ORGANIZING: PEOPLE, POWER, CHANGE
Acknowledgements

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Hello and welcome!

The following guide aims to support you in developing your capacity for effective community organizing. Our goal is to provide you with an introduction to organizing and encourage you to explore answers to the following questions:

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

To start, here's how we define **leadership:**

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

Here's how we define **organizing:**

> Organizing is leadership that enables people to turn the resources they have into the power they need to make the change they want.

And we break down this definition further by describing the **five key leadership practices of organizing:** telling stories, building relationships, structuring teams, strategizing, and taking action. Taken together, these five practices form the basis of the organizing framework laid out in this guide. We'll refer to the above definitions throughout the guide, and unpack what they mean in depth as we work through the organizing framework. **But where does this ‘framework’ come from?**

Much of this framework was codified by a fellow called Marshall Ganz. Ganz developed the “Public Narrative” framework (see the Telling Stories section, pg. 17) based on years of organizing in, and research on, social movements. He cut his teeth as a young organizer in the Civil Rights movement, worked with the United Farm Workers in the 1960s and 70s, advised many unions, non-profits, and political organizations for decades, and was a key trainer and
organizing strategist behind the U.S. presidential campaigns of 2008 and 2012.

It was during these campaigns that Ganz and fellow organizers (note: millions of other organizers) built on community organizing best practices and techniques from past movements and codified an approach to grassroots organizing and training that many credit with winning the 2008 US election. Many organizations, including the Leading Change Network and training programs at Wellstone Action, spawned or grew out of these successful campaigns. Neither Ganz or the Leading Change Network invented this framework. Rather, it was written down as an embodiment of what organizers around the world were already doing. Most of this guide is adapted from those resources.

Many people and organizations paid close attention to what these American organizers were doing, and some were inspired to shift their approach and adapt this framework. Over the last several years, several organizations in Canada have begun to shift their strategies to focus on community organizing (that is, putting people and relationships at the centre of the work), modelled after Ganz and American campaigns. That’s not to say that local movements or organizations haven’t been working in this relationship-based way for a long time; they just might not take inspiration from the work of Marshall Ganz or credit themselves as ‘organizers’ in the same way.

As those organizations in Canada have put this framework at the centre of their work, adaptations have been made to it to be more relevant to their organizational context and the unique organizing context faced by progressive social change organizations in Canada. This guide, now in its 5th Canadian edition, represents the most recent iteration of this evolving framework.

Some call this framework the “snowflake model,” others “the Ganz model”, and in BC it’s most often called “engagement organizing”. Whatever we choose to call it, we hope to emphasize that this approach is based in years and years of community organizing - we’re truly ‘standing on the shoulders of giants’ employing this organizing framework today.
In reading this guide, we ask that you keep two things in mind:

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

2. This organizing framework is just that, a **framework, not a formula**. Our goal here is to present some concepts and tools that many organizers have found to be effective and, at times, have been instrumental in winning campaigns.

We hope you find it useful.

Sincerely,

Anna McClean and Peter Gibbs, Victoria, BC, Territory of the Songhees and Esquimalt Nations
August 2017

“A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.”

– Lao Tzu
Intro to Organizing

Key Concepts

- **Mobilizing** and **organizing** are two key approaches to creating change.
- Organizing is **leadership** that enables people to turn the resources they have into the power they need to make the change they want.
- Organizing is a practice, and there are **five key leadership practices** within this practice: telling stories, building relationships, structuring teams, strategizing, and taking action.
- The first question an organizer asks is “**who are my people?**” not “what is my issue?”
- Strong **relationships** are the foundation of successful organizing efforts.
- The **snowflake model** is an organizational structure that embodies leadership as that which enables others to achieve shared purpose in the face of uncertainty.

What is Organizing?

Organizing is **leadership** that enables **people** to turn the **resources** they have into the **power** they need to make the **change** they want. As we’ll learn throughout this guide, community organizing is all about people, power, and change – it starts with people and relationships, is focused on shifting power, and aims to create lasting change. Organizing people to build the power to make change is based on the mastery of five key leadership practices: telling stories, building relationships, structuring teams, strategizing, and taking action. That is, to develop our capacity for effective community organizing, we must learn the **five leadership practices**.
The Five Leadership Practices

1. **Telling stories** of why we are called to lead, a story of the community we hope to mobilize and why we’re united, and a story of why we must act.
2. **Building relationships** as the foundation of purposeful collective actions.
3. **Structuring leadership** in a way that distributes power and responsibility and prioritizes leadership development.
4. **Strategizing** to turn your resources into the power you need to achieve clear goals.
5. Translating strategy into **taking action** that is measurable, motivational, and effective.

