Acknowledegments

Originally adapted from the work of Dr. Marshall Ganz of Harvard University, the New Organizing Institute and the Leading Change Network.

Revised by Ashley Arden, the Stonehouse Institute, & Celine Trojand, the Dogwood Initiative.

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- A copy of any significant modifications are to be sent to Dr. Marshall Ganz. (marshall_ganz@harvard.edu), Ashley Arden (aarden@hoggan.com) & Celine Trojand (celine@dogwoodinitiative.org).

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Welcome & Goals

WHY WE’RE HERE & WORKSHOP GOALS

Welcome! In this workshop you will have the opportunity to work with your peers to develop your capacity for effective community organizing. Throughout the course of these two-days, we will explore the following questions: Why are you called to leadership in your community? How will you move others to join you? How will you structure your work together? How will you strategize outcomes you hope to achieve? And how will you achieve them?

This is a workshop in the practice of leadership as accepting responsibility for enabling others to achieve purpose under conditions of uncertainty. This practice was developed to translate voluntary effort, based on real commitment, into capacity to create change. We will work on identifying, recruiting and developing leadership, building a constituency around that leadership, and transforming the resources of that constituency into a source of the power they need to achieve their purpose.

We will cover the five basic organizing leadership practices:

1. How to articulate a story of why they were called to lead, a story of those whom they hope to mobilize, and a story of action: self, us, and now.
2. How to build intentional relationships as the foundation of purposeful collective actions.
3. How to structure their team with shared purpose, ground rules and roles for effective leadership.
4. How to strategize turning your resources into the power to achieve clear goals.
5. How to translate strategy into measurable, motivational, and effective action.

Participants will learn to become teachers of these leadership practices in their own communities.

You will see that most sessions follow a pattern: we introduce new material, we work on it in teams, and we debrief our work. This way you can begin to work with others putting your skills to work right now and learning from your experience to be more effective.

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

Together we will articulate the ways in which we want to work together these next two days to enable us to achieve these goals. Please use this worksheet to brainstorm or to capture the norms that we agree to. Tomorrow you may want to take a few minutes to review them, and to add, subtract or modify to create norms for your team.

| PLENARY NORMS | TEAM NORMS |
PERSONAL GOALS

WHAT ARE YOUR HOPES FOR THIS WORKSHOP?

WHAT KINDS OF SKILLS ARE YOU INTERESTED IN LEARNING?

WHAT CONTRIBUTIONS DO YOU SEE YOURSELF MAKING?
**Intro to Organizing: People, Power & Change**

**GOALS:**
- Introduce our people-centred approach to organizing
- Introduce the 5 key organizing practices

**WHAT IS ORGANIZING?**
Organizing is leadership that enables a community to turn its resources into the power it needs to make the change it wants. The work of an organizer is to identify potential leaders within the affected community and support them to lead change.

**PEOPLE**
The first question an organizer asks is not “What is my issue?” but “Who are my people?” Effective organizers puts people – not issues – at the heart of their efforts. Organizing is not about solving other people’s problems or advocating on their behalf, but about enabling the people with the problem to mobilize their own resources to solve it… and keep it solved.

A *community* is a group of people with a shared interest. A *constituency* is a community of people who are standing together to realize a common purpose.

**POWER**
Rev. Martin Luther King described power as the “ability to achieve purpose.” It is the capacity we generate by creatively mobilizing our collective resources to achieve a common purpose.

Power is not a thing, quality, or trait. Power is a relationship among interests and resources.

Track down the power by asking these 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 have that they need to address their interests?
Our power comes from people because our problems come from a sense of powerlessness. By organizing the people who need the change to find a real source of power among their collective resources to effect real change themselves, they are able to transform the power relationship.

Enabling people to be the authors of the change they seek not only resolves the problem, but gets at the root of the problem (powerlessness), so it stays fixed.

Organizing efforts begin with the commitment of the first person who wants to make a change. 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 join them in committing to make a change by developing leadership capacity within the community.

**CHANGE**

Real change is *specific, concrete, and significant.* It requires clear goals that will make a real difference that we can see. Change initiatives aren’t about creating awareness, having meaningful conversations, or giving great speeches – although these may contribute to an organizing campaign. Organizing is about mobilizing your constituency’s resources to achieve clear and meaningful goals.

**LEADERSHIP**

Leadership is taking responsibility for enabling others to achieve shared purpose in the face of uncertainty. A movement’s strength 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, and our organizations look like this:

Who is responsible for coordinating everyone? And who is responsible for focusing on the good of the whole, not just one particular part? Where does the buck stop?

Sometimes we use hierarchy to make it clear who is in charge and who just has to get the work 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?

The snowflake model relies instead on distributed leadership. Leaders develop other leaders who, in turn, develop other leaders, all the way out, making this model scalable. Although you may be a dot near the middle, your success depends on developing the leadership of those on the frontlines and vice versa. The core leadership teams towards the centre of the snowflake and the local leadership teams have interdependent roles and responsibilities. Decision-making responsibility is decentralized whenever possible. The closer to the centre, the more your responsibilities have to do with ensuring the whole organization is coherent and effectively moving in the same direction towards your long-term goals. The closer to the edges, the more your responsibilities have to do with ensuring the organization is flexible, effectively delivering on your short-term objectives. Everyone is responsible for strategizing, ongoing learning and identifying and growing new leaders and resources.
FIVE LEADERSHIP PRACTICES

Effective organizing efforts master five key leadership practices for turning a disorganization into an organization.

<table>
<thead>
<tr>
<th>PLENARY NORMS</th>
<th>TEAM NORMS</th>
<th>TEAM NORMS</th>
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<tbody>
<tr>
<td>Passive</td>
<td><em>Shared Story</em></td>
<td>Motivated</td>
</tr>
<tr>
<td>Divided</td>
<td><em>Shared Commitment</em></td>
<td>United</td>
</tr>
<tr>
<td>Drift</td>
<td><em>Shared Structure</em></td>
<td>Purposeful</td>
</tr>
<tr>
<td>Reactive</td>
<td><em>Shared Strategy</em></td>
<td>Initiative</td>
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<tr>
<td>Inaction</td>
<td><em>Shared Action</em></td>
<td>Change</td>
</tr>
</tbody>
</table>
1. SHARED STORY

Through public narrative we learn to communicate our values through shared stories that bring to life the collective motivation necessary for making change in the world. We tell the Story of Self, why we are personally called to leadership, the Story of Us, which translates our personal investment in a cause into common interests and shared values, and the Story of Now, which communicates the urgent challenges and choices we face and the collective action we must take. By learning how to tell a public narrative that bridges the self, us, and now, you can tap into your constituency’s emotional and moral resources, generating the trust, hope, courage and solidarity you need to persuade people to join you in leading change.

2. SHARED COMMITMENT

Commitment is the glue of any effective organizing effort. An effective organization isn’t simply a bunch of people, it is people in relationship with each other, their mutual commitment to working together to deploy their shared resources toward a common purpose. Relational commitment is what makes an organization greater than the sum of its parts. The relationships we develop in organizing go far beyond simply delivering a message, extracting a contribution, or soliciting a vote. Organizing relationships in organizing are deeply intentional and rooted in commitments people make to each other, not simply commitment to an idea, task, or issue. Investing in intentional one-on-one and small group meetings with members of your constituency allows you to understand their motivations and identify new skills, resources and potential leaders. Building power through relationships
3. SHARED STRUCTURE

The *distributed leadership structure* integrates local leadership teams with core leadership teams. Determining the effort’s broad objectives is the responsibility of the core leadership team (centre of the snowflake), while responsibility for strategizing around how to achieve these objectives is situated with local leadership teams. This interdependent structure allows the movement as a whole to be relentlessly well oriented while fostering the personal motivation of volunteers to be fully engaged. Well-intentioned efforts often flounder due to a failure to develop a clear structure. Structured leadership teams encourage the stability, motivation, creativity, and accountability necessary for using volunteer time, skills, and effort effectively. The distributed leadership structure integrates local action with the bigger, broader purpose. Good structure balances flexibility and strength, is scalable yet coherent.

4. SHARED STRATEGY

Although based in broad values, focusing on clear strategic objectives is the key to unleashing our creativity and translating our values into meaningful action. A good strategy is rooted in a clear theory of change: *how* we think we can turn our resources into the power we need to achieve our goals. A strategy isn’t set in stone, but a stake in the sand. Good strategies are iterative, revisited time and time again to make adjustments or changing course based on what you learn from putting your theories into practice.

5. SHARED 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. Such specific measures include number of volunteers recruited, amount of money raised, number of people recruited to a meeting, voters contacted, pledge cards signed, laws passed, etc. Although electoral campaigns enjoy the advantage of very clear outcome measures, any effective *organizing* drive must come up with the equivalent. Regular reporting of progress to goals creates opportunities for feedback, learning, and adaptation. Training is provided for all skills (e.g., holding house meetings, phone banking, etc.) to carry out the program. New media may help enable reporting, feedback, coordination. Transparency exists as to how individuals, groups, and the campaign as a whole are doing on progress to goals.
GOALS:

- Identify what effective coaching in organizing looks like and why it’s important.
- Learn how to apply a simple diagnostic framework & 5-step process for coaching others in organizing.
- Practice the coaching process through role-plays and reflective discussion.

WHY IS COACHING AN IMPORTANT ORGANIZING PRACTICE?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching helps enable others. There are no quick fixes, magic solutions or short cuts to organizing effectively in every situation all the time. Challenges, conflict and obstacles are inevitable. If we are going to overcome the challenges we face, we need to help each other through them. Coaching helps individuals to overcome motivational, strategic, and skill challenges that might otherwise hinder the progress of the individual, and/or the team, and thus the campaign or training. Coaching is how we can help each other level up the work that we do, strengthen our collective and individual skills and adapt to changing circumstances.

WHAT IS COACHING IN ORGANIZING?

Coaching is a direct intervention in an individual or team’s work process to help improve their effectiveness. Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns and trainings. Some examples of when coaching skills are necessary:

1. Helping an organizer overcome motivational challenges with their volunteers.
2. Assisting a leadership team in creating strategy for their organizing campaign.

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.
HOW TO PRACTISE GOOD COACHING IN ORGANIZING

Good coaching requires learning how to identify a person’s or team’s strengths and weaknesses in order to find ways to help them mobilize their strengths to overcome their weaknesses. People often know what they “should” do, but a fresh set of eyes is helpful in diagnosing the specific challenges they’re facing and initiating a brainstorm of solutions to maneuver through them.

