.S. presidential campaigns of 2008 and 2012, and currently teaches Leadership & Organizing at Harvard Kennedy School.

During this workshop, you will be asked to tell your story of why you've committed to work as leader in the effort to improve health, healthcare, and aging, to build relationships with others around a common purpose, to devise strategies, and to begin taking the action required to achieve your measurable goals.

Please bring an "exploratory" spirit to this workshop – try new things, take some risks, ask new questions.

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WELCOME

In choosing to be here today you are giving your time and energy to further developing your skills and capacity lead change, improvement, and regeneration in your community. Thank you for being here!

Sustainable and effective change requires intentional leadership that is woven into human interactions. Over the last several years, change leaders in many sectors have begun to look toward the wisdom of community organizing to lead groups to action more powerfully and efficiently. Effective change leaders learn to build a community that enables a group of people to turn its resources into the power they need to make change – **to shape the future they want to live into**. In short, leadership in organizing is about equipping people with the power to make real change.

This training aims to support you in developing your capacity for effective leadership, collective action, community organizing, and regenerative change.

We begin this work by exploring the following questions:

> Why am I called to this work? Why am I called to leadership in my community? How will I move others to join me? How will we develop strategy and structure our work together? And how will we achieve our goals?

Our work is guided by our definition of **leadership:**

> Leadership is accepting responsibility for enabling others to achieve purpose in the face of uncertainty.

All of you here today share common values that have led you to work together as stewards for the future of health, healthcare and aging services in your community. We will focus our efforts in this workshop on learning how to articulate those values, define your common purpose and strategize together to achieve the outcomes for which you are all striving.

In reading this workbook, we ask that you keep two things in mind:

1. Remember that leadership is above all a practice. We learn to lead by leading. We learn to organize by organizing, not (just) by reading about it. This guide is meant to get you started and serve as a resource, but the best way to learn this framework is to practice - get out and do it!

2. This framework is just that, a framework, not a formula. Our goal here is to present some concepts and tools that many organizers and change leaders around the world have found to be effective and, instrumental in reaching shared goals.

We hope you find it useful, both during this workshop and as you lead change.

Sincerely,
Risa Hayes & Meredith Koob

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ORGANIZING
IN ACTION

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COVENANTS OF PRESENCE*

1. **BE FULLY PRESENT, EXTEND AND PRESUME WELCOME.**
Set aside the usual distractions of things undone from yesterday, things to do tomorrow. Welcome others into this space and presume you are welcomed as well.

2. **LISTEN GENEROUSLY.**
Listen intently to what is said; listen to the feelings beneath the words. As Quaker Douglas Steere writes, "To listen another's soul into life, into a condition of disclosure and discovery may be almost the greatest gift we can offer to another."

3. **AUTHOR YOUR STORY.**
We all have a story. Some might say, "I don't have a story" or "a story worth telling," but you do, and the world needs to hear it. Claim authorship of your own story and learn to tell it to others so they might understand you, be inspired by you and discover what calls you to be who you are, to do what you do or to love what you love.

4. **WE COME AS EQUALS.**
We don't have the same gifts, limits, or experiences, but no person's gifts, limits or experiences are more or less important than another's.

5. **IT IS NEVER" SHARE OR DIE."**
You will be invited to share stories in pairs and in a large group. The invitation is exactly that. You will determine the extent to which you want to participate.

6. **NO FIXING.**
We are not here to set someone else straight, right a wrong, or provide therapy.

7. **SUSPEND JUDGMENT.**
Set aside your judgments. By creating a space between judgments and reactions, we can listen to another person, and to ourselves, more fully.

8. **TURN TO WONDER.**
If you find yourself becoming judgmental, cynical, or certain about what you know, try turning to wonder: "I wonder why she shared that story or made those choices?" "I wonder what my reaction teaches me?" "I wonder how my story connects to their stories?"

9. **HOLD THESE STORIES WITH CARE.**
Many people will benefit from what they hear during our time together. Be mindful, attentive, and open.

10. **BE MINDFUL AND RESPECTFUL OF TIME.**
We all have something important to share and the discipline of time invites us to focus and make particular choices about what, and how much to share so that we might hear each other more deeply.

11. **PRACTICE CONFIDENTIALITY CARE.**
We create a safe space by respecting the nature and content of the stories heard. If anyone asks that a story shared be kept in confidence, the group will honor that request.

12. **WELCOME DISCOMFORT.**
In the midst of new and uncomfortable places and the company of strangers, move against an instinct to hide or to check out. In what causes unease, see another world to be discovered.

13. **LOVE THE QUESTIONS THEMSELVES.**
Let your questions linger. Release the compulsion to answer them or to have them answered. Trust the questions to guide you toward loving first what you do not altogether understand. As the poet Rainer Maria Rilke says, "Have patience with all that remains unsolved within your heart."

14. **BELIEVE THAT IT IS POSSIBLE.**
Believe that it is possible for us to emerge from our time together refreshed, surprised and less burdened than when we came. Expect that our work together can provide renewal, refreshment, and possibilities for what we can do together to create the future that is waiting to be born, and that seeds planted here will keep growing and flourish in the days ahead in the service of our work in this community.

Adapted from Touchstones used in The Center for Courage and Renewal's Circles of Trust Retreats

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*What would you most like to get from this workshop?*

What kinds of skills are you interested in learning?

What contributions do you see yourself making?

This workshop offers you a motivational, conceptual, and practical introduction to the practice of leadership and organizing.

Organizing is **a practice – a way of *doing* things**. As a practice, leadership is learned experientially, combining "heart, head, hands." Much like learning to ride a bike, we can't just read about it, we need to get on the bike and try it out. And, when you get on the bike for the first time, you'll be a little wobbly and may fall. That's where the "heart" comes in - either you give up and go home or you find the courage to get back on, knowing you may fall again, because that's the only way to learn to keep your balance. Learning a practice, like leading change, requires motivation, a grasp of core concepts and, of course, practice – again and again and again.

To this purpose, each of our sessions will follow the same pattern: explanation, modelling, practice, debriefing.

Explanation ➡ **Modeling** ➡ **Practice** ➡ **Debriefing**
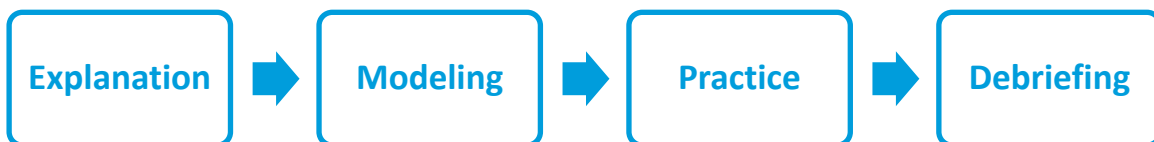
Organizing is **a framework – a way of *understanding* things**. These organizing practices are based on practices drawn from years and years of community organizing in everyday life. They can feel like "natural capacities" – forming a relationship, telling a story, making a plan. In this workshop we treat these everyday practices as objects of **mindful reflection**. The challenge is to step back from habitual activities for a moment, reflect on them more deeply, and bring greater intentionality to them so that they can become elements of the *craft of leadership*. Like any framework, ours is not a recipe, and requires constant testing, evaluation, and adaptation.

Each section of the workshop is designed in such a way that the content of what we teach – **leadership as organizing** – is modelled **in the way we teach**. We begin with explanation (conceptual), we observe models (practice), we practice, and then we debrief our practice (reflection). Our modelling of leadership in coaching small groups, for example, demonstrates the leadership practices we teach. Our modelling of 'reflective practice' enables participants to do so as well.

The workshop will be conducted in both large and small group learning teams of 4-8 people. The training and coaching team will both support you and challenge you – proving both scaffolding and testing, always with respect to specific outcomes in real time.

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Leadership & OrganizingOverview

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- Organizing is leadership that enables people to turn the resources they have into the power they need to make the change they want.
- Organizing is both a framework and a practice, and there are five key leadership practices within this framework: telling stories, building relationships, structuring teams, strategizing, and acting.
- The first question an organizer asks is "who are my people?" not "what is my issue?"
- Strong relationships are the foundation of successful organizing efforts.

> *"A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves."*
> *~ Lao Tzu*

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Goals for this Section:

☐   To provide an overview of the leadership and organizing framework
☐   To introduce the five key leadership practices
☐   To begin to articulate what you're working toward and draft an Organizing Statement

Isolation prevents people from understanding their shared self-interest with others—it keeps their problems private and personal. The problems that people regularly face (e.g., physical and mental health problems, crime or lack of safety, lack of education, debt, divorce, unemployment, job dissatisfaction, sickness and aging, death, incarceration, community deterioration) are typically experienced as private pain. Reed (2008) suggests that society fosters the privatization of pain. As long as pain is privatized, citizens are isolated in their experiences of hardship. They are also isolated in their attempts to make change, and that isolation prevents them from operating with power.

Organizing enables individuals to join in community to be transformed into a constituency that is mobilized towards a common goal. It is a form of leadership that enables the constituency to use its resources to make change based upon the mastery of five key skills:

- **Shared Story**: The powerful art and skill of crafting a compelling public narrative to move people to action.
- **Shared Commitment**: Building intentional, strong, strategic relationships.
- **Shared Structure**: Creating the conditions for high-performing and interdependent teams.
- **Shared Strategy**: Designing capacity-building action plans based on a shared motivating vision.
- **Shared Action**: Mobilizing teams, coalitions, and communities to coordinated action for both short and long-term change.

Because organizing equips people with the skills they need to enact change, organizing is also a form of leadership development. In this context, **leadership is defined as "taking responsibility for enabling others to achieve common purpose in times of uncertainty."** This definition of leadership is not about one individual doing extraordinary things or leading from the top-down. Rather, it is about creating the conditions that make it possible for others to become agents of change operating with collective power.

In combining with one another, people discover shared values they may not have recognized when isolated or acting alone; and they work together based on shared interests in an outcome that is best realized through the commitment of their collective resources.

PEOPLE, POWER, CHANGE

People: Organizing a Constituency

The first question an organizer asks is not "What is my issue?" but "Who are my people?" Who is my constituency? A constituency is a group of people who are "standing together" to assert their own goals. Organizing is not only about solving problems. It is about the people with the problem mobilizing their own resources to solve it… and keep it solved.

Power: What is it? Where does it come from? How does it work?

Rev. Martin Luther King described power as the "**ability to achieve purpose**." It is the capacity we can create by combining our resources and using them creatively to achieve a common purpose.

So power is not a thing, quality, or trait – it is the influence created by the relationship between interests and resources. You can "track down the power" by asking – and getting the answers to – four questions:

1. What are the interests of your constituency?
2. Who holds the resources needed to address these interests?
3. What are the interests of the actors who hold these resources?
4. What resources does your constituency hold which the other actors require to address their interests?

Our power comes from joining with people – the same people who need change can organize their resources into the power they need to create change. The unique role of organizing is to enable the people who need/want the change to be the authors of the change, because that changes the causes of the problem (powerlessness in one form or another), not only the problem.

Organizing power begins with the commitment of the first person who wants to make it happen. Without this commitment, there are no resources with which to begin. Commitment is observable as action. The work of organizers begins with their acceptance of the responsibility to challenge others to do the same.

Change: What kind of change can organizing make?

Change is specific, concrete, and significant. It requires focus on goals that will make a real difference that we can see. It is not about "creating awareness," having a meaningful conversation, or giving a great speech, although those may be tactics you employ. It is about specifying a clearly visible goal, then mobilizing your resources to achieve it. This is why people who don't consider themselves 'organizers' are adopting these practices.

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What is our motivating vision?

Our motivating vision will articulate both a "**nightmare" – a concrete, urgent need for change** – and will contrast this challenge with a "**dream" – a source of hope**.

THE NIGHTMARE VS THE DREAM: When thinking about our motivating vision it often helps to visualize the world as it is and then describe how the world will be different once our vision is realized.

- What is the intolerable condition that we want to end or avoid?
- Why is it urgent now?
- What is at stake?
- What will happen if we don't act?
- What could happen if we do?

As you consider these questions, try to be as specific as possible. Once you've explored these questions, you can begin to outline your plan by drafting an 'organizing statement'.

TRANSLATING SHARED PURPOSE INTO STRATEGY: Prepare an *"organizing statement":*

"We are organizing _____ (WHO: constituency, resources)

to do _____ (WHAT: measurable goal)

by _____ (HOW: tactic #1, tactic #2, tactic #3)

in order to _____ (WHY: motivating vision)

by _____ (WHEN: timeline)."

The Five Leadership Practices

Organizing people to build the power to make change is based on mastery of five key leadership practices. These five practices can change individuals, how their groups operate, and how the world looks, feels, and is. The practices enable a collective movement from passivity towards change.

DISORGANIZATION	LEADERSHIP PRACTICES	ORGANIZATION
Passive	Shared **Story**	Motivated
Divided	Relational **Commitment**	United
Drift	Clear **Structure**	Purposeful
Reactive	Creative **Strategy**	Initiative
Inaction	Effective **Action**	**Change**

1. Creating Shared Story: *Organizing is rooted in shared values expressed as public narrative.* Public narrative is how we communicate our values through stories, bringing alive the motivation that is a necessary pre-condition for changing the world.

2. Creating Shared Relational Commitment: *Organizing is about creating mutual commitments to work together through values-based relationships.* It is the process of association– not simply aggregation - that makes a whole greater than the sum of its parts. Relationships are built through intentional interactions, in which people share their experience, values and interests. Relationships are rooted in commitments people make to each other, not simply commitment to an idea, task, or issue.

3. Creating Shared Structure: *A team leadership structure that grows capacity and develops leadership through their work together.* Coalition efforts often flounder due to a failure to put in place enabling structures. Structured leadership teams foster stability, motivation, creativity, and accountability – and use time, skills, and effort effectively. They create the structure within which energized members can accomplish challenging work.

4. Creating Shared Strategy: *Although based on broad values, effective organizing requires that we identify and focus on a clear strategic objective;* Narrowing and focusing on a strategic objective is a key to unleashing our creativity and turning our values into action.

5. Creating Shared Measurable Action: *Organizing outcomes must be clear, measurable, and specific.* This allows us to evaluate progress, practice mutual accountability, and adapt strategy as needed, based on experience.

Those five organizing practices form the core of this training on leadership in organizing.

Further Reading
Ganz, M. (2010). "Leading Change: Leadership, Organization, Social Movements." In N. Nohria & R. Khurana (Eds.), the Handbook of Leadership Theory and Practice (pp. 509-550). Danvers: Harvard Business School Press.

For a full list of writings by Marshall Ganz, visit http://marshallganz.com/publications

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PRACTICE ACTIVITY #1: **Explore the Organizing Statement**

TIME: ~20m

GOALS:

- Familiarize yourself with the Organizing Statement as a strategy tool.
- Review the components of an Organizing Statement to begin to get clear on your collective goal and the strategies you'll use to meet that goal.
- Draft an Organizing Statement focusing on one of your HTP measures

AGENDA:

1.	Follow the prompts from the trainer to practice this tool	
2.	Choose one of your most challenging HTP Measures	
3.	Review and use the worksheets on the following pages	~20m
4.	Consider how you might use this tool with your team and partners to get clear on your measurable goals, motivating vision, strategy and tactics.	

WORKSHEET #1: **Articulating the Nightmare & the Dream**

Before you start drafting your own Organizing Statement, explore these questions to get clear on what you're working for. As you consider these questions, try to be as specific as possible.

1. What is the intolerable condition that we want to end or avoid?

2. Who is currently living this nightmare and/or is at risk of living the nightmare?

3. Why is it urgent now? Is there a particular deadline or risk of worsening? Is there an opportunity that you don't want to miss?

4. What is at stake?

5. What will happen if we don't act?

6. What could happen if we do?

7. What is your dream of the future? What could life in your community look like?

8. What measurable goals or steps would get you toward your vision?

9. What will it take to bring the dream to fruition?

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WORKSHEET #2: **Drafting an Organizing Statement**

Once you've explored the questions above, you can begin to outline your plan by drafting an 'organizing statement'. After this workshop, you can work with the rest of your team or coalition to refine your collective organizing statement together.   Keep in mind: The Organizing Statement is NOT really meant to be clean, polished marketing language, but rather a tool to help you and your team get really clear on what you're setting out to do. You'll likely have many versions and iterations as you get deeper into your work. Give it a try!