Though organizing is not a linear process, organizers use the first three practices (telling stories, building relationships, structuring teams) to build power within a community, while the last two practices (strategizing and taking action) are about wielding that power in order to create change.

**The Organizer’s Journey**

The Organizer’s Journey is one way to conceptualize the five leadership practices in action. In the cartoon below, the organizer notices that the houses in a neighbourhood are in disrepair. They begin by approaching members of their community and telling stories about why this matters to them personally and to their community, and that if they work together, they can fix the houses.

Next they use the story of the problem and change they want to make as a foundation for building relationships within their community. Once they have recruited enough people they launch a leadership team and start strategizing.

The team will set a goal and the best strategy, weighing whether to fix the houses themselves, or to pressure their local government to invest in fixing them. Once they have a goal and a strategy, they decide how to structure their team to reach their goal. And finally, they will put their strategy into practice by taking action and mobilizing their people to use their tactics to implement their strategy.

While the Organizer’s Journey makes this all seem linear, it’s not. While it’s always a good idea to start with stories, you never stop telling stories. Likewise, you don't stop building relationships once you have a strategy. Rather, each of these practices is used iteratively, over and over again until you reach your goal.
Mobilizing & Organizing

Organizing is leadership that enables your people to turn their resources into the power they need to make the change they want. Mobilizing is leadership that focuses on leveraging that capacity and power through immediate action. Understanding the differences between two main approaches, their limitations, and how they complement each other can help us more effectively approach a campaign.

<table>
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<th>Mobilizing</th>
<th>Organizing</th>
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<tr>
<td>Strategy for building power</td>
<td>Builds power by building membership; take people where they are</td>
<td>Build power by building leadership; transform motivations and capacities of members to take on more leadership</td>
</tr>
<tr>
<td>Strategy for building membership</td>
<td>Build membership by getting as many people as possible to take actions; build a bigger, more targeted prospect list</td>
<td>Build membership by developing leaders who can engage others; constantly develop leadership among new prospects</td>
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<tr>
<td>Implications for structure</td>
<td>Centralize responsibility in the hands of staff or a few key volunteers</td>
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<td>Implications for types of asks made to volunteers</td>
<td>Focus on discrete requests that often allow people to act quickly or alone</td>
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<td>Implications for communications with volunteers</td>
<td>Focus on reaching out to as many people as possible by developing attractive “pitches” that will draw in the most people and new networks</td>
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<td>Implications for support</td>
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This table based on How Organizations Develop Activists by Hahrie Han.

Both are important in creating change; however, some campaigns only use mobilizing to create actions without using organizing to increase capacity. If you
skip the first three leadership practices (telling stories, building relationships and structuring teams) and go right to strategizing and taking action, you are probably just mobilizing.

If you only organize, your efforts will be deep but narrow. If you only mobilize, your efforts will be broad but shallow. Effective campaigns blend them both to achieve a combination of breadth and depth.

**People**

The first question an organizer asks is “Who are my people?” not “What is my issue?” Effective organizers put people, not issues, at the heart of their efforts. Organizing is not about solving a community’s problems or advocating on its behalf. It is about enabling the people with the problem to mobilize their own resources to solve it (and keep it solved).

Identifying who you are organizing is just the first step. The job of a community organizer is to transform a community of people who share common values or interests into a community of people who are standing together to realize a common purpose.

For example, an organizer would move a community of undocumented people worried about being deported when they go to the hospital to take action by organizing a campaign to make hospitals safe spaces for undocumented people.

**Power**

Organizing focuses on power: who has it, who doesn’t, and how to build enough of it to shift the power relationship and bring about change. Dr. Martin Luther King described power as “the ability to achieve purpose” and “the strength required to bring about social, political and economic change.”

In organizing, power is not a thing or a trait. Organizers understand power as the influence that’s created by the relationship between interests and resources. Here, **interests** are what people need or want (e.g. to protect a river, to stay in

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public office, to make money), while resources are assets (e.g. people, energy, knowledge, relationships, votes, and money) that can be readily used to achieve the change you need or want. Understanding the nature of power – that it stems from the interplay between interests and resources – and that we must shift power relationships in order to bring about change, is essential for the success of our organizing efforts.