There are three basic practices of coaching

3. Motivational (heart) coaching is aimed at enhancing effort.
4. Strategic (head) coaching is aimed at helping the team or individual plan, evaluate, or think about its strategic or structural approach.
5. Skills-based (hands) coaching is aimed at helping the team or individual execute with skill (and learn from execution).

The first part of effective coaching is diagnosing which coaching practice is most needed in any given moment. For example, if an organizer is struggling with strategy but you try using motivational coaching, it is likely to frustrate them further.

As is true for the other practices of leadership, coaching is a practice that only gets honed by DOING, and then reflecting on what works and what doesn’t. Following this simple, 5-step coaching process can help you dive in and begin your coaching practice:

<table>
<thead>
<tr>
<th>EFFECTIVE COACHING IS</th>
<th>EFFECTIVE COACHING IS NOT</th>
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<tbody>
<tr>
<td>Showing up and being present to another person’s experience and listening, with both your head and heart</td>
<td>Being so prepared that you figure out all the answers for the coachee before you even hear or observe his/her challenges</td>
</tr>
<tr>
<td>Helping the coachee explore and make sense of his/her challenges and successes and what he/she learned from it all</td>
<td>False praising of the coachee or only focusing on his/her strengths because you do not want to hurt his/her feelings</td>
</tr>
<tr>
<td>Helping the coachee to find solutions to challenges</td>
<td>Solely criticizing the coachee for his/her weaknesses</td>
</tr>
<tr>
<td>Asking questions that both support and challenge the person you are coaching</td>
<td>Telling the coachee what to do</td>
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1. OBSERVE: WHAT DO I SEE AND HEAR?

**Motivational (heart):** Are they struggling because they are not putting forth enough effort? Are they not trying hard enough because she’s embarrassed? Are they quitting too soon out of frustration or fear?

**Strategic (head):** Are they struggling because the goals are not achievable? Or because they’re not thinking creatively enough about how to use the resources they have to meet goals? Or because the overall strategy doesn’t make sense and needs to be clarified or adapted to their situation? Are they overwhelmed by the number of balls they are keeping in the air and need strategies to take the work one task at a time?

**Skills-based (hands):** Is the individual struggling because of not being able to muster the behavioral skill to execute effectively? Do they not have the skill in their repertoire? Are they getting interference from other habits and behaviors (like someone well-versed in marketing speak may think that skill set is a substitute for authentic story-telling skills)? Is there something you could model, or that this person just needs more help practicing and debriefing?
2. DIAGNOSE & INTERVENE: WHICH FORM OF COACHING DOES THIS REQUIRE? HOW WILL I INTERVENE?

Motivational Intervention: If your diagnosis is that the individual needs to put in more intense effort, choose a motivational intervention. For instance, you might encourage them with a “you can do it”

Strategic Intervention: If your diagnosis is that the individual is not understanding the focal practice adequately, or thinking about it appropriately, choose a strategic intervention. For example, you might ask questions to help your coachee to find the answer on his/her own. Or you might offer assertions about what you are observing and how you think the individual might fruitfully think about the practice differently.

Educational Intervention: If your diagnosis is that the individual lacks execution skill, choose an educational intervention. For example, you might model the behavior and invite the coachee to imitate you or work side by side with you to get the “feel” of the activity.

3. STEP BACK & OBSERVE: HOW CAN I ALLOW THE COACHEE TO DEVELOP THEIR LEADERSHIP SKILLS?

Avoid the urge to do it for them. Allow the coachee to try the intervention.

Observe them in action and note observations for your debrief.

4. DEBRIEF: WHAT DO I ASK THE COACHEE TO HELP THEM REFLECT ON THEIR EXPERIENCE?

What went well? What are you challenged by? What are some possible solutions?

What are your goals/next steps?

5. MONITOR: HOW CAN I CONTINUE TO SUPPORT THE COACHEE?

Schedule periodic check-ins to support your coachee in integrating this new or revised solution into their regular practice. Find out from the coachee how the situation has changed.

Assess whether the diagnosis and intervention was successful. Celebrate success!

Every skill that we practice throughout our training will involve coaching each other toward excellence. It may not always involve direct problem solving as described above. Coaching may be used simply to help others improve their stories, their public speaking skills or define their Theory of Change. The goal is to ask meaningful questions in order to build capacity for ourselves, our team and the individual receiving the coaching.
TEAMWORK: PRACTICE COACHING

SESSION GOALS
• Practice the coaching process by role-playing common challenges that occur in campaigns.
• Reflect on the process and framework for coaching in organizing and leadership.

AGENDA (50 MIN)

1. Find a partner to practice coaching. Choose one person to be the first coach, you’ll be switching later. 1 min

2. The coachee describes the problem he/she is facing and receives coaching. The coach should use the worksheet on the next page as a guide. 20 min

3. Still in your pairs, debrief the first-round: How was this coaching process different from giving advice or providing someone all the answers? What did the coach do well; what could be improved? 5 min

4. Switch roles and repeat
**WORKSHEET: COACHING**

Use this worksheet to record your observations, diagnosis and the type of intervention you would use as a coach during the role-plays.

<table>
<thead>
<tr>
<th>OBSERVATIONS</th>
<th>DIAGNOSIS</th>
<th>INTERVENTION</th>
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<tr>
<td>Heart (Motivational)</td>
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<tr>
<td>Head (Strategic)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Hands (Skill-based)</td>
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REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T WORK? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
**GOALS:**

- Identify the importance of meaningful public relationships in Organizing
- Identify key elements to successful relationships: shared Values, exchange of interests and resources and commitment
- Practice building intentional relationships through the art of one on one conversation

**WHY BUILD RELATIONSHIPS? TO CREATE COMMITMENT, THE GLUE OF AN ORGANIZATION**

Leadership begins with understanding yourself: your values, your motivation, your story and your commitment. But leadership is about enabling others to achieve purpose. The foundation of this kind of leadership is the relationships we build with others with whom we can share leadership.

1. **Identifying, Recruiting, and Developing Leadership:** We build relationships with potential collaborators to explore values, learn about resources, discern common purpose, and find others with whom leadership responsibility can be shared.

2. **Building Community:** Leaders, in turn, continually reach out to others, form relationships with them, expand the circle of support, grow more resources that they can access, and recruit people who, in turn, can become leaders themselves.

3. **Turning Resources into Power:** Relationship building doesn’t end when action starts. Commitment is how to access resources for organizing – especially when you come up against competition, internal conflict, or external obstacles. Commitment is based on relationships, which must be consistently, intentionally nurtured. The more others find purpose in joining with you the more they will be willing to commit resources that you may never have known they had.

**COERCION OR COMMITMENT?**

Leaders must decide how to lead their organization or campaign. Will the glue that holds things together be a command and control model based on coercion? Or will the glue be voluntary commitment? If our long-term power and potential for growth comes more from voluntary commitment, then we need to invest significant time and thought into building the relationships that generate commitment to each other and to the purpose that brings us together. That requires transparent, open and mindful interaction, not closed, reactive or manipulating maneuvers.
WHAT ARE RELATIONSHIPS?

Relationships are rooted in shared values. We can identify values that we share by learning each other’s stories, especially ‘choice points’ in our life journeys. The key is asking “Why?”

Relationships grow out of exchanges of interests and resources. Your resources can address my interests; my resources can address your interests. The key is identifying interests and resources. This means that relationships are driven as much by difference as by commonality. Our common interest may be as narrow as supporting each other in pursuit of our individual interest, provided they are not in conflict. Organizing relationships are not simply 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 people to join with us in long-term growth and action.

Relationships are created by 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 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.

Relationship as Interest
Common Interests
New Interests

Commitment

Interests

Resources

Commitment

New Resources
Common Resources
Relationship as Resource
BUILDING INTENTIONAL RELATIONSHIPS: 
THE ONE-ON-ONE MEETING

One way to initiate intentional relationships is the one-on-one meeting, a technique developed by organizers over many years. A one-on-one meeting consists of five “acts”:

Attention – We have to get another person’s attention to conduct a one-on-one meeting. Be courageous. Be up front about what your interest is in the meeting, but that first, you’d like it take a few moments to get acquainted.

Interest – There must be a purpose or a goal in setting up a one-on-one meeting. It could range from, “I’m starting a new network 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.”

Exploration – Most of the one-on-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.

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

Commitment – A successful one on 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-on-one is not to get someone to make a pledge, to give money, to commit their vote, but to commit to continuing the relationship.

BEST PRACTICES:

<table>
<thead>
<tr>
<th>DO</th>
<th>DON’T</th>
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<tbody>
<tr>
<td>Schedule a time to have this conversation (usually 30 to 60 minutes)</td>
<td>Be unclear about purpose and length of conversation</td>
</tr>
<tr>
<td>Plan to listen and ask questions</td>
<td>Try to persuade rather than listen and ask questions</td>
</tr>
<tr>
<td>Follow the steps of the conversation above</td>
<td>Chit chat about private interests</td>
</tr>
<tr>
<td>Share experiences and deep motivations</td>
<td>Skip stories to “get to the point”</td>
</tr>
<tr>
<td>Share a vision that articulates a shared set of interests for change</td>
<td>Miss the opportunity to share ideas about how things can change</td>
</tr>
<tr>
<td>Be clear about the ‘when and what’ of your next step together.</td>
<td>End the conversation without a clear plan for the next steps.</td>
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TEAMWORK: PRACTICE RELATIONSHIP BUILDING

GOALS

• Practice the art of the 1-to-1 conversation

• Discern values your team shares, interests it has in common, and resources at its disposal.

AGENDA

TOTAL TIME: 60 MIN.

1. Gather in your team. Choose a timekeeper and scribe. Review the agenda below. 3 min

2. Break into pairs. Practice a one-to-one to learn about each other’s values, interests, skills and resources.

   • One person initiates the conversation. Be curious, ask questions, take your time and go deep. Share some of your own story too.

   • After 20 minutes switch partners so the other person leads the conversation.

   • Listen for and write these down for later: your common values, your shared interests and your skills and resources.

   • Make a specific commitment to each other about how you will continue the relationship.

3. Get to know your team. 17 min

Each pair reports back on the following three questions:

• What did you learn about values that you share?

• What did you learn about common motivating interests you have?