We are organizing **WHO (Constituency):**

To Do **WHAT (Measurable Goal):**

By **HOW (Tactics):**

In order to **(Motivating Vision):**

By **WHEN**:

When the work is not progressing as desired, ask:
- ▪ Is it a strategy issue (the head of the work)? *Revisit the Who and What*
- ▪ Is it an action issue (the hands of the work)? *Revisit the How/Tactics/Interventions*
- ▪ Is a motivational issue (the heart of the work)? *Lean on your Motivating Vision*

Without the heart, heads, and hands all involved – progress will be slower. It takes all three.

WORKSHEET #3: **Organizing Statement**

TIME: ~20m
GOALS:
- Jointly draft an Organizing Statement with your team focusing on one of your HTP measures – either refining the Organizing Statement you previously drafted or choose a different measure and start a new Organizing Statement.

AGENDA

1.	Choose one of your most challenging HTP Measures	
2.	Use the worksheet below to draft or refine an Organizing Statement	~20m
3.	Use the template/worksheet below to refine your organizing statement	

We are organizing **WHO (Constituency, resources):**

To Do **WHAT (Measurable Goal):**

By **HOW (Tactics):**

In order to **(Motivating Vision):**

By **WHEN** (Specific Date):

The Art & Skill of Public Narrative
Shared Story

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- Effective leaders tell stories to communicate shared values and to motivate people to take action.
- A story structure is made up of three elements: plot, character, and moral, but a story comes alive when the character faces a challenge, makes a choice, and experiences the outcome.
- The Public Narrative framework is comprised of a Story of Self, a Story of Us, and a Story of Now
- Learning to craft and re-craft your Public Narrative is a leadership practice.

"The Jewish scholar, Hillel once said, 'If I am not for myself, who will be for me? And if I am not for others, what am I? And if not now, when?' These three questions call out for a story of self, a story of us, and a story of now. Those who hope to lead, must first tell those stories."
~ Marshall Ganz

Goals for this Section:

- ☐ To learn the basics of how public narrative works: values, emotion & story structure
- ☐ To begin to explore and understand your own story – your own "why"
- ☐ To begin drafting your story of self

Public Narrative as a Leadership Practice

Leadership is about accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty. Narrative is how we learn to access the moral resources – the courage – to make the choices that shape our identities – as individuals, as communities, as a state.
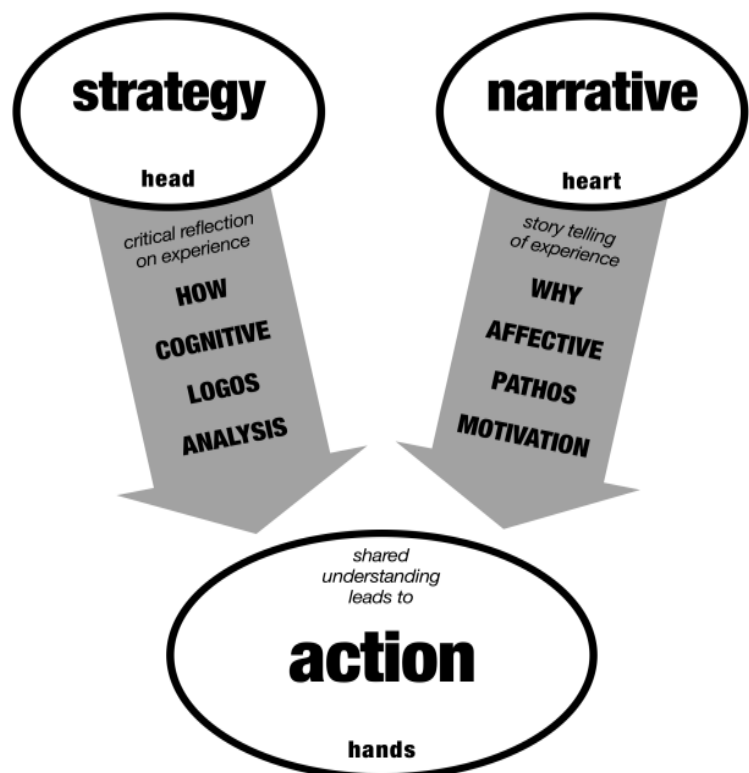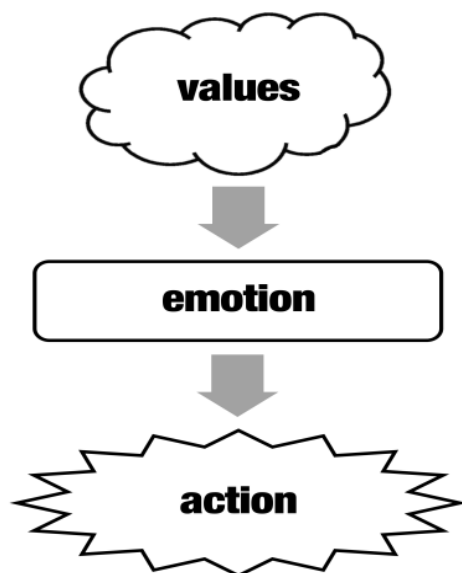
Each of Us has a Story to Tell

Each of us can learn to tell a story that can move others to action. We each have stories of challenge, or we wouldn't think the world needed changing. And we each have stories of hope, or we wouldn't think we could change it. As you learn this skill, you will learn to tell a story about yourself (story of self), the community whom you are *organizing* (story of us), and the action required to create change (story of now). You will learn to tell, to listen, and to coach others.

Why Public Narrative?

two ways of knowing

Leadership requires engaging the "head" and the "heart" to move the "hands" – mobilizing others to act together purposefully. Leaders engage people in interpreting why they should change their world – their motivation – and how they can act to change it – their strategy. Public narrative is the "why"—the art of translating values into action through stories.

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The key to motivation is understanding that values inspire action through emotion.

Emotions tell us what we value in ourselves, in others, and in the world. And it is through emotion that we can express their motivational content to others. **Stories enable us to communicate our *feelings* of what matters, not just our *ideas* of what matters.** Because stories allow us to express our values not as abstract principles, but as lived experience, they have the power to move others.

Some emotions <u>inhibit</u> action, while others <u>facilitate</u> action.

The language of emotion is the language of movement – they actually share the same root word. Mindful action is inhibited by inertia, fear, self-doubt, isolation, and apathy. Action is facilitated by urgency, anger, solidarity, hope, YCMAD (you can make a difference). Stories enable us to leverage the emotions that encourage mindful action to overcome the emotions that inhibit it.
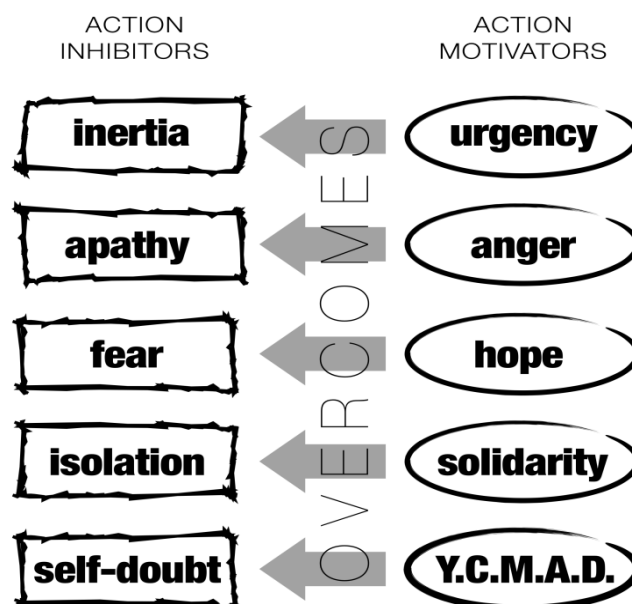
Public narrative combines a story of self, a story of us, and a story of now.

A "story of self" communicates the values that called you to leadership
Leaders face the challenge of enabling others to "get" the values that move them to lead. Effective communication of motivating values can establish grounds for trust, empathy, and understanding. In its absence, people will infer our motivations, often in ways that can be very counterproductive. Telling our story of self can help establish firm ground upon which to lead, collaborate with others, and discover common purpose.

> "If you don't tell your own story, someone else will. *And you may not like the story they tell."*
> *~Marshall Ganz*

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

The key is to **focus on choice points**, those moments in our lives when our values influenced the choices we made and shaped who we have become. When did you first care about being heard? When did you first experience injustice? When did you feel you had to act? Why did you feel you could? What were the circumstances – the place, the colors, sounds – what did it look like? The power in your story of self is to reveal something of those moments that were deeply meaningful to you in shaping your life's trajectory —not your deepest private secrets, but the events that shaped your public life. Learning to tell a good story of self demands the courage of introspection – and of sharing some of what you find.

A "Story of us" communicates values that inspire others to act by identifying with each other
Just as with an individual, a community may face key choice points – its founding, a crisis it faced, or a critical event that everyone remembers? What shared values were expressed in those choice points? Consider stories of experiences that members of your group have shared, especially those that held similar meaning for all of you. The key is to focus on telling a specific story about specific people at a specific time that can call everyone's attention to values that you share, and the challenge to those values that the community was or is experiencing. Telling a good story of us requires the *courage of empathy* – to consider the experience of others deeply enough to take a chance of articulating that experience.

A "Story of Now" communicates an urgent challenge we are called upon to face, the hope we can face it, and the choices we must make to act
A story of now requires telling stories that bring alive the urgency of the challenge you face – urgent because of a need for change that cannot be denied, urgent because of a moment of opportunity to make change that may not return. At the intersection of the urgency of challenge and the promise of hope is a choice that must be made – to act, or not to act, to act in this way, or in that. Telling a good story of now requires the *courage of imagination*, or as Walter Brueggemann named it, a prophetic imagination, in which you call attention both to the pain of the world and also to the possibility for a better future.

PRACTICE ACTIVITY #2: **Finding your *WHY***

TIME: 10m

GOALS:

- ☐ Begin to familiarize yourself with public narrative
- ☐ Understand what calls you to the work you do and to leadership
- ☐ Draft your "Why"

AGENDA:

1.	Follow the prompts from the trainer to practice this tool	
2.	Using the worksheet/s below, begin to answer the questions, draft your story, sketch your story, etc. to get clear on why you care, personally, about this work and what your goal is. ▪ Speak from the heart, not the head – this is not an essay or a job interview, it's a story to help you connect with your audience, your partners, your community ▪ Recall specific events and experiences in your life – what did you feel, see, hear, taste, etc. ▪ Ask "Why?" five times (or as many as you need to go deeper into your own "Why"	~10m
3.	Rejoin the big group for debrief	

WORKSHEET #4: **Finding Your Why**

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

1. Why do I care about this issue? Why did I decide to tackle this specific injustice or problem and work on this effort with this group?

2. What specific experience have I had that led me to care deeply enough to act?   How did they feel? What do these feelings tell me about my values?

3. What values move me to act? Have these values always been important to me? If not, when did that change? How might they inspire others to similar action?

4. What stories can I tell from my own life about specific people or events that would show (rather than tell) how I learned or acted on those values?

5. What is my purpose in calling on others to join me in action? What will I be calling on them to do?

6. What stories can I tell from my own life about specific people or events that would show, rather than tell, how I learned or acted on those values?

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

FAMILY & CHILDHOOD	LIFE CHOICES	ORGANIZING EXPERIENCE
Parents/Family	School	First Experience of Organizing
Growing Up Experiences	Career	Connection to Key Books or People
Your Community	Partner/Family	Role Models
Role Models	Hobbies/Interests/Talents	
School	Experiences Finding Passion	
	Overcoming Challenge	

Think about specific events or experiences. What were the challenges you faced? What choices did you make? What were the outcomes? The outcome might be what you learned, in addition to what happened. <u>Try drawing pictures here instead of words</u>. Powerful stories leave your listeners with images in their minds that shape their understanding of you and your calling.

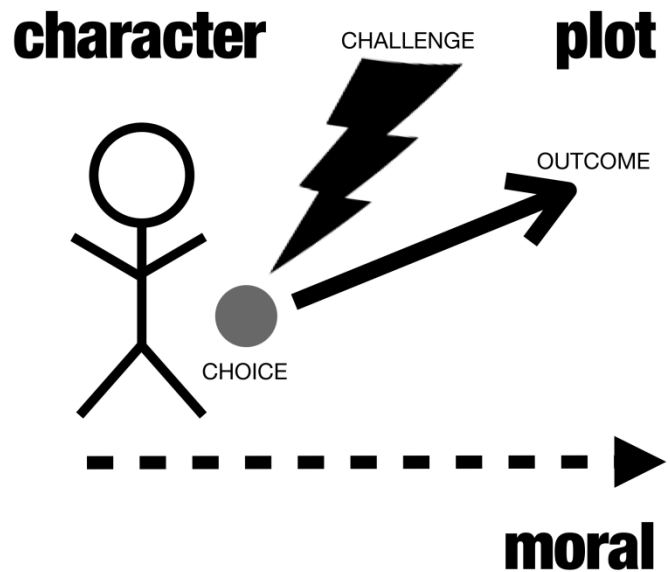| CHALLENGE/S:	CHOICE/S:	OUTCOME/S:

What turns recounting into a story?

Three key elements: challenge / choice / outcome

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

Because we can empathetically identify with the character, we can "feel" the moral. We not only hear "about" someone's courage; we can also be inspired by it.

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

Incorporating Challenge, Choice, and Outcome in Your Own Story

There are some key questions you need to answer as you consider the choices you have made in your life and the path you have taken that brought you to this point in time as a leader. Once you identify a specific relevant choice point, perhaps your first true experience of community in the face of challenge, or your choice to do something about injustice for the first time, dig deeper by answering the following questions.

Challenge: Why did you feel it was a challenge? What was so challenging about it? Why was it your challenge?

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

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

A word about challenge. Sometimes people see the word challenge and think that they need to describe the misfortunes of their lives. Keep in mind that a struggle might be one of your own choosing – a high mountain you decided to climb as much as a valley you managed to climb out of. Any number of things may have been a challenge to you and be the source of a good story to inspire others.

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WORKSHEET #5: **PUBLIC NARRATIVE DEMO/EXAMPLE**

We will listen to a model of public narrative. While you listen, think about the elements of SELF – US – NOW that you hear in their story.

Use this worksheet to note the elements of the public narrative example.

S E L F	U S	N O W
What are his/her experiences and values that call him/her to lead change?	*Who is the "us" that he/she identifies? What are the common values he/she appeals to? How do they do it??*	*What challenge to those values does he/she identify? What is the strategy to overcome this challenge? What is the first step that each person can take to be part of the solution? Is it clear?*

1.   What challenges, choices, and outcomes made up each part of the story? What choices is the storyteller asking the listeners to make?

2.   What values does each of those choices convey?

3.   What details or images in particular caught your attention and <u>also</u> reflected those values?

4.   When did the storyteller shift from a story of self to a story of us? When did he/she shift from a story of us to a story of now?

PRACTICE ACTIVITY #3: **Story of Self**

TIME: 30-35m

GOALS:
- ☐ Draft your story of self
- ☐ Practice telling your story of self and receiving coaching from your Small Group Coach
- ☐ Listen to your table mates' stories of self and practice using the coaching form

AGENDA:

1.	Gather in your Triad and each of you count off "1, 2, 3" to determine the order – write down your number	<1m
2.	Person #3 – set your phone timer for 5 minutes with an audible noise. Start the time when the trainer says to start.	
3.	Use worksheet #5 or the space below to **silently develop/draft/sketch your Story of Self**	5m

4.	Practice:
	   ▪ Decide the order of story tellers
	   ▪ **Story Telling**: Each person will take turns telling their Story of Self: **LISTENER– set the timer for 2m**
	       o Focus on the values you want to convey—what specific choices shaped or reflect those values in your life?
	       o Be specific & give a few well-chosen vivid details
	 NOTE: You have just 2 minutes to tell your story. Stick to this limit. Make sure your timekeeper cuts you off. This encourages focus and makes sure everyone has a chance to tell their story.
	