From the example above, the community organizing to make hospitals safe spaces for undocumented people may ask questions aimed at ‘tracking down the power’ – that is, inquiring into the relationship between actors, and particularly the interests and resources of these actors in their struggle. For instance, they might ask questions like: what are our interests, or, what do we want? Who holds the resources needed to address these interests? What are their interests, or, what do they want?

In doing so, the community may realize that the local health authority is a key actor, that several health authority board members in this community have ambitions to run for political office and so value their public image, and in turn, the community holds the resources of people, relationships in the community and with the media, and an ability to tarnish their image that could shift this power relationship and bring about change.

**Change**

In organizing, change must be specific, concrete, and significant. Organizing is not about raising awareness, researching, or speech-making (though these may contribute to an organizing effort). It is about specifying a clear goal and mobilizing your resources to achieve it.

Indeed, if organizing is about enabling others to bring about change, then it’s critical to define exactly what that change is by setting clear measurable goals.

In the case of the example campaign from above, the community seeking to make hospitals safe spaces for undocumented people must create clear, measurable goals. Note the difference between “our goal is for hospitals to be safe for undocumented people” versus “our goal is to enact a policy stating that hospital staff may not report the immigration status of a patient to Canadian Border Services Agency (CBSA), and CBSA officers are not permitted in the hospital.”

You’ll learn how to come up with goals in the Strategizing section (pg. 56) and how to achieve them in the Taking Action section (pg. 66).
The Snowflake Model: A distributed approach to leadership

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

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

Second, the snowflake model is based, above all, on enabling others. A movement’s strength stems from its capacity and commitment to develop leadership - in the snowflake model, everyone is responsible for identifying, recruiting, and developing leaders. Leaders develop other leaders who, in turn, develop other leaders, and so on.
You’ll learn about the snowflake model in greater detail in the Structuring Teams section (pg. 48), but for now, reflect on the organizational structures that you’ve been a part of in your work, school, or other areas of your life. How might you draw out those structures? Where did you fit into those structures, and how did you feel in your role?

Now, take a look at the diagram. Note the faces, the clusters of faces, and the links between them. How might the snowflake model compare to the structures you’ve been a part of in the past? As you’ll see in the Structuring Teams section, the snowflake model is unique from typical organizing or leadership structures in that responsibility is distributed and it prioritizes leadership development above all.

**Jemez Principles for Democratic Organizing**

As we organize, we want to ensure that we are not replicating the injustices we are trying to address in the world within our own organizing work. The Jemez Principles, written during the height of the anti-globalization movement over 20 years ago, are a foundational resource and guide for organizers in that endeavor. The following is taken directly, and in its entirety, from the original resource, produced by Southwest Network for Environmental and Economic Justice:

On December 6-8, 1996, forty people of color and European-American representatives met in Jemez, New Mexico, for the “Working Group Meeting on Globalization and Trade.” The Jemez meeting was hosted by the Southwest Network for Environmental and Economic Justice with the intention of hammering out common understandings between participants from different cultures, politics and organizations. The following “Jemez Principles” for democratic organizing were adopted by the participants.

The meeting was hosted by Southwest Network for Environmental and Economic Justice (SNEEJ).

**#1 Be Inclusive**

If we hope to achieve just societies that include all people in decision-making and assure that all people have an equitable share of the wealth and the work of this world, then we must work to build that kind of inclusiveness into our own movement in order to develop alternative policies and institutions to the treaties policies under neo-liberalism.

This requires more than tokenism, it cannot be achieved without diversity at the planning table, in staffing, and in coordination. It may delay achievement of other important goals, it will require discussion, hard work, patience, and advance planning. It may involve conflict, but through this conflict, we can learn
better ways of working together. It’s about building alternative institutions, movement building, and not compromising out in order to be accepted into the anti-globalization club.

**#2 Emphasis on Bottom-Up Organizing**

To succeed, it is important to reach out into new constituencies, and to reach within all levels of the leadership and membership base of the organizations that are already involved in our networks. We must be continually building and strengthening a base which provides our credibility, our strategies, mobilizations, leadership development, and the energy for the work we must do daily.

**#3 Let People Speak for Themselves**

We must be sure that relevant voices of people directly affected are heard. Ways must be provided for spokespersons to represent and be responsible to the affected constituencies. It is important for organizations to clarify their roles, and who they represent, and to assure accountability within our structures.