• What did you learn about the resources each of you brings to this team?

Ask your note-taker to record these on a flipchart for your team like this sample:

<table>
<thead>
<tr>
<th>OUR COMMON VALUES</th>
<th>OUR SHARED INTERESTS</th>
<th>OUR UNIQUE RESOURCES</th>
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<tr>
<td></td>
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</table>
WORKSHEET: PRACTICE RELATIONSHIP BUILDING

ONE-ON-ONE PRACTICE

Choose a partner you don’t know. Learn about why she/he has been called to do this work. Probe with “why?” questions to get to choice points and specific experiences that shaped her/his life.

Share your story. Listen to your partner’s story for the motivations and the resources she brings to the campaign (leadership skills, a following, action skills, etc.). Be specific.

Avoid talking about issues like justice in an abstract and detached way — get to the lived experience of why you care about the specifics that you want to do something about. What values were you taught that make you care about this? How did you learn these values? From whom?

Story: What’s your family story? What in your life brought you here today?

Hope: What motivates you to act to organize others? What’s your vision of how things could be different if we work together?

Challenges: What keeps you from action? What do you fear? What would you want to learn?

Leadership Resources: What skills do you have? How do you lead others already in your life? What would you be willing to bring to this movement?

What values do we share?
What interests can we act on together?
What skills and resources do we each bring to this work?
When will we meet again to take action and to keep building this relationship?
REFLECTION:

HOW DOES THIS WAY OF DOING ONE-ON-ONES COMPARE WITH OTHER TYPES OF CONVERSATIONS YOU HAVE? HOW IS IT DIFFERENT FROM AN INTERVIEW? HOW IS IT DIFFERENT FROM A SALES PITCH?

WHAT WAS MOST CHALLENGING ABOUT THAT EXERCISE?

HOW COULD THIS TYPE OF RELATIONSHIP BUILDING (EITHER THROUGH ONE-ON-ONES OR AT TEAM MEETINGS) BE USED IN ORGANIZING YOUR COMMUNITY?
REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T WORK? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
GOALS:

• Understand how to develop a shared purpose for an organizing effort.

• Understand how to design effective leadership teams.

• Practice those skills by developing a shared purpose, clarifying team roles and responsibilities, and creating norms and practices of coordination.

LEADERSHIP TEAMS

Most effective leaders create teams to work with them and lead with them. Take for example Martin Luther King, Ralph Abernathy, Rosa Parks, Jo Ann Robinson and E D Nixon during the Montgomery Bus Boycott.

A leadership team offers a structured way to work together interdependently, each person taking leadership on during 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 help create 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 created 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 had 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 created multiple points of entry for volunteers, 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, systems can be created to establish a rhythm of regular meetings, clear decisions 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 helping build it, and creating relationships and a solid structure from which it can be built.
WHY DON’T PEOPLE ALWAYS WORK IN TEAMS?

We have all been part of volunteer teams that have not worked well. They fall into factions, they alienate each other, or all the work falls on one person. Some aim to keep the pond small so they can feel like big fish. So many of us come to the conclusion: I’ll just do it on my own; I hate meetings, just tell me what to do; I don’t want any responsibility; just give me stamps to lick. There’s just one problem: we can’t become powerful enough to do what we need to do if we can’t even work together to build campaigns we can take action on.

The challenge is to create conditions for our leadership teams that are more likely to generate successful collaboration and strategic action. When groups of people come together, conflict is always present. Effective teams are structured in a way to channel that conflict in productive ways, allowing the team to achieve the goals it needs to win.

THREE STEPS TO LAUNCHING AN EFFECTIVE TEAM: SHARED PURPOSE, INTERDEPENDENT ROLES & EXPLICIT NORMS.

SHARED PURPOSE

We can’t start building an organization without a clear mission.

A team must be clear on what it has been created to do (purpose) and who you will be doing it with (constituency). The work you have to do should be readily understood, challenging, and matter. Team members should be able to readily articulate their shared purpose.

The first step in articulating your shared purpose is to identify the people you are organizing, your constituency. Who are our people? What is their experience of the problem? What happens if we fail to act? What is the nightmare that awaits – or may already be here? On the other hand, what could happen if we do act? What’s our dream, a possibility that could become reality?

A compelling organizing purpose is a response to injustice. What is the intolerable condition that we want to end or avoid? How exactly does the problem manifest in our constituent’s everyday lives?

INTERDEPENDENT ROLES

Each team member must have their own responsibility, their own chunk of the work on which the success of the whole depends. No one is carrying out activity in a silo that’s secretive to others. A good team will have a diversity of identities, experiences and opinions to ensure that the most possible is being brought to the table.
EXPLICIT NORMS

Your team sets clear expectations for how to govern itself in your work together. How will you manage meetings, regular communication, decisions, and commitments? And, most importantly, how will you correct ground-rule violations so they remain real ground rules? Teams with explicit operating rules are more likely to achieve their goals. Some team norms are operational; such as How often will we meet? How will we share and store documents? How will we communicate with others outside the team? Others address expectations for member interaction with each other. Initial norms guide your team in its early stages as members learn how to work together. Making them explicit allows your team to have open discussions about how things are going and give you something to refine as you go to improve your working relationships.

THREE CONDITIONS THAT MAKE A REAL TEAM.

Your team is bounded. You can name the people on it, they don’t come and go, whoever shows up doesn’t have the automatic right to participate in the team. Most highly effective teams have no more than 4 - 8 members.

Your team is stable. It meets regularly. It’s not a different, random group of people every time. Membership of the team remains constant long enough that the team learns to work together better and better; each member is fully committed to be on the team and commits consistent time and effort to it.

Your team is interdependent. As on an athletic team, a string quartet, or an airplane cabin crew, the contribution that each person makes is critical to the success of the whole. Team members have a vital interest in each other’s success, looking for ways to offer support.

HOW DO YOU KNOW IF YOUR TEAM IS EFFECTIVE?

1. OUTPUT: Your team achieving its objectives.

2. CAPACITY: Over time your team is growing its capacity for effecting change by learning how to work more effectively together as a team, identifying new skills and resources and building the organization.

3. LEADERSHIP DEVELOPMENT: Members of your team are strengthening their leadership capacity as a result of their participation.
TEAMWORK: LAUNCHING YOUR TEAM

GOALS

- Develop your team purpose.
- Define your leadership roles.
- Decide on a decision-making process and identify the norms you will practice as a team.

AGENDA

TOTAL TIME: 60 MIN.

1. Gather in your group and choose a timekeeper. Review the agenda. 2 min
2. Review your shared interests from the last session. 3 min
3. Develop your shared purpose using the worksheet that follows. Focus on how you as a team will work together. 25 min
4. Design interdependent team roles. Brainstorm possible responsibilities as you work together beyond this workshop. For example, who will coordinate the meetings? Talk about how these roles might match up with the talents of those on your team. See an example of team roles below. Imagine what stable roles would be needed for this team to function over the course of this workshop OR imagine roles required for the ongoing work of the team around a campaign, etc. 10 min
5. Decide on explicit norms that will enable you to function with shared commitment. Use the worksheet that follows. 10 min
6. Create a team name and team chant. 8 min
7. Be prepared to present your team purpose and chant in 2 min. to the larger group. Rejoin the larger group. 2 min
WORKSHEET: DEVELOPING SHARED PURPOSE

PART 1: SHARED PURPOSE (25 MINUTES)

There are four parts to this exercise. In the first part, as individuals, you will take 5 minutes to clarify your own thinking about what the purpose of your team could be as you work together. In the second part, as a team, you will take 10 minutes to share your ideas, look for the common focus, and discern a purpose you can all support. You then have 5 more minutes to write a new sentence that you think captures the sense of your team. And finally, as a team, you will have 5 more minutes to consider the second round of sentences and decide on one that best articulates your team’s perspective.

1. Determine your people, their problem, and the goal (5 min)
Reflecting on your team’s shared values and interests, take some time individually to try filling in the table below:

WHO ARE MY PEOPLE?

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>HOPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>What <strong>PROBLEM</strong> do your people need to solve?</td>
<td>How will the world <strong>CHANGE</strong> if they solve it?</td>
</tr>
</tbody>
</table>
Try writing your shared purpose as an organizing sentence for your team:

**WE ARE ORGANIZING (WHO?) TO (DO WHAT?)**

**PART 2: TEAM WORK (10 MINUTES)**
As each person reads his or her sentence the facilitator notes the key words on the wall poster under purpose, constituency, or work. Note specific words to which you respond, that spark your curiosity, or that give you energy. When you are done, your facilitator circles the words that seem to resonate most strongly with your team.

**PART 3: INDIVIDUAL WORK (5 MINUTES)**
In light of what you learned from the last session, write a new sentence that you think can articulate a shared purpose, using some of the key words and themes.

**OUR TEAM’S SHARED PURPOSE IS TO ORGANIZE (WHO?) TO (DO WHAT?)**

**PART 4: TEAM WORK (5 MINUTES)**
We will read our sentences again and choose – or combine – one that can best articulate the shared sense of your team.
WORKSHEET: DEVELOPING TEAM NORMS

TEAM NORMS/EXPECTATIONS (10 MINUTES)
Review the sample team norms below. Add, subtract or modify to create norms for your team. 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 norms.)

DECISION-MAKING: WHAT IS THE PROCESS BY WHICH WE WILL MAKE DECISIONS?
• Majority rules: Whatever gets the most votes wins.
• Consensus: Everyone must agree.
• Delegation: Nominate one or two people on your team to be the ultimate decision-makers.
• Coin flip: Leave the decision to fate!
• Other:

DISCUSSION AND DECISION-MAKING: HOW WE WILL DISCUSS OPTIONS AND REACH DECISIONS AS A TEAM TO ENSURE VIGOROUS INPUT AND DEBATE?

<table>
<thead>
<tr>
<th>ALWAYS DO</th>
<th>NEVER DO</th>
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<tbody>
<tr>
<td>Engage in open, honest debate</td>
<td>Engage in personal attacks</td>
</tr>
<tr>
<td>Ask open-ended questions</td>
<td>Fail to listen to what others say</td>
</tr>
<tr>
<td>Balance advocacy with inquiry</td>
<td>Jump to conclusions</td>
</tr>
</tbody>
</table>

MEETING MANAGEMENT: HOW WILL WE MANAGE MEETINGS TO RESPECT EACH OTHER’S TIME?