	   ▪ **Coaching**: Listeners can use this page or worksheet #6 while you're listening to the story teller. Listeners will provide brief coaching during this practice **LISTENER/COACH– set the timer for 6m** for coaching – focus on the following feedback:
	       o What **values** did you connect with?
	       o What **challenges, choices & outcomes** did you hear?
	       o What **details** or **images** stood out for you (sights, smells, sounds, emotions?
	       o How can the storyteller more effectively convey why they are called to this work? to leadership?
		~30m
		
		 (8m per person: 2m story; 6m coaching)

5.	Rejoin the big group for Debrief	

WORKSHEET #6: **Coaching Story of Self**

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

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

1. **START BY ASKING:**

   "*How did that go for you? How did you feel telling your story?*"

   "*If you were to tell it again, would you change anything in the telling? If yes, what would you do differently?*"

   Then, note some of your first impressions and give them space to speak to what you noticed.
   "*I noticed you did _____ or made this decision in telling your story, why did you do that?*"

   "*You said _____ in telling your story, what did you mean by that?*"

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

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

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

   "*The challenge wasn't clear. How would you describe _____?*"

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

   "*To me, the choice you made was _____, and it made me feel _____.*"

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

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

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

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

   "*Your story made me feel _____ because _____.*"

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

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

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

   "*Try telling more details about _____ so we can imagine what you were experiencing.*"

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We all live very rich and complex lives with many challenges, many choices, and many outcomes of both failure and success. That means we can never tell our whole life story in 2 minutes. The challenge is to learn to interpret our life stories as a practice, so that we can teach others based on reflection and interpretation of our own experiences, and choose stories to tell from our own lives based on what's appropriate in each unique situation.

Take time to reflect on your own public story, beginning with your story of self.   You may go back as far as your parents or grandparents, or you may start with your most recent experiences and keep asking yourself why in particular you got involved when you did. Focus on challenges you had to face, the choices you made about how to deal with those challenges, and the satisfactions – or frustrations - you experienced. Why did you make those choices? Why did you do this and not that? Keep asking yourself why.

What did you learn from reflecting on these moments of challenge, choice, and outcome? How do they feel? Do they teach you anything about yourself, about your family, about your peers, your community, your nation, your world around you - about what really matters to you? What about these stories was so intriguing? Which elements offered real perspective into your own life?

Many of us have stories of both loss and hope. If we did not have stories of loss, we would not understand that loss is a part of the world, and we would have no reason to try to fix it. But we also have stories of hope. Otherwise, we wouldn't be trying to fix it.

Linking Self, Us & Now
Shared Story

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- The story of 'us' expresses the values and shared experience of the 'us' we are organizing right now. Our 'us' can and will change depending on who we're speaking to.
- The goal of the Story of Us is to create a sense of unity, togetherness, and focus on the shared values of your listeners
- The story of now is a challenging vision of what will happen if we do not act, AND a hopeful vision of what could be if we do.
- A "story of now" is urgent and it requires dropping other things and paying attention.
- Storytelling is dynamic and takes practice- each time you tell your story you will adapt it – to make yourself clearer, to adjust to a different audience, to locate yourself in a different context

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Goals for this Section:

☐ To better understand the purpose for and elements of a compelling public narrative
☐ To understand and begin to develop a **story of us** specific to the people in this room and in your community.
☐ To learn how to communicate the core values of the community you're building that will allow others to identify with each other and join in common action.
☐ To understand and develop a **story of now** with a clear and urgent challenge, a detailed motivating vision, and a choice you are calling upon others to make.
☐ To learn how **to integrate** your stories of self / us / now into a powerfully compelling public narrative.
☐ To learn to coach others' stories by listening carefully, offering feedback, and asking skillful questions

Linking the Story of Self and Story of Us

A story of self tells people who you are and why you are called to do the work that you are doing. The goal is for them to "get you," to connect with you. Since organizing is about building power with others for shared action, your public narrative also needs to tell a story of the values shared by those whom you hope to move to acting together. The test of a story of us is whether or not they "get" their connection with each other.

A Story of Us expresses the values and shared experience of the 'us' you want to evoke at the time. This means our 'us' can and will change depending on who we're speaking to. The goal is to create a sense of unity, togetherness, and focus on the shared values of your listeners.

Similar to a Story of Self, a Story of Us focuses on choice points, but this time, the character in your Story of Us is the community you are motivating to act, and the choices are those the community has faced. That said, a compelling Story of Us doesn't just highlight challenges, it **also lifts up stories of success to give people hope**. As Ganz writes, "Hope is one of the most precious gifts we can give each other and the people we work with to make change."

Our story of self is interwoven with stories we share with others through communities we are a part of, which have stories of their own. These include stories of our family, community, faith tradition, school, profession, movements, organizations, nations and, perhaps the world. It is through shared stories that we establish the identities and express the values of the communities in which we participate (family, faith, nation) and of new communities we are forming (new social movements, new organizations, new neighborhoods).

Telling a "story of us" requires learning how to create narrative from the experiences that the people in the room share. It also means lifting up the values on which you will be challenging them to act. This story of us may well reach beyond the people in the room, drawing in a wider range of experience, and larger stories of us, but to be effective it must be rooted in the experience of the people in the room.

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# Narrative Structure: challenge / choice / outcome

Just like in your Story of Self, your Story of Us has a clear challenge, choice, and outcome:

The Challenge: The challenges our community has faced in the past, or faces now (made real with stories, images, and details, not statistics).

The Outcome (hope): Stories with vivid images that remind our community of what we've achieved and been through. Your own experiences of hope, experiences that point to your future.

The Choice: For a story to be a story, it centers on a "choice." In a story of us, **that choice is one that met challenge with action, and thus can be a source of hope**. Founding stories recount choices made by those who initiated the community, enabling us to experience the values that motivated them. Choices made by people in the course of this workshop – to take risks, to be open to learning, etc. – can become part of the "story of us."
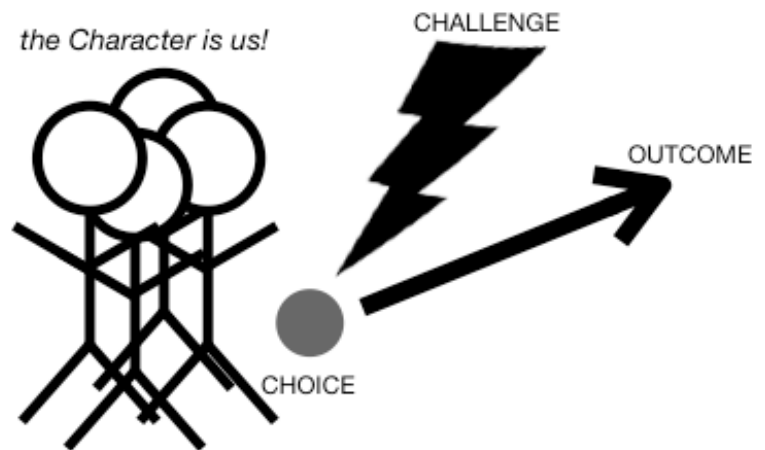
Stories can shift power dynamics by building new community and capacity

Often after we've heard others' stories of self and we've started building relationships together, we discover that we face similar challenges that are rooted in very deep systems of power inequality or privilege. Learning to tell stories of Us is a way to begin to join our stories together and acknowledge those shared challenges and the roots of the problem as a community – breaking down the barriers that have led to isolation and the privatization of pain.

However, a good story of us doesn't just convey the root of our challenges, but also lifts up our heroes, and stories of successes – large or small. Those stories give us hope that if we come together and take action as a community, we can uproot some of the underlying causes of our suffering and prevent us from operating with power.

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A challenging vision of what will happen if you do not act, a hopeful vision of what could be if you do act & the urgent choice to act now

We know why we've been called to a particular mission, we know something of who it is we want to call upon to join us in that mission, so what action does that mission require of us right here, right now, in this place?

When you tell a powerful Story of Now and ask others to make a specific choice to join you in action, you are beginning to build new power together from the community around you to address the challenges in your lives. A "story of now" is urgent, it requires dropping other things and paying attention, it is rooted in the values you celebrated in your story of self and us and requires action.

The "character" in a story of now is you, the people in the room with you, and the broader community whom you hope to engage in action.

The Elements of a Story of Now

- **Challenge** (or "nightmare") – A vivid image of what the future could be if we fail to act now (made real through stories not just statistics)
- **Outcome** (or "dream") – A vivid image of what the future could be if we do act
- **Choice** – A strategic "hopeful" choice that each person in your audience can make right now

Why it Matters

The choice we're called on to make is a choice to take strategic action now. Leaders who only describe problems but fail to identify opportunities to act and bring others together to address the problem, aren't very good leaders. If you are called to address a real challenge, a challenge so urgent you have motivated us to face it, then you also have a responsibility to invite us to join you in action that has some chance of success. A "story of now" is not simply a call to make a choice to act – **it is a call to "hopeful" action**.

Linking all the Stories into a Public Narrative

"If I am not for myself, who will be for me?
When I am only for myself, what am I?
If not now, when?" *~Hillel, 1st century Jerusalem sage*
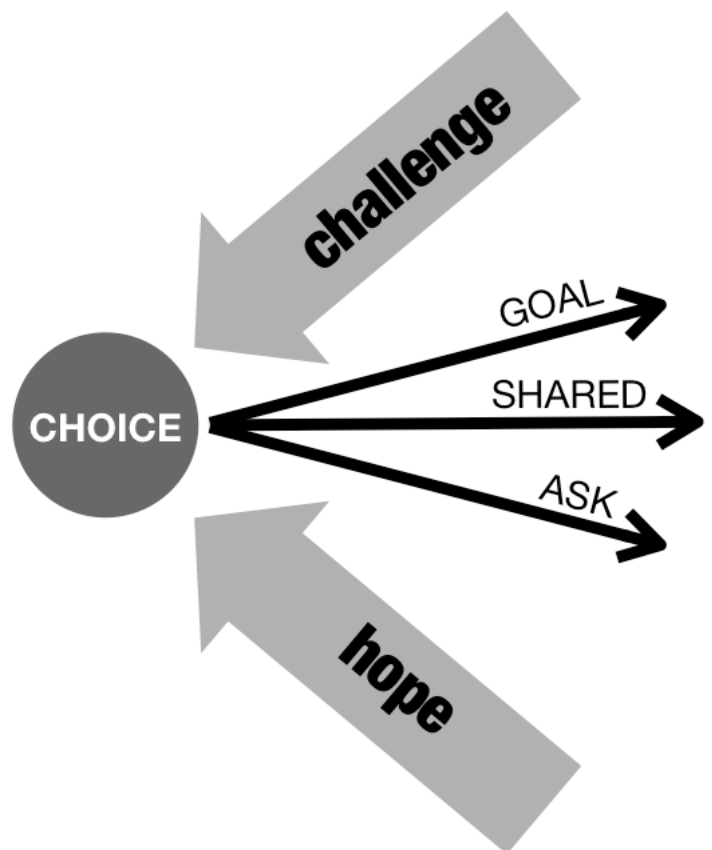
As Rabbi Hillel's powerful words suggest, to stand for yourself is the first step, but insufficient on its own. You must also find or create a community to stand with, and that community must begin acting now. To combine the stories of self, us and now, you have to find the link between why you are called to this mission, why we as a community are called to this mission, and what our mission calls on us to do now.

That linking may require you to continually rethink the stories of self, us, and now that you are working on.

Storytelling is a Dynamic, Nonlinear Process

Each time you tell your story you will adapt it – to make yourself clearer, to adjust to a different audience, to locate yourself in a different context. As you develop a story of us, you may find you want to alter your story of self, especially as you begin to see the relationship between the two more clearly. Similarly, as you develop a story of now, you may find it affects what went before. And, as you go back to reconsider what went before, you may find it alters your story of now.

Storytelling Takes Practice

Our goal is not to leave with a final "script" of your public narrative that you will use over and over again. The goal is to help you learn a process by which you can generate your narrative over and over and over again, when, where, and how you need to in order to motivate yourself and others to specific, strategic action.

Further Reading

Ganz, M. (2009). Why Stories Matter: The Art and Craft of Social Change. Sojourners. Retrieved from http://www.sojo.net/magazine/2009/03/why-stories-matter

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Sachs, J. (2012). Winning the story wars: why those who tell—and live—the best stories will rule the future. Boston: Harvard Business Review Press.

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PRACTICE ACTIVITY #4: Public Narrative – Story of Self, Us & Now

TIME: 40m

GOALS:

- ☐ Develop a story of us that communicates the experiences and core values of the community you're building to inspire others to identify with each other in common action.
- ☐ Develop a story of now with a clear and urgent challenge, a detailed vision of alternative futures, and a choice you are calling upon others to make.
- ☐ Learn to be clear and strategic about an urgent call to action.
- ☐ Learn how to integrate your stories of self / us / now into a public narrative.
- ☐ Coach others' stories by listening carefully, offering feedback, and asking questions.

AGENDA:

1.	Gather in your Triad and each of you count off "1, 2, 3" to determine the order – write down your number	<1m
2.	Person #3 – set your phone timer for 5 minutes with an audible noise. Start the time when the trainer says to start.	
3.	Use worksheet #7 or the space below to revise your Story of Self and draft your Stories of Us and Now for a draft of your full public narrative.	5m
4.	Practice: ▪ **Story Telling**: Each person will take turns telling their Public Narrative (in the order you numbered off): **LISTENER– set the timer for 3m** - Focus on the action you want to motivate your partner to commit to - Be specific & give a few well-chosen vivid details in each story NOTE: You have just 3 minutes to tell your story. Stick to this limit. Make sure your timekeeper cuts you off. This encourages focus and makes sure everyone has a chance to tell their story. ▪ **Coaching**: Each person will take turns coaching. **LISTENER/COACH– set the timer for 6m** for coaching – focus on the following feedback: - What **values** did the storyteller convey? How specifically? - What is the **challenge**, **choice** & **outcome** in each story? Write them in the boxes below. - Were there sections of the story that had especially good **details** or **images**? How did those details make you feel? - What could the storyteller do to more effectively convey why they are called to leadership in this effort? - Was there a **specific commitment** that the storyteller asked you to make?	~30m (10m per person: 3m story; 6m coaching)
5.	Rejoin the big group for Debrief	

WORSHEET #7: **Public Narrative - Linking Self/Us/Now**

S E L F	**U S**	**N O W**
2: *What story can you tell about what calls you to leadership around this specific action?*	**3:** *What stories show us why we're equipped to do this specific action? What us's can you identify? What shared experiences raise up our values?*	**1: START THIS PAGE HERE!** *What action are you asking us to join you in? What hopeful vision will motivate us? Why is there urgency of need and of opportunity?*

CHALLENGE		**CHALLENGE**		**CHALLENGE**
CHOICE		**CHOICE**		**OUTCOME** *(nightmare/dream)*
OUTCOME		**OUTCOME**		**CHOICE** *(action now)* *(urgency)*

START THIS PAGE HERE

And be sure to ask for a clear commitment!

WORKSHEET #8: Coaching Public Narrative

As leaders, we are called upon to deliver all parts of our public narrative, as well as to lead others through the coaching. In order to prepare, we need to rely on each other for coaching and critique to develop and fine-tune our narratives. These notes provide some prompts for you to draw on as you develop your narrative coaching skills.

LOOK FOR THE BASICS – THE KEY ELEMENTS OF STORY

SELF	US	NOW
What are the experiences and values that call you to assume leadership?	*What are the experiences and values of the 'us' – or people in the room that will call them to join you in action?*	*Why is it urgent to respond to the challenge? Where is the hope? What do you want to call on the people here to join you in doing? What is the outcome?*

CHALLENGE　　　　　>>　　　　CHOICE　　　　　>>　　　　OUTCOME

EMOTIONS THAT INHIBIT ACTION	EMOTIONS THAT CAUSE ACTION
Fear	*Hope*
Apathy	*Anger*
Inertia	*Urgency*
Self-doubt	*You Can Make a Difference*
Isolation	*Solidarity*

Asking Questions to Elicit Feedback	Giving Direct Coaching
• What in that story resonated for you? • What were the particularly vivid images or details that you remember? • What were you still curious about? Was there a gap? • Did you hear a challenge? What was the choice? What was the outcome? • What kind of emotions did you feel when you heard the story – motivate to action or inhibit action? • What would you have liked more of? • What were the choice points?	• Ask the teller to identify the challenge, choice, and outcome. • Identify particularly strong choice points. • Ask questions about the intended audience and the desired action or response. • Ask questions to connect the dots. • Identify themes and ask for confirmation. • Identify particularly strong images or visuals that worked. • Indicate where you saw evidence of the kinds of emotions that motivate people to take action or fall into inaction.