**#4 Work Together In Solidarity and Mutuality**

Groups working on similar issues with compatible visions should consciously act in solidarity, mutuality and support each other’s work. In the long run, a more significant step is to incorporate the goals and values of other groups with your own work, in order to build strong relationships. For instance, in the long run, it is more important that labor unions and community economic development projects include the issue of environmental sustainability in their own strategies, rather than just lending support to the environmental organizations. So communications, strategies and resource sharing is critical, to help us see our connections and build on these.

**#5 Build Just Relationships Among Ourselves**

We need to treat each other with justice and respect, both on an individual and an organizational level, in this country and across borders. Defining and developing “just relationships” will be a process that won’t happen overnight. It must include clarity about decision-making, sharing strategies, and resource distribution. There are clearly many skills necessary to succeed, and we need to determine the ways for those with different skills to coordinate and be accountable to one another.
#6 Commitment to Self-Transformation

As we change societies, we must change from operating on the mode of individualism to community-centeredness. We must “walk our talk.” We must be the values that we say we’re struggling for and we must be justice, be peace, be community.

This and other environmental justice documents can be downloaded from: www.ejnet.org/ej/

Further Reading


Note: This resource is not explicitly related to organizing or campaigning, and organizers wanting to embody the Jemez Principles can get a lot from reading it with their own work in mind.


Telling Stories

Key Concepts

• We tell stories in organizing to communicate values and to motivate people to take action.
• A story comes alive when the character faces a challenge, makes a choice, and experiences the outcome.
• The Public Narrative framework is comprised of a Story of Self, a Story of Us, and a Story of Now
• Learning to craft and recraft your Public Narrative is a leadership practice.

Storytelling in Organizing

We turn to storytelling in organizing to answer the question of “why?” – why we care, why the work that we do matters, why we value one goal over another. Most of us don’t do this work because of a list of facts, and rattling off statistics isn’t usually an effective means of recruiting ordinary people to stand up against injustice. Instead, we’re here because of our values; the desire to make change stems from beliefs like fairness, equality, democracy, and environmental sustainability.

Storytelling allows us to communicate our values, and in organizing, we use stories to articulate our shared values. Stories can be a source of inspiration, a means to engage and connect with one another, and, most importantly, a way to motivate others to join us. That is, in order to motivate others to join us in making change, we need to identify and articulate our shared values in ways that spur us to take action together. The most effective way to do that is by telling stories.

Remember that storytelling is not synonymous with ‘speech-making.’ It is a practice we use in many different contexts, not just from a stage at a rally. For example, stories are told when recruiting a new team member, or when debriefing with a volunteer who had a hard shift. Specifically, an organizer may ask a new team member – why did you choose to get involved in this campaign? or
can you tell me more about why you’re here today? – in order to hear a little of the volunteer’s story. In turn, the organizer might share a bit of their story for the purpose of building connection, and, hopefully, motivating the volunteer to take further action on the campaign.

Each of us can learn to tell a story that can move others to action. We all have stories of challenge and of hope or we wouldn’t think the world needed changing or think that we could change it. The trick is to articulate a story that communicates the values that have called us to leadership, the values that unite us, and the challenges that we must overcome together. In this section, we’ll explore a framework for storytelling called Public Narrative that revolves around those three elements – a Story of Self, Us, and Now.

**Emotions**

The key to motivation is understanding that values inspire action through emotion. Stories enable us to communicate our feelings about what matters, so compelling stories are not overly abstract or intellectual. They’re about real-life experiences that have the power to move others.

Again, storytelling in organizing is all about inspiring action, and leaders must learn to mobilize the emotions that make agency possible. As the diagram illustrates, some emotions inhibit action, while other emotions facilitate action. Action is inhibited by feelings of inertia, apathy, fear, isolation, and self-doubt, while action is facilitated by feelings of urgency, anger, hope, solidarity, and the feeling that “you can make a difference” (or, Y.C.M.A.D.).
For instance, fear can paralyze us and drive us to rationalize inaction. Amplify this fear by feelings of self-doubt and isolation and people become victims of despair. On the other hand, hope can overcome fear, and in concert with self-esteem (Y.C.M.A.D.) and love (solidarity), these emotions can move us to act.