<table>
<thead>
<tr>
<th>ALWAYS DO</th>
<th>NEVER DO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start on time; stay on time</td>
<td>Come to meetings unprepared</td>
</tr>
<tr>
<td>Be fully present throughout the meeting</td>
<td>Answer cell phones or do email</td>
</tr>
</tbody>
</table>

ACCOUNTABILITY: HOW WE WILL DELEGATE RESPONSIBILITIES FOR ACTIONS AND ACTIVITIES? HOW WILL WE FOLLOW THROUGH ON COMMITMENTS?

<table>
<thead>
<tr>
<th>ALWAYS DO</th>
<th>NEVER DO</th>
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<tbody>
<tr>
<td>Clarify understanding</td>
<td>Assume you have agreement</td>
</tr>
<tr>
<td>Provide follow-up on action items</td>
<td>Assume tasks are getting done</td>
</tr>
<tr>
<td>Ask for/offer support when there is a need</td>
<td>Commit to a task that you know you won’t do</td>
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<tr>
<td>Weekly check-in</td>
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HOW WILL YOU “SELF CORRECT” IF NORMS ARE NOT FOLLOWED?
**Teams work best when you have a regular, reliable time to coordinate together. What will your team’s regular meeting time and place be?**

**WORKSHEET: DEVELOPING TEAM ROLES**

**UNDERSTANDING TEAM ROLES**

Review the Team Coordinator role below as an example of what roles might look like in your individual campaigns. Think about how your roles would fit together to create an interdependent leadership team that supports one another in your individual projects. What would each role have to be good at? Then, go around the circle and ask each person to tell others: 1) **What experience and talents they have** that might contribute to the leadership team and 2) **What specifically they want to learn in more detail** (30 seconds each). How might these talents match up to particular roles? Are there any clear “fits”?  

*Note:* These team roles should not be seen as permanent. For the team to be strong, all leaders should have to earn leadership by carrying out responsibilities relevant to the role they seek.

<table>
<thead>
<tr>
<th>ROLE</th>
<th>RESPONSIBILITIES</th>
<th>YOU WOULD BE GOOD FOR THIS ROLE IF YOU . . .</th>
<th>INTERESTED TEAM MEMBERS &amp; RELATED SKILLS/TALENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Coordinator</td>
<td>Coordinate the work of the leadership team. Prepare for meetings, give support and coaching to the team</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TEAM NAME & TEAM CHANT (8 MINUTES)

TEAM ROSTER

<table>
<thead>
<tr>
<th>NAME</th>
<th>PHONE</th>
<th>EMAIL ADDRESS</th>
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</table>
REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T WORK? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
GOALS:

- Learn an actor-centered approach to strategizing and how to develop a theory of change
- Practice devising a strategy for a community organizing campaign

When you structured your leadership team you decided on a shared purpose: your constituency and your overall mission. The challenge now is to strategize just HOW you will carry out that purpose.

You’ve identified the people whom you are organizing, your constituency, now it is time to map out the other relevant actors. The second step is analysis: You’ve identified your big picture goal, but why hasn’t that problem been solved already, how could you use a community organizing approach to solve the problem by focusing on a clear, observable, and motivational goal. And the third step is to figure out how your constituency can mobilize its resources to achieve that goal with appropriate targeting, timing, and tactics.

WHAT IS STRATEGY?

Turning what you HAVE (people/resources) into what you NEED (power) to get what you WANT (goal/change).

- **WHAT YOU WANT - Defining and Committing to a goal**
  Clear, measurable outcomes that allow you to know if you’ve won or lost, succeeded or come up short in achieving them.

- **WHAT YOU NEED - Power**
  Tactics through which you can creatively turn your resources into the capacity you need to achieve your goal.

- **WHAT YOU HAVE- Constituency / Resources**
  Your constituency’s resources – time, skills, money, relationships; your allies, supporters, your leadership.

HOW STRATEGY WORKS?

**Strategy is Motivated – What’s the problem?**

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 Creative – What can we do about the problem?**

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.

**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 a Verb – How can we adapt as we learn to solve the problem?**

(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. Like a potter interacting with the clay on the wheel, as Mintzberg describes it.

<table>
<thead>
<tr>
<th>STRATEGIC PLANNING</th>
<th>CALL TO ACTION STRATEGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Something we have</td>
<td>Something we do</td>
</tr>
<tr>
<td>Think your way into new acting – energy goes into the document</td>
<td>Act your way into new thinking – energy goes into actions</td>
</tr>
<tr>
<td>We create, then implement a plan</td>
<td>We strategize as we implement</td>
</tr>
<tr>
<td>Time as a cycle</td>
<td>Time as an arrow</td>
</tr>
</tbody>
</table>

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? How can you increase the diversity (and in turn the capacity) of this group to strategize creatively?

KEY QUESTIONS IN STRATEGIZING
1. Who are our PEOPLE?
2. What is the PROBLEM?
3. What is our GOAL?
4. What are the TACTICS?
5. What is the TIMELINE?

STEP 1: WHO ARE OUR PEOPLE?

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. It makes a big difference whether we think of people with whom we work as constituents, clients, or customers. *Constituents* (from the Latin for “stand together”) associate on behalf of common interests, commit resources to acting on those interests, and have a voice in deciding how to act. *Clients* (from the Latin for “one who leans on another”) have an interest in services others provide, do not contribute resources to a common effort, nor do they have a voice in decisions. *Customers* (a term derived from trade) have an interest in goods or services that a seller can provide in exchange for resources in which he or she has an interest. The organizers job is to turn a *community* – people who share common values or interests – into a *constituency* – people who can 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 people with whom you work to organize everyone else. Their work, like your own, is to “accept responsibility for enabling others to
achieve purpose in the face of uncertainty.” They facilitate the work members of their constituency must do to achieve their shared goals, represent their constituency to others, and are accountable to their constituency. Your work with these leaders is to enable them to learn the five organizing practices you are learning: relationship building, story telling, structuring, strategizing, and action. By developing their leadership, you, as an organizer, can not only get to scale, but you also are creating new capacity for action – power – within your constituency. For the purpose of this exercise your group here is your leadership team.

**OPPOSITION**

In pursuing their interests, constituents may find themselves in conflict with interests of other individuals or organizations. An employers’ interest in maximizing profit, for example, may conflict with an employees’ interest in earning a comfortable wage. A tobacco company’s interests may conflict not only with those of anti-smoking groups, but of the public in general. A street gang’s interests may conflict with those of a church youth group. The interests of a Republican Congressional candidate conflict with those of the Democratic candidate in the same district. At times, however, opposition may not be immediately obvious, emerging clearly only in the course of a campaign.

**SUPPORTERS**

People whose interests are not directly or obviously affected may find it to be in their interest to back an organization’s work financially, politically, voluntarily, etc. Although they may not be part of the constituency, they may sit on governing boards. For example, church organizations and foundations provided a great deal of support for the civil rights movement.

**COMPETITORS AND COLLABORATORS**

These are individuals or organizations with which we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. Two unions trying to organize the same workforce may compete or collaborate. Two community groups trying to serve the same constituency may compete or collaborate in their fundraising.

**OTHER**

These are individuals and actors who may have a great deal of relevance to the problem at hand, but could contribute to solving it, or making it harder to solve, in many different ways. This includes the media, the courts, the general public, for example.

**STEP 2: WHAT’S THE PROBLEM?**

Mapping the actors can help us identify the source of the problem challenging our constituency and ways they could overcome it through a campaign. 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.
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?

WHAT WOULD IT TAKE TO SOLVE THE PROBLEM? – WHAT IS OUR THEORY OF CHANGE?

Think about a significant change that you want to bring about in your organization, community or the wider world. How would you go about achieving it? The way you answer this question will depend on your assumptions and analysis about why things are the way they are and what needs to happen to alter them. “If we do X, then Y change will happen.” This is what we mean by “theory of change.”

There are many possible theories of change:

• **Education**: This approach to change assumes that what is required to bring about change is the acquisition of some particular information, understanding or new practice to change behaviour.

• **Raising Awareness**: Here, we assume that if only people were informed about our issue they would be naturally inclined to support our cause. All that is required is to remind people of the issue, raise it to a higher level of prominence, and people will change their behaviour.

• **Technological innovation**: The problem has been recognized, but people haven’t figured out how to solve it. What is required is a technical solution. In health care, a new and improved facility is one example. The innovative use of the facility allows us to improve population health. However, its existence alone does not solve the problem. Just because we build it, does it mean people will come? What would it take to get them to use it?

• **Marketing**: In this approach to change, we sell things as commodities and appeal to the preference of our customers.

• **Service**: In the service theory of change we do things on behalf of others. While good intentioned, in service “we” act for “others.” There is not an “us” that unites us, so much as we do not act together with one another.

IN COMMUNITY ORGANIZING THE THEORY OF CHANGE IS BASED ON POWER RELATIONSHIPS

In this context power is not something that you have by virtue of the position you hold in an organization. It is not a personal quality or a trait. In organizing we think of power as the influence
created by the relationship between interests and resources. In the words of Rev. Martin Luther King power is the “ability to achieve purpose.”

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 COMMUNITY ORGANIZING A CONSTITUENCY TURNS ITS RESOURCES INTO THE POWER TO MAKE CHANGE**

If your interest in my resources and my interest in your resources gives us an interest in combining resources to achieve a common purpose we can develop our collective power. We call this “power with.” But 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.”

Our power comes from people—the same 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 at hand; 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.
How then can we proactively organize our resources to shift the power enough to win the change we want—and have more capacity to win more over time? Power is a kind of relationship and we can track it down by answering four questions:

1. What do WE want?
2. Who has the RESOURCES to create that change?
3. What do THEY want?
4. What resources do WE have that THEY want or need?

If it turns out that we have the resources we need, but just need to use them more collaboratively, then it’s a “power with” dynamic. If it turns out that the resources we need have to come from somewhere else, then it’s a “power over” dynamic. So the question is: how can our constituency use its resources in new ways that will create the capacity it needs to solve its problems?

**STEP 3: WHAT’S THE GOAL?**

Inspired by our motivating vision, our next step is to decide on a strategic objective on which we will focus our energy – a clear, measurable goal to which we can commit. Making this choice is the most important strategic choice we have to make in designing the campaign.