If your Teller…	Try this…
"I don't have a story" (usually means "a story I think is good enough")	Remind them that everyone has a story! Work to find one by gently asking questions – what matters to this person, why? When did that happen? Who was a role model? Why? Get them into their story using questions. The challenge doesn't have to be tragic – just an important choice in their life.
Avoids telling his/her OWN story (focuses on issues, like a speech)	Shift focus back to personal away from "general problems" by gently asking questions – why do these problems matter so much to you?
Avoids telling his/her OWN story	Ask for more direct experience of self, rather than a story of another person.
Is lost in the abstract	Try to minimise abstract theory, encourage person to dive in and focus on specifics of self, us and the now
Settles into rant mode	The challenges are great, and anger and emotions can spill over – ask for teller to limit the description of the challenge and work to include hope. Trust one specific moment to paint a vivid picture!
Unwinds a long biography or gives a resumé	Try to pick one choice point only. Reminder that the Now is the lens or focus point he/she should use to help identify good elements of Self and Us story.

Coaching Your Team's Public Narratives: As you hear each other's stories, keeping track of the details of each person's story will help you to provide feedback and remember details about people on your team later. Use the grid below to track your team's stories in words or images.

NAME	VALUES/DETAILS	CHALLENGE	CHOICE	OUTCOME

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Mapping Actors & Assets
Shared Strategy & Commitment

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- Leadership and organizing is based on building power through relationships.
- We devise strategy by first asking "who are our people?"
- There are five distinct groups we much consider: who is our constituency, who do we want to help us leadership, who are our supporters, who is our competition, and who is our opposition.
- We can develop our collective power by combining our resources to achieve a common purpose. We call this "**power with".**
- Economic or acquired resources tend to diminish with use, while natural resources tend to grow with use.

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STRATEGY & RELATIONSHIPS

Goals for this Section:

- ☐ To review the basics of relational strategies
- ☐ To understand power with vs power over
- ☐ To begin mapping the actors and assets in your community and understand the power dynamics and influence of these actors

Leadership and Organizing is based on Building Power in Relationship

In this context power is not something that you have by virtue of the position you hold. It is not a personal quality or a trait. Power is the influence created by the relationship between interests and resources.

Organizing allows a constituency to turn its resources into the power to make change

If your interest in my resources is greater than my interest in your resources, I can influence our exchange more than you: I have more power than you. We call this "**power over.**"

When we realize we can develop our collective power by combining our resources to achieve a common purpose. We call this "**power with**."

Our power comes from people—the people who need/want change can organize their resources into the power they need to create change. The unique role of organizing is not only to achieve a goal that can help solve the problem; it is also to enable the people who need/want the change to be the authors of the change thus altering the power imbalance that was the cause of the problem in the first place.

POWER WITH

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

POWER OVER

Sometimes others hold power over decisions or resources that we need in order to create change in our lives. In that case we have to organize our own power with others first in order to make a claim on the resources or decisions that will fulfill our interests.

Changing 'Power Over'

When we have to engage those who have power over us in order to create change, we ask ourselves five questions:

1. What change do we want?
2. Who has the resources to make that change?
3. What do they want?
4. What resources do we have that they want or need?
5. How could we organize those resources to give us enough leverage to get what we want?

Once we have answered these questions, we're one step closer to deciding on our strategic goal.

Who are the actors involved? What are their interests?

In organizing we mobilize people, not issues. Our teams are made up of the leaders who are central to our work, whose leadership we develop. Our constituencies are the people who are teams mobilize, and to whom we are accountable.

Who are we organizing? Individual citizens? Faith-based organizations? Aging services? Elderly? Family/Care Givers? Are we targeting particular subgroups, such as mothers living in a particular community? Nurse practitioners? How many will we target? Where are they located? How can we reach them?

Our strategy will ultimately be about how to influence the choices made by these potential allies, supporters, competition, and opposition. Imagining them on a map quite literally helps us "map" the values, interests, and resources at play. Who are they? By name? By organization? By subgroup? What do they value? What interests do we share? What interests conflict with ours? What resources do they have that we want? What challenges do they face? What resources do we have that they might want? Why might they join us?
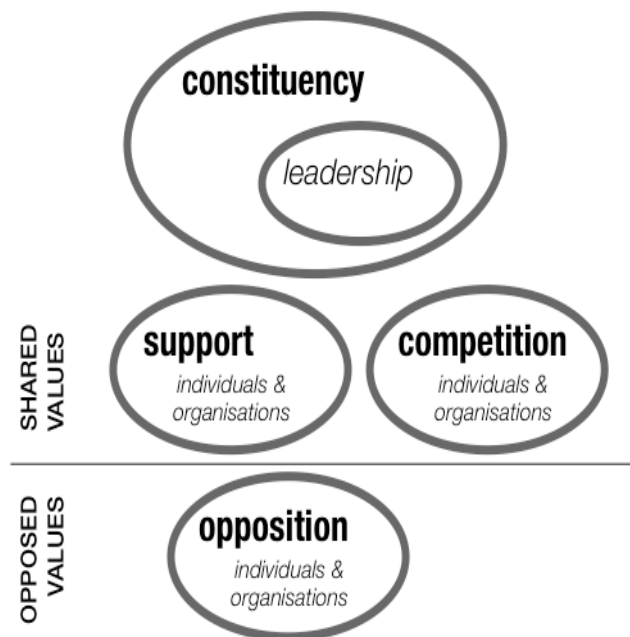
Constituency. Constituents are people who have a need to organize, who can contribute leadership, can commit resources, and can become a new source of power. An organizer's job is to turn a community – people who share common values or interests – into a constituency – people who have committed to act on behalf of those values or interests.

Leadership. Although your constituency is the focus of your work, your goal as an organizer is to draw upon leadership from within that constituency. The work of these leaders, like your own, is to accept responsibility for enabling others to make change. They are accountable to their constituency, represent the constituency to others, and support members of the constituency in achieving shared goals, together.

Opposition. In pursuing our goals, we may find ourselves in conflict with the values and interests of other individuals or organizations. How are you going to anticipate this opposition and design the campaign to overcome it?

Supporters. There will be people whose interests are not directly or obviously affected by the campaign but who may find it in their interest to support it. For instance, other initiatives in your community or state may have interests aligned with the campaign and agree to provide resources.

Competition. There will be individuals and organizations with whom we share interests and values, but not agree on tactics and therefore they compete with us for resources. For example, they may target the same constituency, or they may seek the same sources of support. They may face the same opposition but have a different vision and measurable outcome for their work. Another program may compete with you for the time and commitment of citizens. How can you turn your competition into your supporters or your constituency?

Our map of actors is not static. As you develop your strategy, consider how you will build capacity by turning supporters into allies and competitors into supporters. Is there a basis for developing an exchange of resources so you can make a commitment to one another? Does your map reveal anything new about whom you should recruit?

Who are you mobilizing? Who are the leaders within this community? What resources can this community use or develop in order to achieve your goal? Who are your allies, competition, and opposition? What are their interests? Do they have resources that you need? Do they have resources that will hamper your efforts to achieve your goal? What opportunities are there for exchanges of resources and interests? How will you build/maintain relationships?

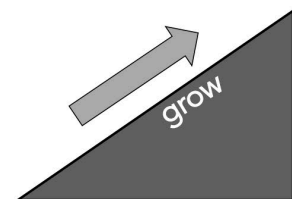## What are the resources that we can draw on in our constituency?

Strategy is based on the resources of our constituency. What unique resources do our constituencies have?
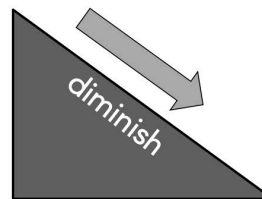
Economic resources *diminish* with use
• money
• materials
• technology

Natural resources *grow* with use
• relationships
• commitment
• discretionary effort

As you develop your strategy and tactics, take time to make an inventory of the resources that your constituency has access to – either directly or indirectly. Drawing on constituency resources empowers the constituency to change power dynamics that created the problem in the first place.

- What resources are available to you in this room today?

- To what resources does your constituency have unique access? Time? Knowledge? Expertise? Credibility? Moral authority?

- What additional resources do you need? Who has access to them?

Challenging the status quo requires making up for your lack of resources by intentionally using the resources you do have. Developing a successful strategy, therefore, will require creativity and flexibility. You will constantly test your theory by trying new tactics, evaluating them, and improving them over time.

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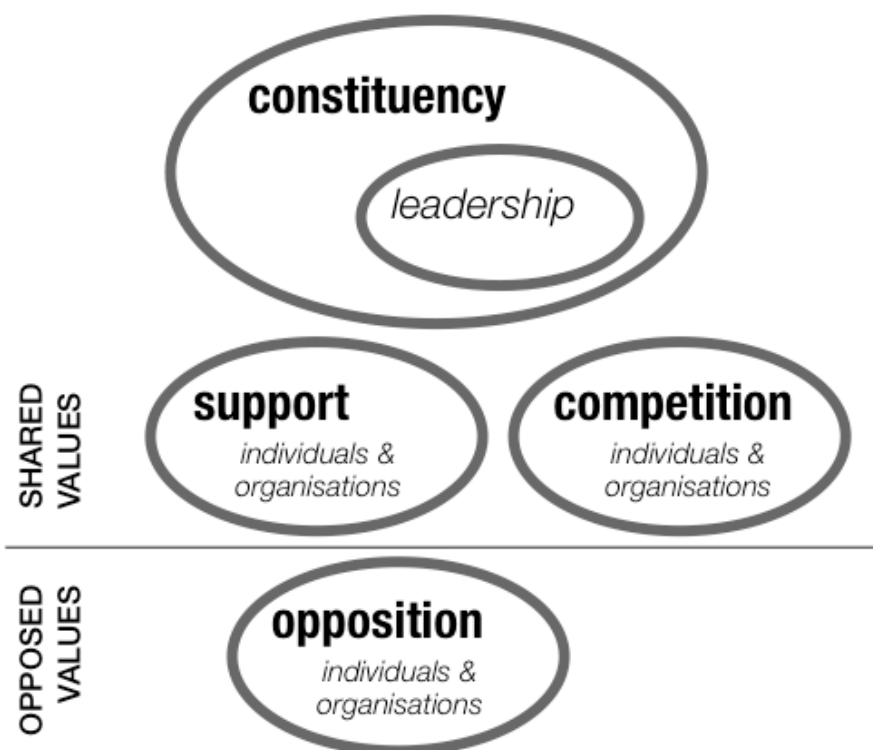# PRACTICE ACTIVITY #5: **Mapping Actors & Assets**

TIME: 30m
GOALS:
- ☐ Begin your Map of Actors showing stakeholders, resources, and power dynamics
- ☐ Begin building your list of people you want to have a 1:1 with

AGENDA:

1.	Gather with your community table partners. Listen to the trainer's guidance for this activity	
2.	Use the butcher paper/Flip Charts, and stickies to build your map ▪ Start putting the names of organizations, types of organizations, and/or specific people on sticky notes – one name/org per sticky note, listing the assets/ resources they bring to the table: ▪ Place the sticky notes on the Flip Charts in the appropriate categories (see diagram below). You may need to duplicate and put someone in more than one category.	30m
3.	Begin a list of people/organizations you may want to have a 1:1 with	throughout
4.	Rejoin the big group for Debrief	

Constituency

Leadership

Support / Allies

Competition

Opposition

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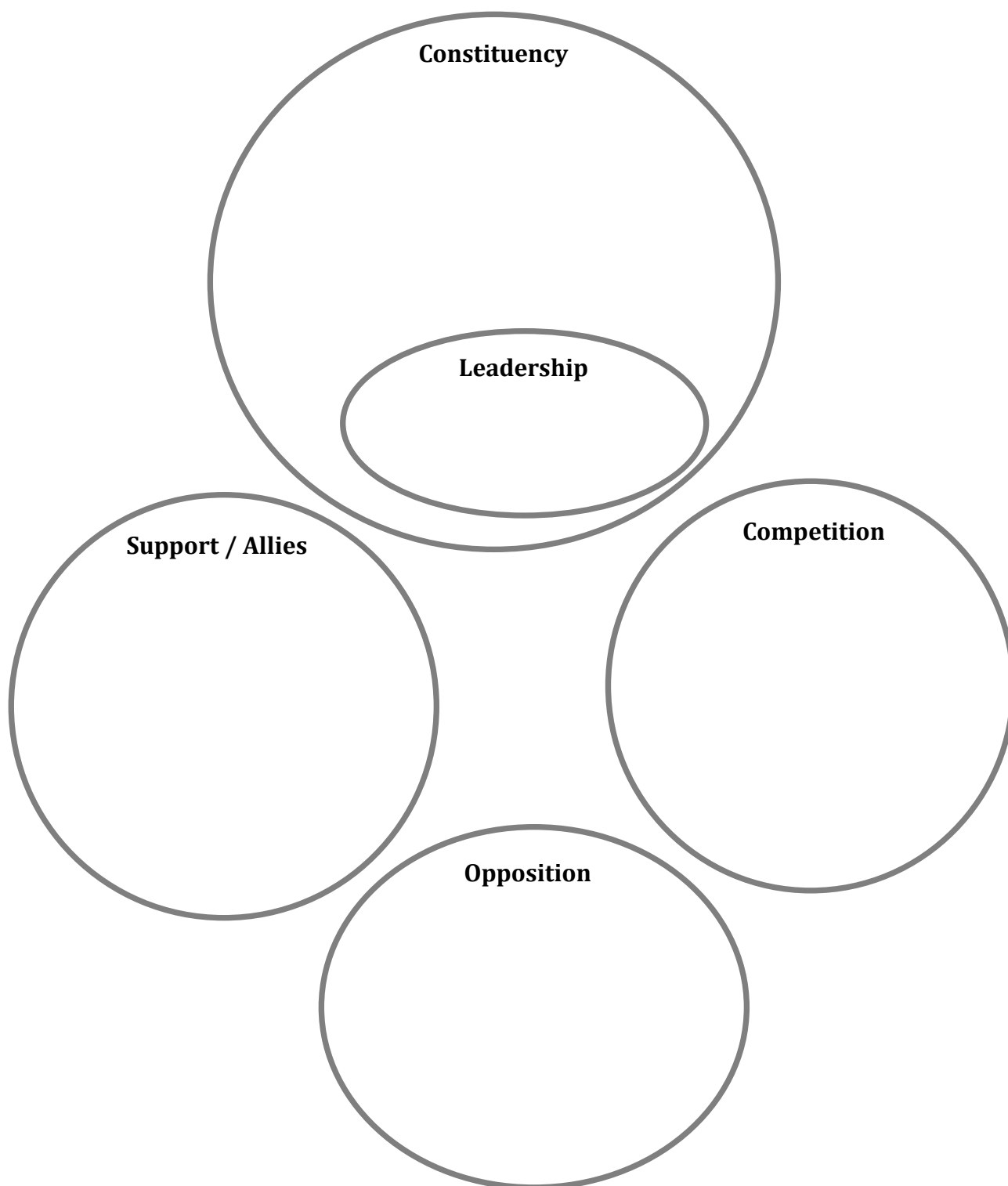
Who should we recruit?

There is a tendency to think of leaders as the people who speak for a group, from behind a microphone, or the people who run institutions. But those are just the most visible forms of leadership. When recruiting leaders for organizing, look for other resources that a person brings.

- ***The best people to recruit are those who can bring others along***. Power is rooted in the relationships. People who can bring others to the table are rooted in one or more of the constituencies you want to organize. You may choose to recruit individuals who can bring along other *individuals* or *informal networks* because of their deep networks of relationships in a community. You may look for people who can bring *organizations* along.

- ***Look for people with good relational skills****.* They should be good listeners, not just good talkers, and able to relate to a wide variety of people. ***Good leaders believe in people***. They encourage them, respect them, and help them develop their own leadership skills.

- ***Look for people who are clear about their values and have a positive outlook toward tackling challenges.*** Be careful about naysayers, as they can dampen the spirits of others.

- ***Seek out those with a history of collaboration***. Leaders need to be able to put their personal agendas and organizational identities aside and work for the good of the whole. One way to know if they can do that is to find out if they've done it before. Pay attention to whether they have been part of other group efforts – perhaps at church, work, or school, or in a larger, more complex collaborative.

- ***Look for people who will share leadership with others***. Again, probe to see if they've done it before. Pastors, physicians, and other traditional authority figures often lack experience in sharing leadership and may fall back on top-down models to get things done. Those who have been part of voluntary organizations, may have valuable experience in sharing responsibility. Organizing depends on shared leadership and responsibility. This has to be modeled from the top.

- ***Look for passion and commitment to the cause***. Passion and commitment are central to motivating others and providing effective leadership in the face of uncertainty.

- ***Look for those who build consensus and accept compromise***. Watch out for overly zealous people who don't listen and can't accept constraints. The ability to compromise is critical to team success.

- ***Look for people with resources***– relationships, knowledge, moral, and financial resources. For "knowledge resources," look for people with an understanding of the problem you are trying to solve. For "moral resources," look to people who have widespread respect in their communities or among co-workers. For "relational resources, "look for people who can bring others along with them or whose relationships can create political space for the campaign.

- ***Find people with a learning orientation, who are willing to take risks, learn from others and work outside their comfort zone.*** If the problem could be solved through conventional approaches, it would have been solved by now.

Building Relationships
Shared Commitment

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- Power comes from our commitment to work together to achieve common purpose, and commitment is developed through relationships.
- The 1:1 meeting is a key tool for establishing and maintaining relationships,
- Those whom we already know and/or are "like us" are called "strong ties"; people from different backgrounds and experience are called "weak ties"; connecting with 'weak ties' build diversity and innovation.
- A "hard ask" is an effective way to ask for a commitment to establish a relationship.
- Recruitment and retention best practices can significantly increase the rate at which new people join and stay on your team.

"Organizing is a fancy word for relationship-building."
~ Mary Beth Rogers

BUILDING POWER IN RELATIONSHIPS

Goals for this Section:

- ☐ To understand why we build relationships in organizing
- ☐ To identify common values, interests, and resources among the community
- ☐ To learn how to conduct a 1:1 meeting and practice

Why build relationships?

Again, we define organizing as leadership that enables people to turn the resources they have into the power they need to make the change they want. Power comes from our commitment to work together to achieve common purpose, and commitment is developed through relationships.

Relationships are rooted in shared values. We can identify values that we share by learning each other's stories, especially 'choice points' in a life journey. The key is asking "why."

Relationships are long term. Organizing relationships are not just transactional. We're not simply looking for someone to meet our "ask" at the end of a one-to-one meeting or house meeting. We're looking for leaders to join with us in long-term relationships of learning, growth and action.

Relationships are created by mutual commitment. An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time. A commitment of time to the relationship gives it a future and, therefore, a past. And because we can all learn, grow, and change, the purposes that led us to form the relationship may change as well, offering possibilities for enriched exchange. In fact, the relationship itself may become a valued resource – what Robert Putnam calls "social capital."

Relationships involve consistent attention and work. When nurtured over time, relationships sustain motivation and inspiration and become an important source of continual learning and development for the individuals and communities that make up your organizing campaigns.
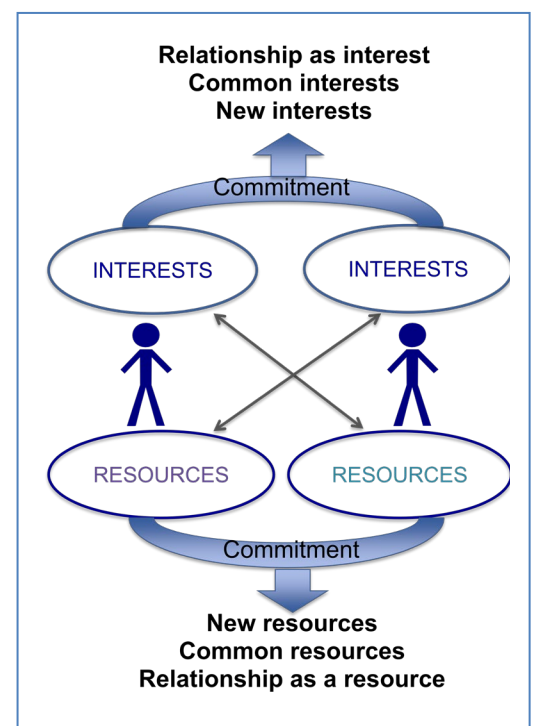
Sometimes simply knowing that we are not fighting alone gives us the energy to continue the work. For example, the relationship between Cesar Chavez and his mentor, Fred Ross, Sr. was a long-term relationship built through one-to-ones and shared action. Their relationship helped spawn the farm workers' movement and provided a source of learning and growth, not just for them as individuals, but also for the movement.

Strong and Weak Ties

With whom should we be developing relationships to engage in our campaign?
Our tendency is to work with the colleagues and friends we already have, in the networks we already know about. And that's a very good idea—it's how everyone starts. But you can make whatever action or campaign you're planning far more effective if you work hard to reach out to people you don't already know. This sounds like common sense, but it doesn't happen often enough.

We all share relationships with some people or at least we share a common culture or a common set of relationships. These relationships might be embedded in the teams or organizations we come from, our professional backgrounds, our communities, families, or faith groups. Very often these are the people that we

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turn to first – people like us, whom we already know. We call these "**strong ties**." They can be a source of strength, but they may also create a closed in, limited circle of people and resources.

For this reason, we may also need to think about building relationships with people from different organizations or professional backgrounds or people who are socially and culturally more distant from us. We call these people "**weak ties**." Such people can bring resources and skills (including contacts), but also add diversity and innovation capacity to your team.

Look for shared passions
When we need help with something, we turn first to our friends, then to a wider circle of people who are still within our comfort zone. Sometimes they are friends of friends, but sometimes it's the people who share our associations, our passions. But it's important to include people who share your vision for a better world but may arrive there by different channels. While it's understandable to feel shy with strangers, there's also much to be gained from reaching out.

Ask for help early
Whenever you ask people to participate, it holds more meaning when they have had some say in how the event unfolds. The earlier you pull people into the decision-making, the more likely it is that they will become a new ally to work with in the future.

Think like a fellowship
Diverse collaborations work better as a loose group than as a hierarchy of leaders. If nothing else, that diffuses any issues about whether one organisation is more in control of an action than another, since at least some of the people involved will probably represent an institution in your community.

When inviting people to participate, ask them to be your fellow organisers, not members of *your* group. Share responsibility. You'll also be more likely to pull in people who will pitch in because they want to rather than because you asked them for help.

Go local
After you have your list of fellow-thinking groups, you may still want to look for ways to get more people involved in what you're planning. Find the other groups in your community who have regular meetings. Maybe it's a volunteer group, maybe it's a special interest group, maybe it's a seniors' group.

The group should have a goal that doesn't conflict with what you're doing and an infrastructure with a track record of success. That way, not only will you connect with people who are active in your community and have an established network in place, but you get to extend the reach of the campaign by contacting a group less tied with it already.

Make it personal
You can find interested people by talking to people in your workplace, making announcements at meetings of related groups, or putting up posters in key places with meeting information. By far the best way to get somebody to come to a meeting is to ask them personally: a one-to-one conversation is more effective than a group email or putting up lots of posters (though those help, too).

Unlikely allies
Reach out to the usual suspects to get involved – but also think of other organisations or groups in your community that may want to get involved. They'll bring new people into the process, and new and valuable perspectives. Attend meetings of other groups you think might want to get involved. See if there is anything you can help them with and be sure to announce to everybody how they can get involved in your local campaign.

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Do Easy Favors Easily

Look for easy ways to help the people who help you. If you ask a local group to donate help towards your launch activity and they ask for something easy in return - like publicity/promotion - give it. For example, you might ask a group to help spread the word to their members. They might say yes, but on the condition that you put their logo on your website, the kind of thing that helps them and doesn't hurt you. Say yes, and fast! In fact, don't even wait for them to ask. Offer it to them first. Doing favors is also a good way to quell tensions. If you have created a webpage for your group/action, it may have a blog or other venue for writing under a byline. When that person - we all know one - insists on making a political speech during your logistics meeting, ask them to write an article about it so that everyone can have the opportunity to hear and consider the point. The chance to be heard in public will often be enough to get everyone back to work on the tasks at hand.

1:1 Meetings

One of the best ways to initiate intentional relationships is by use of the one-to-one meeting, a technique developed and refined by organizers over many years. A one-to-one meeting consists of five steps or "acts":

1. Attention – We have to get another person's attention to conduct a one-to-one meeting. Don't be "coy." Be as up front as you can be about what your interest is in the meeting, but that first, you'd like to take a few moments to get acquainted.

2. Interest – There must be a purpose or a goal in setting up a one-to-one meeting. It could range from, "I'm starting a new call to action and thought you might be interested" to "I'm struggling with a problem, and I think you could help" or "I know you have an interest in X so I'd like to discuss that with you."

Relationship Building
Attention
Interest
Exploration (ask-answer)
Exchange
Commitment

3. Exploration – Most of the one to one is devoted to exploration by asking probing questions to learn the other person's values, interests, and resources and by sharing enough of your own values, interests, and resources that it can be a two-way street.

4. Exchange – We exchange resources in the meeting such as information, support, and insight. This creates the foundation for future exchanges.

5. Commitment – A successful one to one meeting ends with a commitment, most likely to meet again. By scheduling a specific time for this meeting, you make it a real commitment. The goal of the one to one is not so much to get someone to make a pledge to join your call to action as it is to commit to continuing the relationship.
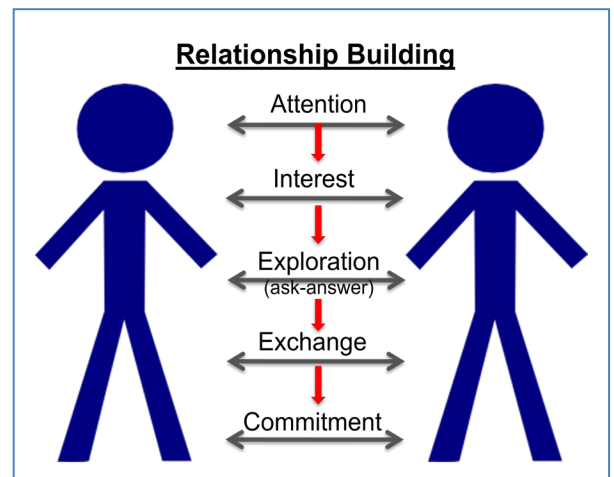
D O	D O N ' T
Schedule a time to have this conversation (usually 30 to 60 minutes)	Be unclear about purpose and length of conversation
Plan to listen about 80% of the time	Try to persuade rather than listen
Follow the steps of the conversation above	Chit chat about private interests
Share experiences and deep motivations	Skip stories to "get to the point"
Share a vision that articulates a shared set of interests for change	Miss the opportunity to share ideas about how things can change
Be clear about the 'when and what' of your next step together.	End the conversation without a clear plan for the next steps.

Further Reading
Gladwell, M. (2009). Six Degrees of Lois Weisberg

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# PRACTICE ACTIVITY #6: **One-to-One Meeting**

TIME: 10-20m
GOALS:
- Practice initiating/leading a 1:1 meeting using the steps outlined below
- Craft a 'hard ask' – a clear, specific call to action
- Practice delivering a 'hard ask'/specific call to action

AGENDA

1.	Practice a 1:1 by initiating or accepting an invitation with someone in your small group	~10m
	▪ Use the steps outlined below to conduct a 1:1 meeting with your partner	
	▪ Make it as real as possible	
2.	Rotate with the person to your left and practice with the opposite role you had in the first round, i.e. if you were the 'invitee' during the first round, you'll be the initiator during this round and vice versa.	~10m
3.	Gather back into the big group for debrief	
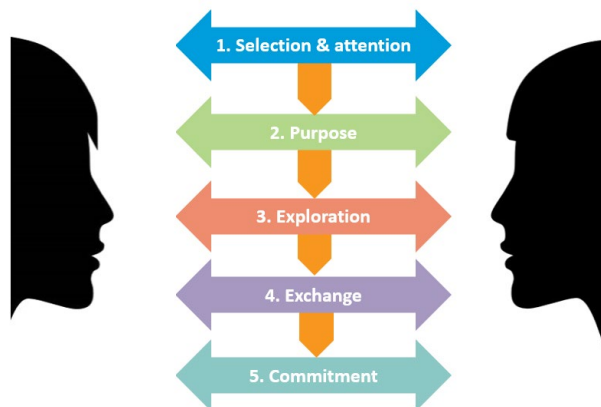
1) Let the person know why you chose them specifically to speak with
2) Describe your **interest** and purpose in the conversation
3) **Explore** values and interests
4) **Exchange** resources, insights, and ideas; and
5) Seek a **commitment**.

Step #1 – Get the person's attention. This will already have occurred when you start this exercise.

Step #2 – Describe your interest and purpose in the conversation. First, confirm that the person has 10-12 minutes of time for the meeting, so you are clear from the start on when you need to end. Be honest and clear about your reason for the meeting. For example, "I am working on a project to secure funding for services that assist us as we age. I'd like to find out about your interests, tell you a little bit about our efforts, and see if you'd be interested in playing a role."

Step #3 – Explore and Probe. Learn about the other person's **values, interests** and **resources** and be prepared to talk about yourself. Probe with "why?" questions to get to choice points and specific experiences that shaped his or her life. Share your story. Listen to your partner's story for the motivations and the resources he/she might bring to the effort (particular leadership skills, a particular network, specific action skills, etc.). *Be specific. Avoid talking about issues in an abstract way* — get to the lived experience of why you care about the specifics that you want to do something about.

Step #4: **Seek a commitment**. Make it specific and clear.

BY THE END OF YOUR 1:1, MAKE SURE YOU CAN ANSWER THESE 4 QUESTIONS:
(1) What **values** do we share?
(2) What **common motivating interests** do you have?
(3) What **skills and resources** do we each bring to this work?
(4) What **specific commitments** did you make to each other?
(5) When will we **meet again** and/or **what will we do next** to take action and to keep building this relationship?

Use this space to record important information from your 1:1

Our Common Values	Our Shared Interests	Our Unique Resources	Our Specific Commitment

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Measures, Tactics & Timeline
Shared Strategy & Action

LEAD! LOA Community Organizing Training Workshop : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- We devise strategy by asking first, "who are our people and what is their problem?" before deciding on our peak goals.
- Strategy is made up of "nested goals": smaller, measurable goals that we achieve incrementally in order to meet our larger, ultimate goal.
- A "theory of change" statement summarizes our strategy, and provides us with a strategic blueprint for how we plan on making change
- For a tactic to be effective, it should be strategic, strengthen your organization, and develop individuals.
- To effectively engage our people in action, we need their commitment and to use
- motivational engagement.
- An organizing statement summarizes your campaign and provides clarity on your people, strategy, tactics, and timeline.

Strategy without tactics is just a bunch of nice ideas.
Tactics without strategy are a waste of resources.

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Goals for this Section:

☐ To understand strategy in organizing
☐ To learn to develop creative, dynamic strategy with your team
☐ To learn to design measurable goals that account for building capacity, achieving aims, and developing leadership

In your story of now, you articulated an urgent challenge as well as a source of hope. Now, your task is to draw on that hope to design action that can move you closer to your motivating vision.

What is Strategy?

Simply put, strategy is turning what you have into what you need to get what you want.
▪ What you have is your constituency's resources: people, time, skills, money, experiences, relationships, credibility, your allies, supporters, your leadership.
▪ What you need to achieve the change you want is power. Power is gained through tactics that can creatively turn your resources into the capacity you need to achieve your goal.
▪ What you want is your goal. Your goal is a clear and measurable outcome that allows you to measure progress along the way.

To illustrate strategy, we will use a classic organizing example: the 1956 boycott of the bus system in Montgomery, Alabama. In 1956, as part of regional racial segregation policies, African-American or black passengers had to sit at the back of the bus, and white passengers at the front. If the bus was full, black passengers were forced to give up their seats for white passengers. Demanding a change to these rules, black passengers boycotted the bus system, depriving the system of substantial revenue. 381 days after the boycott started, the bus system was desegregated.5

Strategy is motivated
We strategize in response to an urgent challenge, a unique opportunity, to turn our vision into specific goals. We commit to the goal first, then develop how we will get there. Think of the Montgomery Bus Boycott - *what challenge did the leadership of the boycott respond to? What was their motivating vision?*

Strategy is intentional
Strategy is a theory of how we can turn what we have (*resources*) into what we need (*power*) to get what we want (*achieving goals*). It is a hypothesis about how we can use certain tactics to achieve specific goals. *What clear goal was Martin Luther King and the boycott leadership trying to achieve? How is that distinct from their overall vision? What clear, specific goals are we trying to achieve?*

Strategy is creative
Challenging the status quo requires making up for our lack of resources by using the resources we do have intentionally, enabling creative resourcefulness. In the bus boycott the leadership turned the resources of their constituency (a simple bus fare) into power by mobilizing that resource collectively. Remember, power is nearly always dependent on the participation of the powerless. Disrupting that participation can get the attention of decision makers and shift the balance of power.