To begin putting our resources to work solving our problems we have to decide where to focus:
what goal can we work toward that may not solve the whole problem, but that will get us well on the way to solving the problem. No one strategic goal can solve everything. But unless we choose “a” goal to focus on, we’ll risk wasting our precious resources in ways that just won’t add up. Your choice of a goal will depend on your assumptions and analysis about why things are the way they are and what action needs to be implemented in order to change them, i.e. theory of change.

**CRITERIA FOR GOOD STRATEGIC GOAL:**

1. Focus of Resources (on a single strategic outcome)
2. Constituent Resources (builds our capacity)
3. Point of Leverage (our constituency’s strength and weakness of opposition)
4. Motivational Force (visible, significant)
5. Contagious (can be emulated)

This pyramid chart illustrates that strategy is nested; each level of a campaign requires projecting and outcome, assessing the resources available to achieve that outcome, assessing the relevant environmental factors, and devising a strategy (targeting, timing, tactics) to translate available resources into that outcome. So in the bus boycott, planning their initial meeting required strategizing just as much as their yearlong boycott plan required strategizing. It was likely different people were responsible for different strategic scope at different levels of the organization or for different time periods, but good strategy is required at every level. No one strategic goal can solve everything, but unless we choose “a” goal to focus on we’ll risk wasting our precious resources in ways that just won’t add up.
After agreeing upon criteria that make for a good strategic goal, brainstorm again, generating as many possible goals as you can. Then evaluate them each against the criteria you’ve established. Then come up with an “if-then sentence,” imagining ways your constituents could use their resources to achieve this goal. IF we do this, THEN that will likely happen. Once you’re satisfied, you are ready to articulate your organizing sentence:

“We are organizing **WHO** to **WHAT OUTCOME** through **HOW** by **WHEN**.”

Similarly, we ask ourselves why the change we are seeking has not happened already and what it would take to create effective collaboration to address the challenge we’re facing:

• If the need is so urgent, why hasn’t it been addressed already? If it has, why did previous efforts fail?

• Who holds the resources to meet the challenges, i.e. who are our commitment groups? The providers? Citizens? Payers? The local government? Who specifically?

• What resources does each group have to take action on the change we want?

• Why haven’t they acted? Or have they, but not known how to act effectively?

• What are the interests of our constituencies? What do they want?

• How can we use the resources of our constituencies groups to achieve change?
TEAMWORK: STRATEGY I - PEOPLE, PROBLEM & GOAL

GOALS

• To analyze the problem that you are trying to solve.
• To decide on a strategic goal that can help you solve the problem.
• Identify common values, interests, and resources amongst the team
• Learn how to build relationships to develop leadership, community and power
• Practice building intentional relationships through the skill of one-to-one organizing conversations

AGENDA

TOTAL TIME: 60 MINUTES

As a team, you will map the actors and come up with a strategic goal for your team’s organizing campaign. Then you’ll reconvene to get feedback before breaking out again for a second strategizing session.

1. Gather in your team. Choose a timekeeper and scribe. Review agenda and your team’s shared purpose. 3 min
2. Map the actors. 20 min
3. Track down the power. 15 min
4. Write your theory of change / organizing sentence 20 min
5. Choose someone from your group to present the visualization of your strategic goal and organizing sentence in one minute to the other teams 5 min

A FEW HINTS BEFORE YOU DIVE IN:

• Time is tight in this session. Help your facilitator keep the discussion focused and moving forward. If you need extra time, consider using part of the lunch hour to continue your work.
• Avoid getting stuck. This is only the beginning of an iterative strategizing process! Keep it rolling.
• Use your imaginations to consider possibilities, without getting shut down by what seems impossible or most probable.
• Strategy is an exercise in creativity. Use your resources (flipcharts, colors, stickies, etc.) and remember the golden rules of brainstorming: everybody joins in, don’t judge, build on each other’s ideas, go for quantity and… go wild!
WORKSHEET: STRATEGY I - PEOPLE, PROBLEM & GOAL (60 MIN.)

Now you will develop your strategic goal based on an analysis of who your constituency is, what they want, who the other actors are, and how your constituents can turn what they have into what they need to get what they want. Follow the steps below.

TEAMWORK

Step 1. Mapping the Actors  [TOTAL: 20 min]

1) Prepare the Map  (10 min)

Draw a map-of-actors chart like the one you see below on flipchart paper. Write the names of all of the actors on sticky notes and place them on the map of actors. Start with yourselves. Put your names on yellow post-it notes. What are your individual and team interests and resources? Use what you learned from building relationships to fill this out.

*Who has the resources to create that change we want? What are their names, what organizations do they work in or lead in, what titles or roles do they have? What specific decision-making power or resources do they have that we need? Put yourself in their shoes – what are their interests?
2) Now put them on the Field! (10 min)

Step back and look at your map of actors, interests and resources.

Think of it like a board game. Who has the greatest interest in change? Who has the greatest interest in the status quo? Who is on the sidelines who could be organized to join your cause? What else do you notice about your map?
Brainstorm other actors involved in your efforts, at local, state, and national levels by name or specific position wherever possible. Put these names on post-its and add them to the map. Include the following:

1. Who might be members of your constituency?
2. Who might be your opposition?
3. Who might be your allies?
4. Who might be competitors and collaborators?
5. Who might play other key decision-making roles, depending on how they are mobilized (courts, press, voters, etc.)
Step 2. Track Down the Power [TOTAL: 15 min]

1) Who are the people facing the problem? Refer to Step 1.

2) Who has the resources/power to solve the problem and created change? Is it our people? Is it others? Analyze.

3) Why have we/they not created the change yet? What do we/they want?

4) How can we leverage our resources to create the change we want?
Step 3. Theory of Change [TOTAL: 20 min]

1. Reflecting on your new understanding of the power relationship, brainstorm and decide on a theory of change (15 min)

   *IF my people do ______________, THEN the result will be ______________,
   because_______________________________________________________

   Example: 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.

2) Write Out Your Organizing Sentence (5 min)

   Now you are ready to combine your shared purpose + your theory of change into the first draft of your organizing sentence: “We are organizing **WHO** to achieve **WHAT** through **HOW** by **WHEN**.”

   *Bus boycott example: We are organizing African Americans in Montgomery to end segregation on the busses by boycottng the bus system.

   On a piece of flipchart paper, write your team’s organizing sentence:

   **We are organizing** ___________________________________________ (WHO - constituency)
   **To** _________________________________________________________ (WHAT - goal)
   **by** _________________________________________________________ (HOW – strategy)

   Choose one person from your group to present in one minute the picture of your strategic goal and your theory of change and organizing sentence to the large group during debrief.

**REFLECTION AND DEBRIEF**

**WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?**

**WHAT DIDN’T? WHAT WERE THE ‘THORNS’?**

**WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?**

**GENERAL REFLECTIONS:**
GOALS:

• Learn to shape tactics that motivate participants to want to come back and do more.

TACTICS
Tactics put your strategy into practice. Strategy without tactics is just a bunch of nice ideas. Tactics without strategy are a waste of resources. So the art of organizing is in the dynamic relationship between strategy and tactics, using the strategy to inform the tactics, and learning from the tactics to adapt strategy.

Your organization will quickly get into trouble if you use a tactic just because you happen to be familiar with it, but haven’t figured out how that tactic can actually help you achieve your goal. Similarly, if you spend all your time strategizing, without investing the time, effort, and skill to learn how to use the tactics you need skillfully, you will have wasted your time. Strategy is a kind of hypothesis: if I do this (tactic), then this (goal) will happen. And like any hypothesis, the proof is in the testing of it.

CRITERIA FOR EFFECTIVE TACTIC

1. Does it help you achieve your GOAL?
   • Makes concrete, measurable progress toward campaign goals.

2. Does it make strategic use of your RESOURCES?

3. Does it build CAPACITY?
   • New leadership is developed
   • New organizational and team capacity is created
   • Motivational, fun & simple
   • Broadens your constituency beyond the usual suspects

ACTION
The goal of action is to effectively mobilize and deploy resources in ways that build our power to win.

First, action should be strategic: it makes concrete, measurable progress toward campaign goals. The action clearly communicates your vision to your target, the public, and the base you’re mobilizing.

Second, action should strengthen your organization and attract and engage new people; it increases our community’s capacity to affect change in the future.
Third, action should support the growth and development of individuals involved in the campaign: it builds leadership. Without action, we cannot achieve these goals.

**HOW CAN WE ENGAGE IN EFFECTIVE ACTION?**

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

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**COMMITMENT**

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. We need others to join us. When Martin Luther King marched from Selma to Montgomery, he did not march alone; he was joined by 600 other committed marchers. In fact, King did not conceive of the march, but was brought in by the organizers who reached out to him and got a commitment!

Getting clear commitments from others is essential. So why don’t we always just ask? We are sometimes worried of burdening others, sometimes worried that they will say no and we’ll feel rejected, and sometimes we are worried that they’ll say yes and we’ll then be more committed ourselves! Remember though, that when you became involved, it was probably because someone asked you. In fact, when we ask someone to join us, we are often giving them the opportunity to engage in meaningful action that most people crave.

So how do we ask? When asking for commitments, it is essential that we use clear, concise language. Asking for commitments involves two straightforward steps:

1. Explanation of why the action you are asking another to take is important (drawing on your story of now).
2. Explicitly asking the other person if you can count on them to engage in the relevant action (attending a meeting or event, taking responsibility for particular parts of a campaign or event).
• “Can we count on you to join us in ____________ ?”

• “Will you join me in doing ____________ ?”

**MOTIVATIONAL ACTION DESIGN**

Second, for action to successfully engage others in a way that expands rather than depletes our resources, we need to design action mindfully. Once we have gotten a 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 feel that they are being employed as automatons, or they do not grow and learn as they act, then they are unlikely to come back the next time we ask for a commitment.

**CONDITIONS FOR MOTIVATIONAL VOLUNTEER ENGAGEMENT**

- **Meaningful**: the person can see that the action is significant and makes a difference toward achieving a meaningful goal.

- **Autonomy**: people are given levels of responsibility according to their skills and abilities to achieve a particular outcome.

- **Feedback and Learning**: People can see the progress of their work, whether or not they are doing it well, and get coaching from more experienced leaders so they can learn and grow.

These three experiences 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.