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Strategy is a verb and a dynamic process

Strategy is something we do, not a noun (something we have). Strategizing is not about creating a "strategic plan" at the beginning of a campaign and implementing it. Rather, it is about constantly making opportunistic, but mindful, choices with regards to challenges and opportunities that emerge along the way – always with intentionality with respect to our goals.

Action is at the heart of strategizing. As Hirschhorn and May put it, we "act your way into new thinking" rather than "think our way into new acting." As leaders, we commit ourselves and our resources to the course of action we believe likely to yield a desired outcome. At the same time, as we take action to move towards our goal, we remain ready to adapt to new opportunities and to learn from our successes and failures. Strategic action is not a single event, but a process or a loop continuing throughout the life of a project. We plan, we act, we evaluate the results of our action, we plan some more, we act further, etc. If we learn that our tactics aren't helping us move closer to our goal, we devise new ones – firmness of goals and flexibility of means. Constructively managing the tension between commitment to a course of action and adaptation is one of the primary responsibilities of strategic leadership.

Strategy is collaborative

Strategy is most dynamic when the group responsible for strategy brings diverse experience, background, and resources to the table. *Who is responsible for strategizing in your area of focus? How can you increase the diversity (and in turn the capacity) of this group to strategize creatively?*

- Does the strategy team deliberate well? (*Is there clear space created for open, creative brainstorming as part of the strategy process before decisions are made?*)
- Can the strategy team move quickly*? (Is there a norm for making decisions in a way that includes everyone and also responds to the urgency of time?)*

How to strategize

When strategizing, we ask ourselves three questions:
1. Who are our PEOPLE?
2. What is the PROBLEM?
3. What is our GOAL?

Step 1: Who are my people?

When strategizing, there are different distinct groups we need to consider: our constituency, and within it our leadership, our supporters, our competitors, and our opposition. Revisit your Map of Actors and Assets and see Shared Commitment Part I: Mapping Actors and Assets section.

Step 2: What is the problem?

Now we need to analyze the problem by asking three questions: What exactly is the problem we're trying to solve? Why hasn't it been solved? And what would it take to solve the problem?

What is the problem?

What is the problem facing our people? To be most effective as an organizer, you should seek to enable your constituency to change an intolerable circumstance. In the Montgomery Bus Boycott example, the people were black residents of Montgomery, and their intolerable circumstance was a system of racist segregation policies.

Why hasn't the problem been solved?

Who has the resources to solve the problem? Why haven't they used them to solve the problem? Do we know how to solve it, but just lack the necessary resources? Or do we need to first figure out how to solve the problem?

It's important to look at the history of this problem to understand what has been tried (if anything), what failed, and why.

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What would it take to solve the problem?

To determine how we will solve the problem, we develop a "theory of change." A theory of change sums up how what we do will result in the change that we want. In community organizing, the theory of change is based on power relationships, and in this context, power is not something that you have by virtue of the position you hold in an organization. Instead, organizers understand power as the influence created by the relationship between interests and resources.

We assume that the world is the way it is because some people benefit. We also assume that these people currently have more power than us and are therefore able to maintain the status quo. Community organizing, then, focuses on power: who has it, who does not, and how to build enough of it to shift the power relationship. That shift is what makes change.

In organizing, we conceptualize two kinds of power: "power with" and "power over." Understanding which type of power is involved in the problem we are facing helps us decide how to approach the problem.

Power with: Sometimes we can create the change we need just by organizing our resources with others, creating power with them. All organizing involves power with. For instance, creating a community credit union or a community run day care are examples of 'power with' community organizing.

Power over: Sometimes others hold power over decisions or resources that we need in order to create change in our lives. In cases like these, we have to organize our power with others first in order to make a claim on the resources or decisions that will fulfill our interests.

When we have to engage those who have power over us in order to create change, we ask ourselves five questions:
1. What change do we want?
2. Who has the resources to make that change?
3. What do they want?
4. What resources do we have that they want or need?
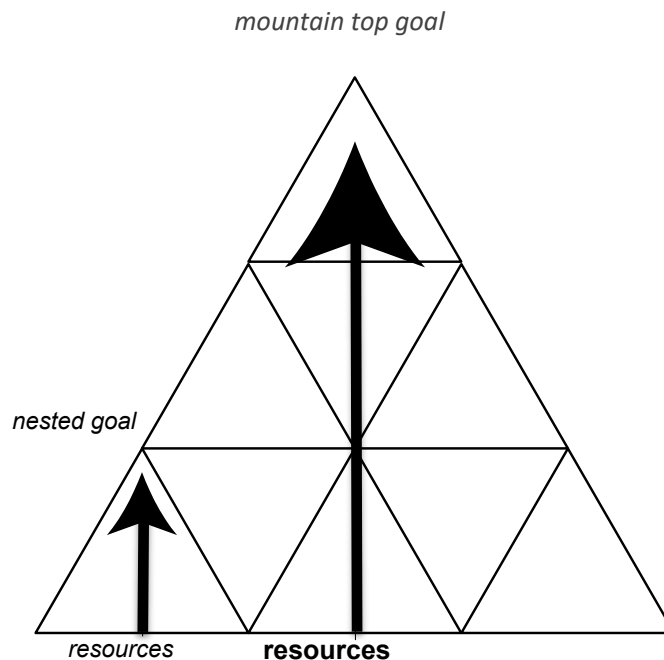5. How could we organize those resources to give us enough leverage to get what we want?

Once we have answered these questions, we're one step closer to deciding on our strategic goal.

Step 3: What's the goal?

A strategic goal should be **clear and measurable**. Choosing your strategic goal is the most important choice we make in designing a campaign.

No one strategic goal can solve everything. In order to put our resources to work solving our problems, we have to decide where to focus. We must ask ourselves: what goal can we work toward that may not solve the whole problem, but will get us well on the way to solving the problem? Unless we choose a goal to focus on, we'll risk wasting our precious resources in ways that just won't add up.

Remember, strategy is nested; a campaign's ultimate goal, or the "mountain top" goal, is likely not achievable in one attempt (see diagram 12). Instead of chasing after the mountain top goal all the time, we can set smaller, nested goals that help measure incremental progress throughout the campaign. Nested goals may take place over time (e.g., a local campaign for a municipal living wage policy may start with electing supportive council candidates before moving on to pushing for an actual bylaw), or over a geographic area (e.g., a provincial election in British Columbia may have up to 85 nested goals, one for each provincial riding a party or group wishes to influence).

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mountain top goal

nested goal

resources **resources**

An effective strategic goal:
1. Is **measurable**, ideally as a number with units (e.g., people, votes, dollars, hours, etc.).
2. **Focuses resources** on a single strategic outcome.
3. **Builds the capacity** of our constituency.
4. **Uses a point of leverage**: our constituency's strength or our opposition's weakness.
5. Focuses on a **motivational issue** that is visible and significant to our constituency.
6. Can be **replicated or emulated**.

Theory of Change

Once you have an understanding of the type of power you need to build and have a measurable strategic goal in mind, you can develop your theory of change, which summarizes your strategy.

A theory of change statement is a tool to understand your strategy and how (or if) it will work. Being able to articulate a clear theory of change statement is a prerequisite to an effective campaign. To put it bluntly, if you can't write your strategy out in a sentence that makes sense, then it probably won't work.
A theory of change statement uses this format:

> If we do (TACTICS)
> then (STRATEGIC GOAL or CHANGE)
> Because (REASON)

In the Montgomery Bus Boycott example from earlier in this section, the theory of change could be written like this:

> If *African Americans in Montgomery boycott the bus system*
> then *the bus company will desegregate the buses*
> because *the decrease in ridership will significantly impact their profits.*

In a Canadian federal election, a partisan theory of change might read like this:

> If *we turn out 6.2 million votes nationwide (~40%)*
> then *we will win a majority government*
> because *that will provide us with a plurality of*
> *votes in over 170 ridings needed to win.*

Theory of change statements should be clear for both the big and small picture (e.g., large scale on a national level, or small scale at the local level in electoral organizing). A single campaign may have many local theories of change nested within a broader campaign.

What might your theories of change look like?

If we do (TACTICS)

then (STRATEGIC GOAL or CHANGE)

Because (REASON)

In closing, strategy is simply turning what you have into what you need to get what you want. Thinking through – who are our people? what is our problem? and what is our goal? - and formulating a theory of change – your strategic blueprint for how you plan on making change – is critical to effective community organizing.

ACTION: TACTICS & TIMELINE

Tactics: Strategy in Action

We act to put our strategy into practice, and we do this by implementing tactics. Just as it's important to devise effective strategic goals, it's important to choose the most effective tactics to meet those goals. Your effort will quickly run into challenges if you use tactics that fail to move you towards your strategic goal. Similarly, if you spend all your time strategizing without putting it into practice via tactics – and thereby learning how to implement tactics skillfully and effectively – you will have wasted your time.

The "Sweet Spot"

A tactic is most effective when it meets these three criteria:
1. **Strategic**: it results in concrete, measurable progress toward your campaign goals.
2. **Strengthens your organization**: it attracts and engages new people; it increases your community's capacity to work together to make change.
3. **Develops individuals**: it builds the leadership, skills, and capacity of your constituency.

When choosing tactics to implement your strategy, you're aiming for the "**sweet spot**" (see diagram) where all three of the above criteria overlap.
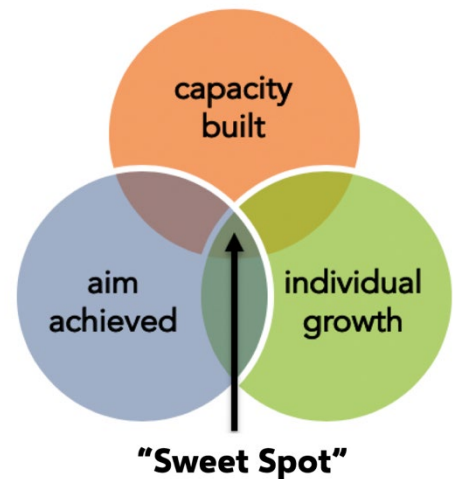
Commitment and Motivational Engagement

There are two central components to engaging people in effective action: commitment and motivational engagement.

First, action requires that leaders engage others in making explicit commitments to achieve specific, measurable outcomes. We know that we cannot achieve our goals on our own, so we need others to join us.

Second, to successfully engage others in a way that expands rather than depletes our resources, we need to design action mindfully through motivational engagement. Once we have secured commitment from others to join us in action, it is important that they have a meaningful experience when they join us. If people don't feel like what they are doing is important, or they do not grow and learn as they act, then they are unlikely to say yes the next time we ask for a commitment.

There are three characteristics of a motivational action:
1. Meaningful: the person can see that the action is significant and makes a difference towards achieving a meaningful goal.
2. Autonomy: people are given levels of responsibility according to their skills and abilities to achieve a particular outcome.
3. Feedback and Learning: People can see the progress of their work, measure success, and receive coaching and support from more experienced leaders so they can learn and grow.

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These three characteristics lead to greater motivation, higher quality work, and greater commitment. In designing and delegating action steps, then, the key is to commit people to engage in ways that facilitate such experiences.

In addition, there are five assessment criteria that serve as guidelines for designing motivational action:
- Task Identity – Do participants get to do the whole thing from start to finish?
- Task Significance – Do participants understand and see the direct impact of the work?
- Skill Variety – Do participants engage in a variety of skills, including "head, heart, and hands" (or strategic, motivational, and skills tasks)?
- Autonomy – Do participants have the space to make competent choices about how to work?
- Feedback – Are results visible to the person performing the task, even as they perform it?

The more we ask people to commit to actions that meet these five criteria, the more likely people are to commit and continue taking action. Nearly any action can be redesigned to provide a more meaningful experience that supports individual creativity and growth while achieving the campaign's goals.

The Campaign Timeline

The rhythm of organizing is the campaign: coordinated bursts of activity focused on achieving specific goals. Campaigns unfold over time with a rhythm that slowly builds a foundation, gathers gradual momentum with preliminary peaks, culminates in a climax when a campaign is won or lost, and then achieves resolution.

In organizing, we assume that we begin a campaign with far fewer resources than we will need to tip the balance of power and achieve our goal. Growing our capacity (people, money, skills, etc.) is critical for success. This capacity-building is what builds momentum. Like a snowball, each success contributes resources, which makes the next success more achievable. As we map our campaign, we identify milestones for when we will have created enough new capacity and developed enough power to undertake activities that we couldn't before. Read on for more details of what happens during each step of a typical campaign timeline.

Foundation

During the foundation period, the goal is to create the capacity (or the "power with,") needed to launch a campaign. A foundation period may last a few days, weeks, months, or years, depending on the scope of the undertaking and the extent to which you start 'from scratch.'

Organizers prioritize relationship-building during the foundational period. This typically includes 1:1

meetings, house meetings, and meetings of small groups of supporters. You want to build as broad a base as possible while not letting things heat up too quickly. This is a crucial period for leadership development.
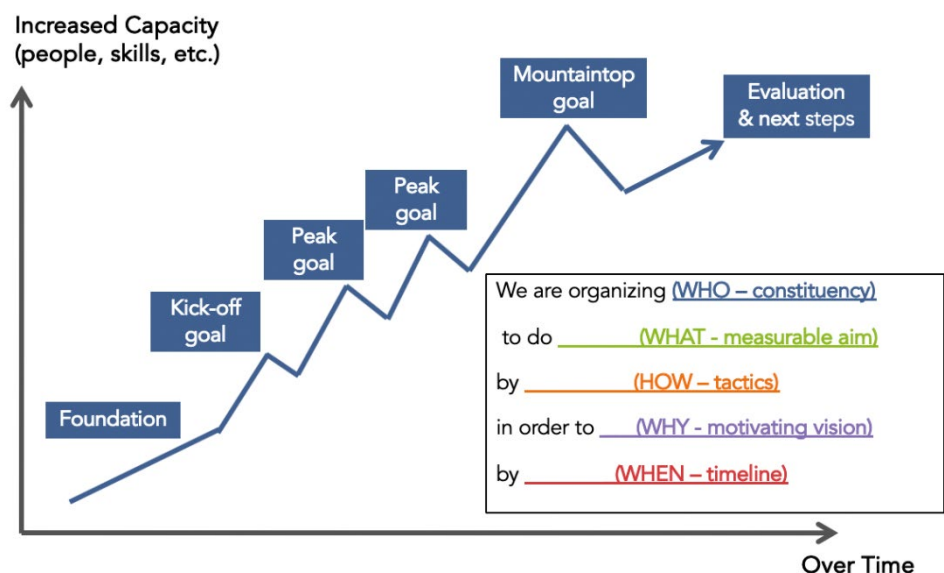
Kick-Off

The kick-off is the moment at which the campaign officially begins. Setting a date for a kick-off creates urgency and focuses the concentration and commitment it takes to get things going. The kick-off becomes a deadline for initial recruiting, planning, and preparation of materials. Typically, a kick-off takes the form of a big meeting or rally around which everyone is mobilized. Leadership can be recognized there, the campaign story told, the plan ratified, and the program adopted. In terms of action, sign-ups can be gathered, and commitments can be made to hold a meeting, make phone calls, or pass out leaflets, and so forth.

Note that for organizers, the primary purpose of a kick-off isn't to create a media event, but to bring in new people and establish commitment to the campaign. A kick-off is also a deadline for the formal delegation of leadership roles to those who will be responsible for carrying out the campaign.

Peaks

The campaign proceeds toward a series of peaks, each one building on what has come before. By crossing the threshold of each peak, we break through to the higher level of capacity needed to reach our next target. Each peak should have a measurable goal (e.g., number of people at a rally, number of signatures on a petition, number of organizations pledging support, etc.) that launch you forward towards your next peak. This way, you can measure success and make adjustments accordingly based on observable data.

The "mountain top" peak

The campaign "mountain top" peak comes at the moment of maximum mobilization. Beware of peaking too early – often, campaigns accidentally peak at the kick-off. Your goal as an organizer is to have your campaign capacity reach its peak at the time when it is needed most. In some cases, the timing of this peak is predictable (e.g., in an election campaign). In other cases, those who lead the campaign can designate the peak. In still other cases, the mountain top emerges from the actions and reactions of all those playing roles in the campaign.

Evaluation and next steps

Campaigns are either won or lost. Only by risking failure do we make the kind of commitments that make success possible.

Resolving a campaign, however, means learning how to be successful at winning and losing. To succeed at winning, you must realize when you have won and learn to celebrate success. On the other hand, never claim a victory that's not yours or pretend a loss is a win. It robs the effort of its value. We need to acknowledge a loss as a loss, but contextualize the loss, interpret what happened, accept responsibility, recognize those who contributed, and prepare for what comes next.

Win or lose, a campaign should always conclude with evaluation, celebration, and preparation for next steps. When we win, we are sometimes so interested in celebrating, we forget to learn why we won, what we did right or wrong, and recognize those who contributed.

When we lose, even when we do evaluate, we may not celebrate the hard work, commitment, courage, and achievements of those involved in the campaign. The important thing about campaigns is there is indeed a 'next time' and it is important to prepare for it. Or, as many a Canucks fan has remarked, "Just wait 'til next season!"

Further Reading

Issenberg, S. (2012). *The Victory Lab: The secret science of winning campaigns.* New York, NY: Broadway Books, Crown Publishing.

Sharp, Gene (1973). 198 Methods of Nonviolent Action. *A Force More Powerful.* See http://www.aforcemorepowerful.org/resources/nonviolent/methods.php

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PRACTICE ACTIVITY #7: **Campaign Timeline**

TIME: ~35m

GOALS:
- ☐ Draft a clear, measurable Mountain Top Goal, and Peak Goals for your effort/campaign
- ☐ Learn to include capacity building into your construction of goals
- ☐ Think strategically with those in your group about your timeline, goals, and tactics

AGENDA:

1.	Review the agenda and tools (Campaign Timeline Template and/or Miro Board with your Small Group Coach	5m
2.	Listen for you Coach's prompts • Start with your Motivating Vision and your Mountain Top Goal from your Organizing Statement • Draft potential peak goals that both achieve aims AND build capacity and place them on the timeline; you can move them around or adjust as needed • Brainstorm tactics to meet your goals – *for future work: start noting the names of individuals and groups who have influence on your effort (or have the potential to influence). And list all the possible resources each actor brings to the effort (focusing mainly on the actors within your constituency, if you run short on time)* • Refer to the reading in this section for guidance or call on your Small Group Coach for help.	30m
3.	Rejoin the big group for debriefing	

WORKSHEET #9: Campaign Timeline

Increased Capacity (people, skills, etc.) ... **Over Time**

Foundation → Kick-off goal → Peak goal → Peak goal → Mountaintop goal → Evaluation & next steps

We are organizing (WHO – constituency)

to do _____ (WHAT - measurable aim)

by _____ (HOW – tactics)

in order to _____ (WHY - motivating vision)

by _____ (WHEN – timeline)

1. What measurable goal emerges from your motivating vision? Will this goal demonstrate that we are on our way to achieving a healthy community with access to low-cost, high-quality care for all?

Specify a measurable goal. Review ideas from the vision team and brainstorm additional options. How does it look from the mountain top?

- Who will be involved?
- What will they be doing?
- Where will the action take place?
- How will you measure your success?

2. On what resources can we draw?
To what specific resources do we have unique access (maybe ones that we give away without thinking about it every day)? What resources are in this room today? Consider the resources identified in your one-to-one meetings.

3. What tactics will we use turn these resources into power?
Brainstorm tactics that can help you achieve your goal. Be creative and bold! After brainstorming, evaluate the tactics according to the criteria below (and any other you would like to add); select the ones you believe will yield the desired outcome; then think about how you can make them more effective, resourceful, and liable to build capacity and develop leadership. *Hint: Strategy requires choosing – a laundry list of "what we are going to try" is not a strategy!*

- **Effectiveness**: will your tactics enable you to achieve your goal?
- **Resourcefulness**: do your tactics make creative use of your unique resources?
- **Capacity**: will your tactics enable you to build greater capacity in your organisation?
- **Leadership**: do your tactics create opportunities for leadership development?

4. What will be your timing, your peaks, your mountaintop peak?
Create a timeline that breaks down the overall goals into major peaks in such a way that each peak builds on what went before, culminating in your "mountaintop" peak. Make sure to include the key date and the benchmark goal you will have reached at each peak.

WORKSHEET #10: Tactics Planning Worksheet

Using the chart below, evaluate the tactics you have developed for your campaign according to the questions listed above. Use the rating in the first row to guide your analysis:

Tactic	Will it help you achieve your goal? *5= highly confident* *4 = confident* *3= limited confidence* *2= not sure* *1= need to rethink my tactic*	To what extent does the tactic draw upon the resources of your community? *5= great extent* *4= good extent* *3= limited extent* *2= little extent* *1=need to rethink my tactic*	Is the tactic designed to strengthen the capacity of the team? *5=highly confident* *4 = confident* *3= limited confidence* *2= not sure* *1= need to rethink my tactic*	Comment on what you need to adjust/improv or do differently next time
	Rating = Why?	Rating = Why?	Rating = Why?	
	Rating = Why?	Rating = Why?	Rating = Why?	
	Rating = Why?	Rating = Why?	Rating = Why?	
	Rating = Why?	Rating = Why?	Rating = Why?	

Creating Conditions for Effective Teams & Coalitions
Shared Structure

LEAD! LOA Community Organizing Training Workshop   : Building Shared Power, Shared Purpose & Collective Capacity

HTP Participants & Community Members

Risa Hayes, Meredith Koob, Telligen, Inc.
April & May 2023

Key Concepts:

- Teams are critical to organizing, in part because they deepen relationships that help us commit to action.
- Effective teams require shared purpose, interdependent roles, and explicit norms.
- The snowflake or interdependent leadership model is defined by mutual accountability and commitment, a sustainable number of relationships, clearly defined roles, and capacity for exponential growth.
- Interdependent leadership is an organizational structure that embodies leadership as that which enables others to achieve shared purpose in the face of uncertainty.
- The "ladder of engagement" can help us effectively and gradually guide a supporter into becoming a leader.

Without trust we don't truly collaborate; we merely coordinate or, at best, cooperate. It is trust that transforms a group of people into a team."
~Stephen M.R. Covey

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INTERDEPENDENT LEADERSHIP

Why Organize in Teams?

Once again, organizing is leadership that enables people to turn the resources they have into the power they need to make the change they want. The snowflake model is the structure that best suits this approach to building power and **working in teams is critical to effective organizing in the snowflake model**.

But first, why organize in teams? First and foremost, working in teams is **more fun** than working alone! Teammates also offer **support and mentorship** to one another, which play a key role in leadership development. People who feel supported and who enjoy what they're doing are more likely to keep doing it. Next, by working in teams, we can **meet higher goals** by tapping into the diverse range of resources (including skills and knowledge) multiple people bring. And most importantly, by working in teams, we **develop relationships** with fellow teammates that facilitate and deepen our commitment to taking action.

Why do organizing teams matter?

The most effective leaders have always created teams to work with them and to lead with them. Take for example Moses, Aaron, and Miriam in the story of Exodus, or Jesus and the twelve disciples in the New Testament, or Martin Luther King, Ralph Abernathy, Rosa Parks, Jo Ann Robinson, and E.D. Nixon during the Montgomery Bus Boycott.

Leadership teams offer a structural model that fosters interdependent leadership, where individuals can work towards goals together, with each person taking equal leadership on part of the team's activity. At their best, leadership teams recognize and put to productive use the unique talents of the individuals who make up the team.

Team structures also build strategic capacity—the ability to strategize creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. In the Obama campaign, the field structure included multiple layers of leadership teams to engage people creatively and strategically at all levels of the campaign. Each state had a state leadership team that coordinated regional leadership teams (of Regional Directors and Organizers), which coordinated local neighborhood leadership teams of volunteer leaders.

At every level, the people on leadership teams have a clear mission with clear goals and the ability to strategize creatively together about how to carry out their mission and meet their goals. This structure creates multiple points of entry for volunteers/partners, and multiple opportunities to learn and to exercise leadership.

Leadership teams provide a foundation from which an organization can expand its reach. Once a team is formed, members can create systems to foster a rhythm of regular meetings, clear decision making, and visible accountability, increasing the organization's effectiveness. An organization of 500 people is not accomplished by one person alone. It is built by finding people willing and able to commit to building it, including the relationships and the solid team structure that form its foundation.

## What is the structure of leadership in Organizing?

Leadership is taking responsibility for enabling others to achieve shared purpose in the face of uncertainty. The strength of a movement grows out of its commitment to develop leadership.

Sometimes we think leadership is about being the person that everyone goes to:

How does it feel to be the dot in the middle of all those arrows? How does it feel to be one of the arrows that can't even get through? And what happens if the "dot" in the middle should disappear?
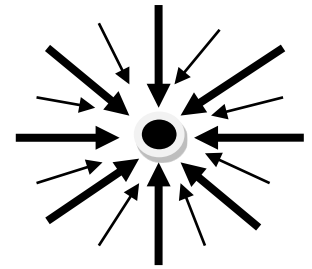
Sometimes we think we don't need leadership at all because "we're all leaders," but that looks like this:
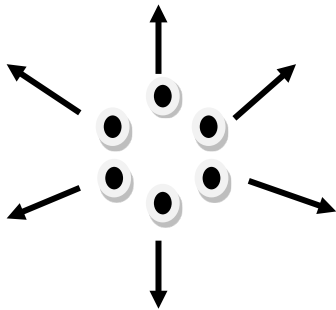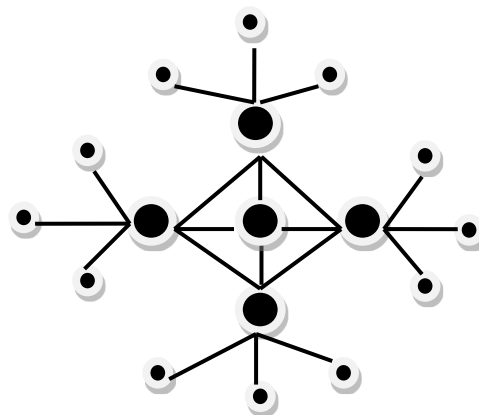
Who's responsible for coordinating everyone? And who's responsible for focusing on the good of the whole, not just one particular part? With whom does the "buck stop"?

Sometimes we use hierarchy to make it clear "who is in charge" and who "just has to get it done, whether you agree or not."
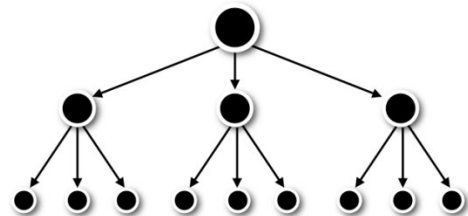
How is power distributed in this model? How do people develop as leaders? What effect does this structure have on agency, hope and creativity?

Another model for practicing leadership is this "snowflake." Leaders develop other leaders who, in turn, develop other leaders, all the way "down." Although you may be the "dot" in the middle, your success depends on developing the leadership of others.

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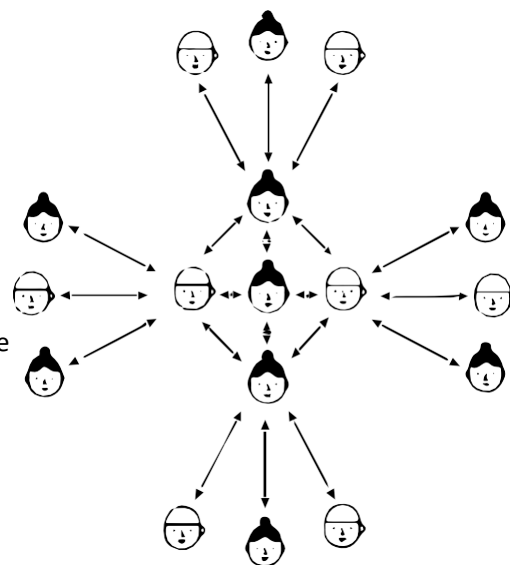# Interdependent Leadership or 'The Snowflake Model'

The Snowflake/Interdependent Leadership Model: A distributed approach to leadership

We define leadership as accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty, and the organizational model that best embodies this understanding of leadership is what we call the "snowflake model."

First, in the snowflake model, **leadership is distributed**. No one person or group of people holds all the power; responsibility is shared in a sustainable, or better yet, regenerative, way and structure aims to create mutual accountability. The snowflake is made up of interconnected teams working together to further common goals.

Second, the snowflake model is based above all on enabling others. A movement's strength stems from its **capacity and commitment to develop leadership** and in the snowflake model, everyone is responsible for identifying, recruiting, and developing leaders. Leaders develop other leaders who, in turn, develop other leaders, and so on.

Interconnected teams: This model is defined by its distribution of leadership and by its commitment to leadership development. Relationships are the glue that holds the snowflake together, and these relationships support the interconnected teams that make up the snowflake.

Core Leadership Team

Each person in this snowflake could be part of a Local Leadership Team

Local Leadership Teams
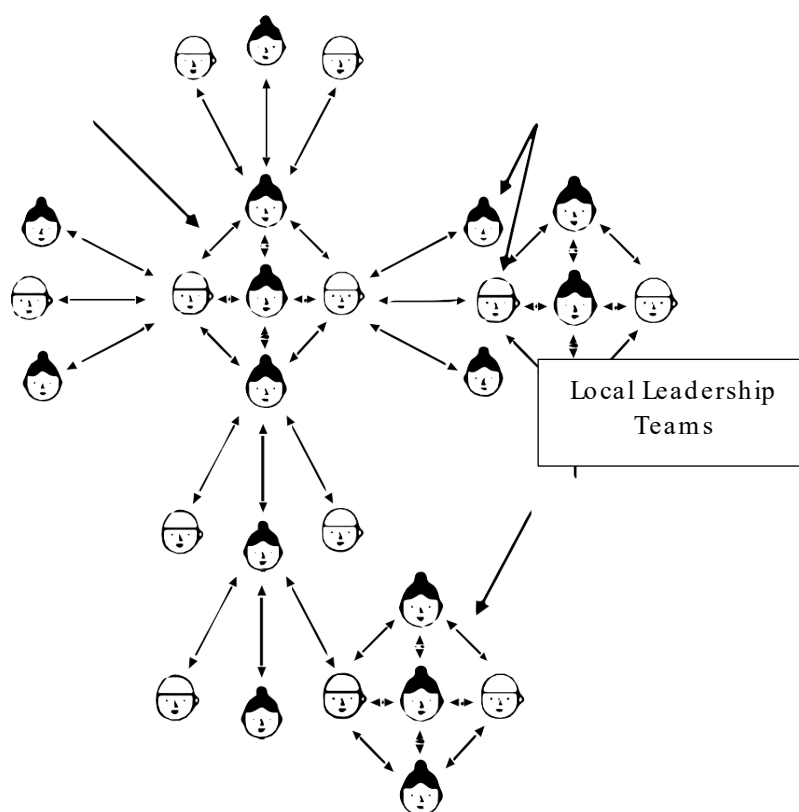
PRACTICE ACTIVITY #8: **Interdependent Leadership**

TIME: 30m

GOALS:

- ☐ Reflect on their leadership structures of your team or coalition
- ☐ Consider how their leadership structures may be impacting their performance and capacity
- ☐ Discuss with your team how you can create a more interdependent structure

AGENDA:

1.	Gather in your small group and listen to your Small Group Coach review the agenda	5m
2.	Identify any coalitions, collaborative groups, or collective initiatives in your state, especially those that are working on your chosen measure and discuss how they are doing as coalition, and if they could benefit from a more interdependent structure. • What is their current structure – who leads the group? Is it a Dot in the center? All leaders/No one is a leader? Or a snowflake? • Have they created "Power with" vs "Power over"? • Do they have workgroups? Do they share leadership amongst members? • Who is doing the work in this coalition? Where is the work stalled? • Have they done a map of actors exercise? Who might they be missing from their coalition? • How might you coach them to create a more interdependent structure?	25m
3.	Rejoin the big group for debriefing	

So why don't people always work in teams?

Effective teams who come together around a common goal or aim accomplish much more than a group of people working individually. This is particularly true when multiple skill sets are needed. We have all experienced teams that did not work well together. Teams may experience unresolved conflict, members fall into cliques, work doesn't get done, or all the work may fall on one person. The challenge is to create conditions for our teams that are more likely to lead to successful collaboration and action. When groups of people come together, conflict is always present. Effective teams are structured in ways that channel that conflict in productive ways, allowing the team to achieve its goals for the people they serve.