There are five assessment criteria that serve as guidelines for designing motivational action. The more we ask people to commit to action that scores high on these five criteria, the more people will want to continue to volunteer to work with us. Nearly any action can be re-designed to provide a more meaningful experience that supports individual creativity and growth while clearly achieving the campaigns goals. These are the criteria:

- **Task Identity** – participants get to do the whole thing from start to finish.

- **Task Significance** – understanding and seeing the direct impact of the work.

- **Skill Variety** – engaging a variety of skills, including heart, hands, and mind.

- **Autonomy** – having the space to make competent choices about how to work.

- **Feedback** – results are visible to the person performing the task, even as they perform.
How will we “chunk out” our measurable goal over time and space? What are the dates and benchmarks? How will we construct our campaign so we are building capacity and developing leadership over time?

A campaign is a way to structure time. It unfolds over time with a rhythm that slowly builds a foundation, gathers gradual momentum with preliminary peaks, culminates in a climax when the call to action 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. Most campaigns therefore devote an initial chunk of time to recruiting enough volunteers along the snowflake to create the “critical mass” that will allow them to reach out to get supporters on a large enough scale. This is what builds momentum. Like a snowball, each success contributes resources and capacity, 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.
Reaching a threshold that gives us new capacity is a “peak.” A peak isn’t simply a milestone on a strategic plan – it is a peak because it is a threshold that we are able to cross as a result of mobilizing the most resources we can to achieve it. Is it an unsustainable peak of effort – once we cross that peak, we can relax our effort briefly, assess, and then deploy our new resources to reach our next peak. An organizing strategy is necessarily built around a series of peaks, culminating in a final “mountaintop” peak when we have either achieved our goal or not.

Campaigns are not one-off events, but iterative, nested and fractal processes in which we use each action (or peak) as a way to build our capacity and test our theory of change. Is the opposition reacting? Are we building power over time by adding more people to our efforts? Each peak should have a measurable goal (number of people at rally, number of signatures on a petition, number of providers pledging support, etc.) that launch you forward towards your next peak. This way you know if you are succeeding or failing and can make adjustments to your approach based on observable data.

After each peak, your staff, volunteers and members need time to rest, learn, re-train and plan for the next phase. Often organizations say, “We don’t have time for that!”. Campaigns that don’t take time to reflect, adjust and re-train end up burning through their human resources and becoming more and more reactionary over time.
TEAMWORK: STRATEGY II

GOALS

• To decide on the tactics that can help you achieve your strategic goal.

• To put those tactics on a campaign timeline culminating in a peak.

AGENDA
TOTAL TIME: 55 MINUTES

As a team, you will brainstorm tactics that will help you achieve your strategic goal, sequence your tactics into peaks on a campaign timeline, and visualize your kickoff tactic.

1. Gather in your team. Choose a timekeeper and scribe. Review agenda and clarify concepts. 2 min

2. Review your theory of change & draft organizing sentence 5 min

3. What tactics can help you achieve the goal? On what timeline? Use the following worksheet to help you strategize. 25 min

4. Brainstorm and visualize your kickoff tactics using the worksheet. 20 min

5. Choose someone from your group to present your campaign timeline and the visualization of your kickoff to the larger group. Rejoin the larger group. 2 min
WORKSHEET: STRATEGY II, TACTICS AND TIMELINE

1. TACTICS & CAMPAIGN TIMELINE (TOTAL: 30 MIN)

STEP 1: BRAINSTORM TACTICS (15 MIN)
As a team, brainstorm as many tactics as you can in 15 minutes on flipchart paper. Your tactics should be based on your theory of change. How will you organize your constituency’s resources to create the change they want? Good tactics are based in the culture and experience of your people and reflect your values.

Then decide on the top three, using the following criteria: do they make good use of your resources? Do they build capacity? Do they help you to achieve your goal?

STEP 2: SEQUENCE TACTICS INTO PEAKS (15 MIN)
Strategize Backwards. How will you organize your tactics over time to achieve your strategic goal?

For each tactic, determine a peak goal—what would it look like to achieve it? A peak is typically an event or action with your constituency that shows all the capacity that’s been generated since the last peak. Starting at your strategic goal, work backwards to sequence your peaks on a campaign timeline (see example below).

Ensure that each peak builds on what came before so that you are gaining power and capacity over time, culminating in your strategic goal. What outcome do you want from each peak (for example, how many new people sign up or how many people participate in a march).
2. KICK-OFF TACTIC (TOTAL: 20 MIN)

STEP 1: BRAINSTORM KICKOFF TACTICS (10 MIN)

Strategize Forward. Now focus on your first peak: your campaign kickoff. What measurable outcome will you try to achieve with this first kickoff? How will the kickoff be motivational for your constituency? How will it reveal to your community its own resources, courage and solidarity?

Brainstorm as many tactics for your kickoff as you can in 10 minutes on a flipchart paper. Try to use “Yes, And!” strategizing, rather than “No, But!” Build on each other’s ideas. Then use your decision-making process to decide which tactic you will organize as a team.

STEP 2: VISUALIZE (10 MIN)

A. As a team, draw a picture of your kick-off tactic. What will it look like? When will it take place? Where? Who will be involved? How many? What will they be doing? What will they be wearing? What will you be doing? When?

OUR KICKOFF TACTIC VISUALIZATION:

B. Make a list of the things that need to get done between now and then in order to effectively organize your kick-off tactic:

•
•
•
•
REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
GOALS:

- Learn the basics of how public narrative works: values, emotion & story structure
- Learn criteria for an effective story of self and coach others on improving the storytelling
- Practice and receive coaching on one’s story of self

VALUES

What do stories have to do with social change?
The old thinking held that we became adults when we stopped making decisions on emotions and instead relied on objective reason. Current neuroscience and behavioural studies instead find that ‘reason is slave to the emotions’. If you take a moment to think about what brings you to this room, what gives you the courage to be here, it is not because of a list of facts. Rather, we’re called to this work by our moral beliefs and values. In order to lead and motivate others to join us then, we need to translate our shared morals and values into collective action. The most effective way to do that is by telling stories. We’ll be learning to telling stories using a method called Public Narrative.

Public Narrative allows us to communicate the values that motivate the choices that we make. Narrative is not talking “about” values; rather narrative embodies and communicates values. And it is through the shared experience of our values that we can engage with others, motivate one another to act, and find the courage to take risks, explore possibility and face the challenges we must face.

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.
**EMOTION**

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

Emotions inform us of what we value in ourselves, in others, and in the world. And it is through emotion that we can share what motivates us to lead / act. Stories enable us to communicate our feelings of what matters, not only our ideas of what matters. Stories are not abstractions or intellectualized theories, they are real lived experience that have the power to move others. We experience our values through our emotions.

Some emotions inhibit action, but other emotions facilitate 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, hope, YCMAD (you can make a difference), solidarity, and anger. Stories enable us to activate emotions that encourage mindful action to overcome the emotions that inhibit it. As the chart illustrates, while inertia – the security of habitual routine - can blind us to the signs of a need for action, urgency and sometimes anger get our attention. Fear can paralyze us, driving us to rationalize inaction, amplified by self-doubt and isolation, we may become victims of despair. On the other hand, hope can inspires us and, in concert with self-esteem (you can make a difference) and solidarity (love, empathy), can move us to act.
**STORY STRUCTURE**

What turns recounting an event into a story?
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 (we call this a ‘choice point’). The choice yields an outcome—and the outcome teaches a moral.

When we can empathetically identify with the character, we put ourselves in their shoes. We not only hear about someone’s courage; we feel the moral of their story and can be inspired by it.

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

**Incorporating Challenge, Choice, and Outcome in Your Own Story**

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 the first time you stood against injustice—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? How did it feel? 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?

**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.
PUBLIC NARRATIVE STRUCTURE

Public narrative is woven from three elements: a story of why I have been called, a story of self; a story of why we have been called, a story of us; and a story of the urgent challenge on which we are called to act, a story of now.

**Story of self - communicates the values that have called you to leadership.**

Telling one’s story of self is a way to share the values that define who you are -- not as abstract principles, but as lived experience. We construct stories of self around *choice points* -- moments when we faced a challenge, made a choice, experienced an outcome, and learned a moral. We communicate values that motivate us by selecting from among those choice points, and recounting what happened. Because story telling is a social transaction, we engage our listener’s memories as well as our own as we learn to adapt our story of self in response to feedback so the communication is successful.

Some of us may think our personal stories don’t matter, that others won’t care, or that we should talk about ourselves so much. On the contrary, if we do public work we have a responsibility to give a public account of ourselves - where we came from, why we do what we do, and where we think we’re going. In a role of public leadership, we really don’t have a choice about telling our story of self. If we don’t author our story, others will -- and they may tell our story in ways that we may not like. Not because they are malevolent, but because others try to make sense of who by drawing on their experience of people whom they consider to be like us.

The key is to focus on our choice points, those moments in our lives when we experienced the influence of our values on the choices we made that have 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 *courage of introspection* -- and of sharing some of what you find.

**Story of us - Communicates values that can inspire others to act in concert by identifying with each other – not only with you.**

Our stories of self overlap with our stories of us. We participate in many us’s: family, community, faith, organization, profession, nation, or movement. A story of us expresses the values, the experiences, shared by the us we hope to evoke at the time. A story of “us” not only articulates the values of our community; it can also distinguish our community from another, thus reducing uncertainty about what to expect from those with whom we interact. Social scientists often describe a “story of us” as a collective identity.xv

In a social movement, the interpretation of the movement’s new experience is a critical leadership function. And, like the story of self, it is built from the choices points – the founding, the choices
made, the challenges faced, the outcomes, the lessons it learned. 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 remind everyone of—or call everyone’s attention to—the values that you share against which challenges in the world can be measured.

**Story of now - Communicates an urgent challenge we are called upon to face, the hope that we can face it, and choices we must make to act.**

A story of now articulates an urgent challenge – or threat - to the values that we share that demands action now. What choice must we make? What is at risk? And where’s the hope?

In a story of now, we are the protagonists and it is our choices that shape the outcome. We draw on our “moral sources” to find the courage, hope, empathy perhaps to respond.

Simply put, Public Narrative says:

Here’s who I am, this is what we have in common, and here’s what we’re going to do about it.