Three Measures of Effective Teams

1. **RESULTS (or output)**: The team successfully completes its work and meets its goals.
2. **CAPACITY:** Over time, the team learns how to work together productively. This can mean developing effective leadership and increasing the capability of teammates to take action and meet goals.
3. **LEADERSHIP DEVELOPMENT**: All individuals on the team learn new skills, gain knowledge, and grow as a result of their participation in the team.

Four Essential Conditions for Team Effectiveness

Dr. Ruth Wageman and her team studied teams from all sectors (public, private, for-profit, non-profit, government, and health care) for over thirty years and identified the top four conditions for effective teams. These four conditions (listed below) apply in business, community, and healthcare settings:

1) **The team is bounded, stable, and interdependent**:
   - **Bounded**: You can name all the people on the team. It's not a different group of people every time you meet.
   - **Stable**: Membership of the team stays constant long enough that the team learns to work together better over time; each member is fully committed to being on the team and commits consistent time and effort to it.
   - **Interdependent:** Like a sports team or an airplane crew, the contribution that each person makes to the team is critical to the success of the whole. Team members have a vital interest in each other's success and look for ways to offer support.
2) **The team has a compelling purpose.** Each team member is clear on what the team was created to do (purpose), who the team is serving (clients, customers, patients, etc.) and what kinds of activities the team will take on. They understand the work they do, the work is challenging, it matters, and they know why it matters. Team members are able to communicate the purpose of their work for themselves and others.
3) **The team creates clear, interdependent roles.** Each team member must have his or her own responsibility - his or her own "chunk" of the work on which the success of the team depends. No one is carrying out their work in isolation or in secret. An effective team will have members with different backgrounds, experiences, and opinions. The team values this diversity to ensure that everyone is bringing their best to the work.
4) **The team has explicit norms.** Explicit norms are clear expectations for how the team will work together. Norms include how they will manage meetings, communicate effectively, make decisions, and fulfill commitments. Most importantly, they set clear expectations for how they will address norm violations, so resentment doesn't build up and/or norms don't fall by the wayside.

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PRACTICE ACTIVITY #9: Team Diagnostic Checklist

TIME: 20m

GOALS:
- ☐ Honestly assess the condition of your team or coalition according to the essential conditions for effective teams
- ☐ Consider where your team excels and where the team can improve
- ☐ Think about how you contribute to creating the conditions for an effective, interdependent team and what actions you can take to make it better

AGENDA:

1.	Individually complete the Team Diagnostic Checklist or the checklist on the following page	15m
2.	Rejoin the big group for debriefing	

Further Reading

Freeman, Jo. 1970. "The Tyranny of Structurelessness." Berkeley Journal of Sociology. 1-8.

Ruth Wageman, et al., Senior Leadership Teams. Chapter 1, "The Fall of the Heroic CEO and the Rise of the Leadership Team", (1-26); Chapter 9, "What It Takes to Make Them Great", (pp. 207-218).

Deborah Ancona, Henrik Bresman & Katrin Kaeufer, "The Comparative Advantage of X-Teams", MIT Sloan Management Review, Vol. 43 No.3, Spring 2002 (pp. 33- 39).
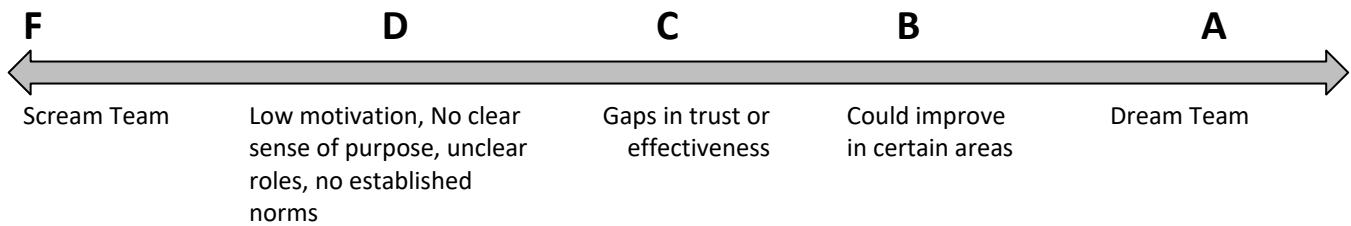
Richard L. Moreland, "The Formation of Small Groups", Group Processes, edited by Kendrick, C. (1987), (pp.80-105).

Team Coordination/Collaboration Tools (these are just a few of the more widely used):

- Google Tools
- Google Calendars to coordinate schedules
- Google groups for email management
- Google Jamboard
- GroupMe: Group texting program
- Basecamp: Project management
- Smartsheet: Work management tool

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CHECKLIST: DIAGNOSTIC CHECKLIST OF TEAM EFFECTIVENESS

Reflect on the condition of your team using the "grades" below for each key element:

F	D	C	B	A
Scream Team	Low motivation, No clear sense of purpose, unclear roles, no established norms	Gaps in trust or effectiveness	Could improve in certain areas	Dream Team

Compelling Purpose	(F)	(D/C/B)	(A)	Overall Grade:
	Not at all	Somewhat	Very much	How might we Improve?
• There is truly a shared purpose that is clear to all members.				
• The work has serious consequences *[for health and healthcare/ for the community/ for the department or the organization]* – team members know that their work matters, and their success makes a difference.				
• The work is challenging and engaging and requires committed effort from all members.				

Capabilities, Resources, Skills	(F)	(D/C/B)	(A)	Overall Grade:
	Not at all	Somewhat	Very much	How might we Improve?
• Members understand themselves as an important part of the team, not just a representative of their own position or department.				
• The team, collectively, has a high level of collaborative skills (good listening, empathy, humor, integrity).				
• Members have the ability to think about the overall system, not just their own place within the system.				
• The team is comprised of people who have a diverse set of skills, resources, and perspectives.				
• Team leaders and members have skills to encourage and coach each other to build both individual and collective capacity.				
• The team has a clear and stable boundary: it's clear who is on the team – it's not a random group at each meeting – and people stay long enough to learn to work together.				

Enabling Team Structures	(F)	(D/C/B)	(A)	Overall Grade:
	Not at all	Somewhat	Very much	How might we Improve?
• Team members explicitly understand how decisions will be made. Decision-making processes are transparent.				
• The team has clear expectations and norms for how they will respect and empower each other during their work together.				
• The team has talked about how violations of the norms will be acknowledged and addressed respectfully, without shaming.				
• Individual team members are learning; team capacity is growing over time, and the work is making a difference beyond the team.				
• Team members have clear roles, not just job descriptions, but clearly understood roles for how they contribute to the success of the team.				
• Individuals know their own role and where their role interacts with others. Members support each other while still "staying in their own lane."				
• The team communicates effectively. Team members are able to recognize and resolve conflict.				
• The organization's structures and systems enable and facilitate rather than undermine teamwork and interdependent leadership.				

Use the table below to make notes about what your team does well for each category. (Compelling Purpose; Capabilities, Resources, Skills; and Enabling Team Structures)

What does your team do well? *or what do you see other teams doing well?*	What would you like to change?	What can you do to make things better?
Compelling Purpose		
Capabilities, Resources, Skills		
Enabling Team Structures		
General		

SHARED PURPOSE & ORGANIZING STATEMENT

You can use this worksheet to reflect on the teams you are currently working with in the CCTP effort. Use the work you've done in other sections of the book and workshop to arrive at your answers.

1. In the first column, based on the work you did on common interests and values in the relationship session, write down the **unique purpose of your team**.

2. In the second column, write down **whom your team serves**: Who is your constituency? With whom would it focus its effort? What are the people like and what are their interests? What will engage them? *Note: for the purposes of this training, assume that you all are naming and bringing together all of your various constituencies.*

3. In the third column, write down the kinds of activities that your team could engage in to fulfill its purpose? What is the **unique work that your team will do?** *Again, here you can imagine how learning this process together can make you more effective at achieving the larger goal?*

MY TEAM IS: _____

Our team's shared purpose is to	The constituency we serve is *(briefly describe your constituency's characteristics)*	We will achieve our shared purpose by *(list the specific activities that your team would undertake.)*

After brainstorming answers to all three questions, take a few moments to write a sentence that you think best describes your team's purpose, its constituency, and its activities. Draw on all three columns.

Example of a shared purpose sentence:

> *We share the purpose of creating a community-based care transitions program for older adults in the Detroit community that enables greater patient self-management, reliable transfer of information to all providers involved in a patient's care, and effective care coordination. Our program will result in a 20% reduction in 30day readmissions by 2015.*

Our team's shared purpose is to

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EXAMPLE TEAM NORMS/EXPECTATIONS

Review the sample team ground rules below. Add, subtract, or modify to create norms for your team. Use the empty worksheet that follows to write down your team's norms once you have decided. Be sure to include group norms on each theme below and how you will self-correct if the norm is broken. (If you don't self-correct, the new norm will be breaking the ground rules.)

<table>
<tr><td colspan="2">Discussion and Decision-Making: How we will discuss options and reach decisions as a team to ensure vigorous input and debate?</td></tr>
<tr>
<td><u>Always Do</u>
Engage in open, honest debate
Ask great questions
Balance advocacy with inquiry</td>
<td><u>Never Do</u>
Engage in personal attacks
Fail to listen to what others say
Jump to conclusions</td>
</tr>
<tr><td colspan="2">Meeting Management: How will we manage meetings to respect each other's time?</td></tr>
<tr>
<td><u>Always Do</u>
Start on time; stay on time
Be fully present throughout the meeting</td>
<td><u>Never Do</u>
Come to meetings unprepared
Answer cell phones or do email</td>
</tr>
<tr><td colspan="2">Accountability: How will we delegate responsibilities for actions and activities? How will we follow through on commitments?</td></tr>
<tr>
<td><u>Always Do</u>
Clarify understanding
Provide follow-up on action items
Ask for/offer support when there is a need
Weekly check-in</td>
<td><u>Never Do</u>
Assume you have agreement
Assume tasks are getting done
Commit to a task that you know you won't do</td>
</tr>
<tr><td colspan="2">How will we "self-correct" if norms are not followed?

Are there other norms or expectations that you want to add that may not fall into one of the above-mentioned categories?</td></tr>
</table>

TEAM NORMS/EXPECTATIONS WORKSHEET

Discussion and Decision-making: *How will we discuss options and reach decisions as a team to ensure vigorous input and debate?*	
Always Do	Never Do
Meeting Management: *How will we manage meetings to respect each other's time?*	
Always Do	Never Do
Accountability: *How will we delegate responsibilities for actions and activities? How will we follow through on commitments?*	
Always Do	Never Do
How will you "self-correct" if norms are not followed?	

Understanding Team Roles: Discuss what roles are needed in your team. Discuss how the roles will create an interdependent leadership team. Discuss previous experiences that enable you to play your role; identify how the team can support you in playing your role.

EXAMPLES OF TEAM ROLES:

EXAMPLES OF TEAM ROLES (DURING SMALL GROUP SESSIONS AND TEAM MEETINGS)

ROLE	RESPONSIBILITIES	YOU WOULD BE GOOD FOR THIS ROLE IF YOU . . .	YOU WOULD PROBABLY NOT BE GOOD FOR THIS ROLE IF YOU…
Convener	• Create agendas and facilitate interdependent meetings • Coordinate meeting times and locations • Coordinate and support team members in delegated responsibilities • Coordinate logistics (or delegate them) for meetings	• Can stay focused on the outcome • Listen attentively to others and summarize well • Have the ability to identify talents in others and help others contribute their greatest talent to the team • Can delegate and share leadership in real time	• Try to do everything yourself • Try to direct others without listening to their interests • Get distracted easily • Are shy and reluctant to speak up • Are too equivocal and have difficulty helping the team move through conflict toward a decision when necessary
Timekeeper	• Steward your most valuable resource: time! • Work with Convener to keep group moving forward • Lead team in scheduling next steps and timelines with concrete deadlines • Hold team accountable to timelines set together	• Have a watch or timekeeping device • Keep a calendar and stick to it • Understand how to structure activities in sequence to build toward an outcome • Are willing to hold everyone accountable to time and deadlines in order to build momentum	• Never look at your watch • Think that the last calendar or day planner you bought was in 2002 • Always procrastinate • Are not willing to remind others of deadlines and to hold others accountable to deadlines that they have participated in setting and have agreed to meet
Note Taker	• Take notes at meetings to share with others • Disseminates notes to team members within 24-hours of meeting • Captures scribes' notes as part of team meeting notes	• Can synthesize discussions with clarity • Have good handwriting or can type well • Can take responsibility for getting the notes to others quickly • Can multi-task well	• Have trouble summarizing others' thoughts • Have bad handwriting or don't have regular access to a computer • Have trouble multi-tasking
Scribe	• Takes notes for the group on large post-it paper to provide visual representation and mapping of team's work together • Clarifies ideas where there is confusion • Accurately captures others' contributions to teamwork	• Has legible elementary-school teacher handwriting • Is skilled at drawing visual images and lists of ideas in an organized and clear manner • Is versatile with colored markers • Excellent listener	• Is hesitant or off-base in summarizing others' thoughts • Has poor handwriting • Is unable contribute to the group discussion while scribing • Asserts his/her own thoughts for others' contributions
Team Lead	• Pays attention to the emotional temperature of the team • Celebrates good vibes and raises check-ins when tension arises • Facilitates transparent conversation around tensions and follows up with team members.	• Sees tensions as opportunities to strengthen team's work together • Comfortable with the team norms and discussing difficult topics • Asks for help from other team members so doesn't become the policeman of the group	• Avoids conflict • Gets emotional • Makes an issue too vague or veiled so that it loses meaning and transparency • Is afraid of or is too rigid about holding people accountable

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EXAMPLE AGENDA ITEMS FOR TEAM LAUNCH

1) Establish regular meeting schedule and review agenda
2) Check in and narrative: why do you feel called to be here? Or, why is this work important to you? (3-5 min each)
3) Establish shared purpose
4) Establish roles for meeting and for work of group
5) Establish ground rules, especially a norm for decision making, and a way to hold the team accountable
6) Who is missing?
7) Next steps

SAMPLE Team Re-Launch Agenda
DATE
TIME

Attendees:

Meeting Objectives:
- clarify our shared purpose
- establish/re-establish team structure
- review, clarify and update workplan

1) Agenda review / roles for meeting	5 min

- Note-taker
- Timekeeper

2) Check-in (1 min / person)	10 min
3) The significance of this effort to the community	10 min
4) Team roles & responsibilities (see below)	10 min
5) Norms and Expectations (see below)	5 min
6) Review work plan and timeline	30 min

- Clarify goal
- Review organizing statement
- 1:1 meetings with team members
- Map out actors & resources

8) Next steps	5 min

- Next meeting
- Potential agenda items

9) Meeting evaluation	5 min

- What did we do well together today and should continue to do?
- What should we improve on next time?

What is missing from this agenda that will help make your team a Dream Team?

TYING IT ALL TOGETHER

This guide has provided an introduction to organizing as leadership that enables people to turn the resources they have into the power they need to make the change they want. We've also outlined the five key leadership practices – telling stories, building relationships, structuring teams, strategizing, and acting – that together, make up a framework for effective community organizing.

We practice telling stories, building relationships, and structuring teams to build power in our organizing. Telling stories communicates our shared values and motivates others to take action. Telling stories also connects us to one another and is key in building strong relationships. In building relationships, we secure commitment from our communities and grow and sustain a constituency. In turn, relationships are the glue that bind effective teams together, and we structure teams so that we can work together in a sustainable and empowering way.

We strategize and act to wield power in organizing. We devise strategy in response to an intolerable circumstance our community faces, and our strategy becomes our blueprint for making change. We implement strategy through acting via tactics and subsequently, deepen our relationships, strengthen our teams, and develop shared stories in the process.

By tying all these practices together in our organizing, we embody leadership as accepting responsibility for enabling others to achieve purpose. In so doing, hopefully, we achieve the change we want and develop leaders capable of creating positive change thereon.

Thank you for your participation in this Workshop. Please help us to improve our process by filling out this evaluation.

What aspects of this workshop most facilitated your learning?

How do you feel about your own team story, strategy, and structure?

5= I am very clear
4 = I am clearer than I was before attending
3= I have some clarity about certain aspects of my next steps
2 = I still have a lot of work to do in developing this campaign
1= My work in this project has not been aided by this framework

Please comment on what went particularly well during these sessions:

Please comment on what this team needs to improve as we develop this workshop for others.

Where do you feel you need the most support in the coming months? Coaching? Team Structure? Strategy? Leadership Development? Please be as specific as possible.

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