**VIDEO REVIEW: TOMMY DOUGLAS – THE CREAM SEPARATOR**

We’ll be listening to Tommy Douglas telling a story of ‘the cream separator’ While you listen, think

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<thead>
<tr>
<th>SELF</th>
<th>US</th>
<th>NOW</th>
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<tr>
<td>What are his experiences and values that call him lead?</td>
<td>Who is the “us” that he identifies? What are the common values he appeals to? How?</td>
<td>What challenge to those values does he identify? What is his strategy to overcome this challenge? What is the first step that each person can take to be part of the solution?</td>
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WHAT WAS TOMMY DOUGLAS’S PURPOSE IN TELLING THESE STORIES? WHAT WAS HE MOVING PEOPLE TO DO?

WHAT VALUES DID HIS STORY CONVEY?

WHAT DETAILS OR IMAGES IN PARTICULAR REFLECTED THOSE VALUES?

WHAT WERE THE CHALLENGES, CHOICES AND OUTCOMES IN EACH PART OF HIS STORY? WHAT MORAL DO THE OUTCOMES TEACH?
TEAM BREAKOUT SESSION: STORY OF SELF

GOALS

• Practice telling your Story of Self and get constructive feedback

• Learn to draw out and coach the stories of others

AGENDA

TOTAL TIME: 45 MIN.

1. Gather in your team. Choose a timekeeper. Review agenda & work sheets. 1 min

2. Take some time as individuals to silently develop your “Story of Self.” Use the worksheet that follows. 10 min

3. As a team go around the group and tell your story one by one. 25 min
   For each person:
   2 minutes to tell their story 3 minutes to offer feedback from the group (use the worksheet that follows to write down your feedback)
   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.

4. Choose someone to tell their story of self to the larger group. Give that person a chance to share their story again, incorporating the coaching feedback, and then rejoin the larger group. 9 min
DEVELOPING YOUR STORY OF SELF

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

1. Why am I called to leadership? What is my purpose in calling on others to join me in action? What will I be calling on them to do? Focus on the major project on which you are working with your team. Why did you decide to tackle this specific social problem? What stories can you tell to answer these questions?

2. What values move me to act? How might they inspire others to similar action?

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

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

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<th>FAMILY &amp; CHILDHOOD</th>
<th>LIFE CHOICES</th>
<th>ORGANIZING EXPERIENCE</th>
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<td>Parents/Family</td>
<td>School</td>
<td>First Experience of organizing</td>
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<td>Growing Up Experiences</td>
<td>Career</td>
<td>Connection to key books or people</td>
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<td>Your Community</td>
<td>Partner/Family</td>
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<td>School</td>
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<td>Challenge</td>
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Powerful stories evoke images in the minds of your listeners that shape their understanding of you and your calling. Take people to a time and place. If you are stuck, try drawing pictures here instead of words.

Remember, articulating the decisions you make in the face of challenges is what ultimately communicates your values. Your audience understands you through what you do, not what you say or think. Remember to show who you are and what you learned instead of telling.

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<th>CHALLENGE:</th>
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FOR FURTHER REFLECTION

We all live rich and complex lives full of failures and successes, confronting many challenges and making many meaningful choices. We can never tell our whole life story in 2 minutes. Our challenge is to learn to interpret our life stories as a practice and choose relevant stories to tell from our own lives based on what’s appropriate in each unique situation.

Take time to reflect on your own public narrative, beginning with your story of self. You might go back as far as your parents or grandparents, or you might start with your most recent organizing and ask yourself why 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? Like a persistent 6 year old…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 on your own life?

What brings you to this campaign? When did you decide to work on improving education, for instance? Why? When did you decide to volunteer? Why? When did you decide to make the time to come to this workshop? Why?

Many of us active in public leadership have stories of both loss and hope. If we hadn’t experienced loss, we would not understand that loss is a part of the world and would have no reason to try to fix it. But if we hadn’t also experienced hope we wouldn’t believe it could be fixed.

A good public story is drawn from the series of choice points that structure the “plot” of your life – the challenges you faced, choices you made, and outcomes you experienced.

**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? 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?
COACHING TIPS: STORY OF SELF

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

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

DO coach each other on the following points:

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

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

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

“The challenge wasn’t clear. How would you describe ________?”

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

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

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

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

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

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

“Your story made me feel ________ because ________.”

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

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

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

“Try telling more details about ________ so we can imagine what you were experiencing.”
Record Feedback/Comments from Your Team Members Here:

**Coaching Your Team’s “Story of Self”:** 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.

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REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
The Story of Us

GOALS:

• Learn how to tell the story of our community in a way that reflects our shared values, hopes, and experiences

• Practice telling a Story of Us and get feedback on your story

THE STORY OF OUR COMMUNITY, THE 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 understand and 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 your constituency. The test of a story of us is whether or not they see themselves and each other in the story.

THE ‘CHARACTER’ IN THE STORY OF US IS THE PEOPLE YOU ARE MOTIVATING TO ACT.

Our communities have stories of their own. These include stories of our family, community, faith tradition, school, profession, movements, organizations, nations and, perhaps 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).

Telling a Story of Us requires learning how to put into narrative form experiences the “us” in the room recognize as their own and thus the shared values that motivate us all to action. 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 focused and rooted in the experience of the people in the room.
**NARRATIVE STRUCTURE: CHALLENGE, CHOICE, OUTCOME**

Remember the story structure we introduced in telling your Story of Self?

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

**The Challenge:** The challenges your 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 your community of what you’ve achieved. 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 the workshop – to take risks, to be open to learning, etc. – can become part of the Story of Us of the workshop.

**Stories of us can begin to shift power relationships by building new community and new capacity**

Often after we’ve heard others’ stories of self and we’ve started building relationships together we discover that we face similar challenges. We begin to understand that our challenges are rooted in deep systems of power inequality. Telling stories of us are a way to begin to join our stories together, acknowledge those shared challenges and the roots of the problem as a community. 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. Those stories give us hope that if we come together and take action as a community we can uproot the underlying causes of our suffering.
TEAM BREAKOUT SESSION: THE STORY OF US

GOALS

• Develop a Story of Us. Learn how to communicate the core values of the community you’re building that can inspire others to identify with each other in common action.

• Coach others’ stories by listening carefully, offering feedback, and asking questions.

AGENDA

TOTAL TIME: 45 MIN.

1. Gather in your team and choose a timekeeper.  
2 minutes

2. Take some time as individuals to silently brainstorm the “Us.” Use the worksheet that follows. How does your story relate to that of your peers in this program? What shared values do they evoke? Use the worksheet that follows.  
20 minutes

3. As a team, go around the group and tell your story one-by-one. Use the worksheet that follows as scratch paper for your feedback.  
2 minutes to tell your Story of Us,  
3 minutes to receive coaching from the group  
25 minutes

4. Choose someone to tell their story of us to the larger group. Give that person a chance to share their story again, incorporating the coaching feedback, then rejoin the larger group.  
5 minutes

The purpose of the Story of Us is to bring alive the values your audience shares with each other in a way that inspires collective action. Your goal is to tell a story that:

1. Evokes our shared values and what unites us,
2. Shows the challenge(s) we face that makes action urgent,
3. Gives us hope that we can make specific change together
WORKSHEET: THE STORY OF US

Use these questions to help you put together your Story of Us.

WHAT EXPERIENCES HAVE HAD THE GREATEST IMPACT ON ME AND MY TEAM?
WHAT VALUES MAKE YOU BELIEVE IN THIS GROUP OF PEOPLE?
WHAT STORIES REFLECT THOSE VALUES (CHOICES MAKE IN THE FACE OF CHALLENGES THAT REVEAL THOSE VALUES)?

WHAT IS THE CHALLENGE THAT OUR TEAM FACES? MAKE THE CHALLENGE REAL WITH IMAGES AND STORIES, NOT FACTS.

WHAT DOES OUR TEAM HOPE FOR? WHERE DOES THAT HOPE COME FROM? HOW DO WE KNOW THAT WE CAN MAKE CHANGE? WHAT WOULD THE WORLD LOOK LIKE IF WE WERE ABLE TO CREATE THAT CHANGE?

WHAT ABOUT THIS COMMUNITY WOULD INSPIRE OTHERS TO JOIN US TO FACE THIS CHALLENGE?
Now choose a few of the stories you brainstormed above to flesh out in vivid detail. Remember, you can use this space to draw pictures instead of writing words, to help you think about where to add detail and nuance in your story.

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<th>CHALLENGE:</th>
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<td>What was the challenge we faced? What’s the root of that challenge?</td>
<td>What specific choice did we make? What action did we take?</td>
<td>What happened as a result of our choice? What hope can it give us?</td>
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COACHING TIPS: THE STORY OF US

Remember to start with positive feedback FIRST and then move into what could be improved. **Focus on asking questions instead of giving advice.** The purpose is to coach, not judge or criticize; listen fully to offer ways that the storytelling could be improved.

**COACHING QUESTIONS**

**INTERWEAVING SELF AND US**: Did the story of self relate to the story of us? If so, what was the common thread?

**THE US**: Who is the “us” in the story? Do you feel included in the “us”?
“Could you focus more on the experiences we as a small group shared today that reflect our values? For instance, __________.”

**THE CHALLENGE**: What specific challenges has this community faced? Were those challenges made vivid?
“I understood the challenge to be ________. Is that what you intended?”

**THE CHOICE**: Was there a clear choice that was made in response to each challenge? How did the choice make you feel? (Hopeful? Angry?)
“To me, the choice you made was _______, and it made me feel ________.”

**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 taught me ________.”

**THE VALUES**: Could you identify what this community’s values are and how this community has acted on those values in the past? How?
“Your story made me see that we value ________ because ________.”

**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 feel what you were feeling.”
**WORKSHEET: COACHING YOUR TEAMMATES’ STORIES OF US**

Record Feedback/Comments from Your Team Members On Your Story Here:

*Coaching Your Team’s “Story of Us”*: 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.

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REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
The Story of Now

GOALS:

• Learn how the Story of Now moves us to action

• Practice telling a story of now and get feedback on your story

THE STORY OF NOW

The Story of Now describes an urgent choice faced by the “us” you hope to mobilize to act. This story is a challenging vision of what will happen if it does not act, a hopeful vision of what could be if it does act, and a call to commit to the action required. A story of now makes the bridge from story – why we should act – to strategy – how we can act effectively.

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. 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 the ‘us’..

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 a way to address the problem, aren’t good leaders. If you are called to address a real challenge, a challenge so urgent you have motivated us to face it with you, then you also have a responsibility to invite us to join you in its solution. A “story of now” is not simply a call to make a choice to act – it is a call to “hopeful” action.

Even the most skilled leaders cannot make others decisions for them. Leaders are not in business of coercion. We can light a credible path forward but the choice to take action is made by each individual in the room. The Story of Now illuminates an opportunity for each and everyone one of ‘us’ to be heroes in the story, to heed the call and take effective action as empowered agents of change.

Tips*

Your story of now should reflect your ‘Theory of Change’ and present a credible path to victory. Have you ever been called upon to lead only to be asked to simply sign a petition? Will the challenges we and our community face be solved by signing that one petition? Opportunities to share our public narrative are precious. Be sure to map the trajectory and how this one important and meaningful action will move your constituency closer to their goal of uprooting the underlying causes of our suffering.
TEAM BREAKOUT SESSION: STORY OF NOW

GOALS

• Develop a story of now with a clear and urgent challenge, a detailed vision for the future, and specific choice point for your audience to make.

• Learn how to focus on a choice to act with others to achieve strategic purpose.

NOTE: It's more than an “ask.” It's a choice about whether someone’s going to stay on the sidelines or dive in. It's an opportunity for them to join with you.

AGENDA

TOTAL TIME: 45 MIN.

1. Gather in your team. Choose a timekeeper. Review agenda. 1 min

2. Take some time as individuals to silently develop your “Story of Now” that is rooted in your group’s project. Use the worksheet that follows. 10 min

3. As a team, go around the group and tell your story one by one. 25 min
   2 minutes to tell their Story of NOW
   3 minutes to offer feedback from the group

4. Choose someone to tell their story of now to the larger group. Give that person a chance to share their story again, incorporating the coaching feedback. Rejoin the larger group. 9 min
WORKSHEET: DEVELOPING YOUR STORY OF NOW

Use these questions to help you to put together your Story of Now or Call to Action. Draw images, rather than just using words to help you create a vivid, detailed story.

CHALLENGE: What is the problem your constituents face? Why is it urgent to organize now? What stories or images can you convey to make the challenge real for your listeners?

OUTCOME: What will the future look like if we fail to act? What could the future look like if we do act? How do you know? Can you think of examples of hope that have already happened? Paint pictures with vivid details as Martin Luther King, Jr. did in his “I Have A Dream” speech. Include the “nightmare” and the “dream”. This is your motivating vision.

CHOICE: What choice are you asking people to make? What form will their commitments take? Is it clear what they can do with you today … right now? Is it believable that if they make the choice it can help lead to the vivid image of a hopeful outcome you painted?
COACHING TIPS: STORY OF NOW

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

DO coach each other on the following points:

THE CHALLENGE: What is the specific challenge we face now? Did the storyteller paint a vivid and urgent picture of it? What details might make it even more vivid and urgent?
“‘The challenge wasn’t urgent enough. Why not mention _______?’”

THE OUTCOME: What is the specific outcome if we act together? Is there a clear and hopeful vision of how the future can be different if we act now?
“‘The outcome could be even more hopeful if you described _______.’”

THE CHOICE: Is there a clear choice that we are being asked to make in response to the challenge? How did the choice make you feel? (Hopeful?)
“‘What exactly are you asking us to do? When should we do it? Where?’”

VALUES: What values do you share with the storyteller? Does the story of now appeal to those values?
“‘Instead of telling us to care, it would be more effective if you showed us the choice to be made by illustrating the way in which you value _______.’”

DETAILS: Were there sections of the story that had especially vivid details or images (e.g. sights, sounds, smells, or emotions)?
“‘The image of _______ really helped me feel what you were feeling.’
“‘Try telling more details about _______ so we can relate to this shared experience.’”
Record Feedback/Comments from Your Team Members Here:

_Coaching Your Team’s Story of Now -_ 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.

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REFLECTION AND DEBRIEF

WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
GOALS:

• Weave your Stories of Self, Us and Now into a Public Narrative

• Practice and receive coaching on your Public Narrative

WEAVING

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.
TEAM BREAKOUT SESSION:
LINK SELF / US / NOW & ASK FOR COMMITMENT

GOALS

• Practice integrating your stories of self, us & now into a public narrative

NOTE: It’s more than an “ask.” It’s a choice about whether someone’s going to stay on the sidelines or dive in and act on their values. It’s an opportunity for them to join with you.

AGENDA
TOTAL TIME: 1.5 HRS.

1. Gather in your team. Choose a timekeeper. 1 min
2. Take some time as individuals to silently develop your Public Narrative. Use the worksheet that follows. 10 min
3. Gather in your small group to practice your public narrative. Practice telling your public narrative for 3 minutes with 2 minutes feedback. Be sure that you end by asking for a clear commitment that is rooted in your team’s project and your strategy. Each person has 5 minutes to tell their story and 2 minutes for feedback. 25 min
4. Rejoin the larger group. Everyone gets a chance to share their public narrative with the whole group. 1 hr.
**WORKSHEET: LINK SELF / US / NOW & ASK FOR COMMITMENT**

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<td>Which choices in your life led you to be here today? Pick 1 or 2 that relate to this community and this moment.</td>
<td>What is this community all about?</td>
<td>What challenges make you angry enough to act?</td>
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<td>It can help to start with who you are and where you come from?</td>
<td>What stories reveal that? Look back at your story of us.</td>
<td>What gives you hope (possible future, things we’ve done in the past, current moment’s opportunity)?</td>
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<td>What coaching did you get that would help your story of us come alive?</td>
<td>What specific coaching did you get that would help your story of us come alive?</td>
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<td>What specifically moves you about this group?</td>
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**THEME – AS YOU LOOK AT YOUR ANSWERS ABOVE, WHAT THEME EMERGES? IS IT “OVERCOMING INJUSTICE”? PERSEVERANCE?**
COACHING TIPS: PUBLIC NARRATIVE

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

THE CHALLENGE: What is the specific challenge we face now? Did the storyteller paint a vivid and urgent picture of it? What details might make it even more vivid and urgent? “The challenge wasn’t urgent enough. Why not mention ________?”

THE OUTCOME: What is the specific outcome if we act together? Is there a clear and hopeful vision of how the future can be different if we act now? “The outcome could be even more hopeful if you described ________.”

THE CHOICE: Is there a clear choice that we are being asked to make in response to the challenge? How did the choice make you feel? (Hopeful?) “What exactly are you asking us to do? When should we do it? Where?”

VALUES: What values do you share with the storyteller? Does the story of now appeal to those values? “Instead of telling us to care, it would be more effective if you showed us the choice to be made by illustrating the way in which you value ________.”

DETAILS: Were there sections of the story that had especially vivid details or images (e.g. sights, sounds, smells, or emotions)? “The image of ________ really helped me feel what you were feeling.” “Try telling more details about ________ so we can relate to this shared experience.”

INTERWEAVING SELF, US AND NOW: Did the story of self and the story of us relate to the story of now? If so, what was the common thread? If not, what thread could the storyteller use to rethink the connections between self, us and now?
Record Feedback/Comments from Your Team Members Here:

**Coaching Your Team’s Public Narrative** - As you hear each other’s public narratives, 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 public narratives.

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WHAT WORKED IN THIS SECTION? WHAT WERE THE ‘ROSES’?

WHAT DIDN’T? WHAT WERE THE ‘THORNS’?

WHAT TWO THINGS WILL YOU TAKE AWAY? WHAT DID YOU LEARN?

GENERAL REFLECTIONS:
HOW DO I PRIORITIZE WHO TO COACH IN ORGANIZING?

When you have several individuals or teams to coach, where do you start? Where do you put most of your energy to get the best outcomes?

Invest your first coaching effort in those who are doing the best work. This seems counterintuitive, but the purpose of coaching is not just to fix problems – it’s to help people achieve excellent outcomes.

Coaching your most innovative, productive people first maximizes their productivity, and preps you to coach others by giving you a detailed understanding of what excellent work looks like in practice. And if your best folks get even better, they can help you coach and support their peers.

Next, coach those who are showing promise. With what you’ve learned from the strongest groups, move on to those who are doing good work and help them make the leap to great. Utilize the tips in the 5 Step Coaching Process section for choosing interventions to help you tailor your coaching.

Finally, focus on the individuals and teams who are struggling. Watch these folks in action before jumping to conclusions. Are they struggling because of contextual factors, like a lack of resources, or because of inadequate skill or effort? Try investing a little more (resources, training or support), and see if outcomes improve. If so, great, keep coaching! If not, then assess whether this person is in the right role. Whether you’re coaching staff or volunteers, making sure the right people are in the right roles based on their skill and passion is a basic form of respect. While it’s painful for all involved in the short term, helping someone move on from a role that’s not well suited for them will only help everyone in the long term.

Be careful to set boundaries on your coaching with those who are struggling the most so that you continue to spend time and energy to keep your excellent folks going strong, and your good folks getting better.
How do I coach organizers to learn from failure?

In her book, *Mindset*, Carol Dweck argues that we all tend toward one of two mindsets: fixed or growth. The fixed mindset claims we’re born with our basic qualities, like intelligence or talent, which can’t improve or change (so why try?). Ever heard someone give a poor presentation, then say, “I’m not a good public speaker”? That’s a fixed mindset.

The growth mindset asserts that we can develop our abilities through dedication and hard work. Our job as coaches is to cultivate a growth mindset in those we’re coaching. That requires learning to look directly at failure and understand it so we can improve.

Here are some tips for learning from failure, while striving for success:

**Create a culture of debriefing.** Before work begins, schedule time to debrief into every step. Make time after every event or project to evaluate what worked, what didn’t, and articulate key learnings together. Require short written reflection on major projects, especially those that fall short.

**Differentiate between actions and context.** It’s easy to hold someone responsible for every outcome. But success and failure are a combination of individual actions and situational context. As you develop a learning relationship with the person you’re coaching, pay close attention to the details. When does one action lead to success? Under what conditions does the same action lead to failure? Success requires constantly evaluating the context and adapting our behavior to maximize good outcomes.

**Interpret what happened.** Coach the person you’re working with to interpret failure with clear eyes. Hiding failure or pretending it was success doesn’t fool anyone. Show those you coach that interpreting failure is an integral part of winning. Check out Barack Obama’s speech after his New Hampshire primary loss for a great example of interpreting failure in a way that stays focused on driving for success (http://www.youtube.com/watch?v=Fe751kMBwms).

**Get back out there!** Who wants to wallow in failure? Encourage those you coach to get out there and try again!