One way to evoke emotions in stories is to show rather than tell. Where possible, paint a picture of your experience, describing the details of what you experienced and felt, instead of just making a statement of facts. Notice the difference between the following two statements:

“When I heard the election result, I was really upset”
“I was sitting on the couch in my living room with my partner watching the election results come in on my laptop. When the news announcer called the election, and that red banner came across the screen, I felt a little sick. I turned to look at my partner and they had this shellshocked expression on their face.”

The second statement gives the listener the ability to empathize and feel the emotions the storyteller was feeling.

Effective storytellers learn how to adapt their stories to different audiences by tapping into the emotions their listeners are feeling at the time, and then evoking motivating emotions they deem timely or relevant to motivate them to act.

That said, while action-motivating emotions can help someone resist the action-inhibiting emotions, it does not erase them, particularly if the issue at hand is one of ongoing marginalization. Storytelling can help a person take action by resisting the blocks that inhibiting emotions can put up; it does not mean that they go away.

**Structure: Challenge, Choice, Outcome**

If you reflect on stories you’ve heard or remember most vividly, you’ll probably notice that stories have similar structural elements. That is, a story is usually crafted of just three things: plot, character, and moral.

But what makes a story a story, rather than the recounting of an event? **Challenge, choice, and outcome.** A story begins with a challenge that confronts a character and demands that they make a choice, and this choice yields an outcome. Stories capture our
interest when the character meets an unexpected challenge; listeners lean in when presented with tension, uncertainty, or the unknown. Challenges, choices, and outcomes are the structural elements that make stories come alive.

Remember, our stories are about people. The storyteller engages an audience when they make them identify with the character in the story. As a storyteller, the goal is to create empathy between listener and character so that, hopefully, listeners are encouraged to think about their own challenges and choices. Even further, the goal is to get listeners to experience or feel the outcome of the character’s choices (a ‘lesson of the heart’) and not just understand it (a ‘lesson of the head’). The choices in our stories communicate the values the characters in the story hold.

Public Narrative

The Public Narrative framework is based on stories that have been told by social movement leaders for generations. Through public narrative, social movement leaders – and participants – can move to action by mobilizing sources of motivation, constructing new shared individual and collective identities, and finding the courage to act.

The Public Narrative framework is made up of three components: a Story of Self, a Story of Us, and a Story of Now. A Story of Self communicates the values that have called you to leadership; a Story of Us communicates the values shared by those in action; a Story of Now communicates an urgent challenge to those values that demand action now and articulates how you are going to act on them.

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 our problem.” By mastering the practice of crafting a narrative that bridges the self, us, and now, organizers enhance their own efficacy and create trust and solidarity with their community.
Story of Self

Telling your Story of Self is a way to communicate who you are, the choices that have shaped your identity, and the values you hold that influenced those choices. Learning to tell a compelling, emotive Story of Self demands the courage of introspection, and even more courage in sharing what you discover.

We construct our stories of self around “choice points” – moments when we faced a challenge, made a choice, experienced an outcome, and learned a lesson. Ask yourself: when did I first care about being heard? When did I first experience injustice? When did I feel I had to act, and what did I do?

Once you identify a specific, relevant choice point, dig deeper and ask yourself: what was the outcome of this choice and how did it feel? What did it teach me?

Some of us may think that our personal stories don't matter or that others won't care to hear them. Yet if we do community or social change work then sharing our stories can be a powerful to communicate our values and call others to join us – where we come from, why we do what we do, and where we think we're going. What's more, if we don't author our own stories, others might do it for us (and in ways we may not like).

In developing your Story of Self, reflect on these questions in relation to the issue or campaign you are working on:

1. Why am I called to leadership?
2. Why did I decide to tackle this specific injustice or problem and work on this organizing effort?
3. What values move me to act? Have these values always been important to me? If not, when did that change? How might these values inspire others to similar action?
4. What stories can I tell from my own life about specific people or events that would show, rather than tell, how I learned or acted on those values?

For more help with developing your Story of Self and full Public Narrative see the “Developing your Public Narrative” worksheet in the Appendix (pg. 74).
Story of Us

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

A Story of Us brings the values of the Us alive.

While there may appear to be obvious commonalities amongst your Us (e.g. they live in the same community, they work for the same employer, they have the same gender), the Story of Us is about going deeper and asking what are the shared values and experiences that the Us shares. Those values and experiences may come from those commonalities (e.g. a group of people living in a community facing an affordability crisis will likely have common experiences). Ultimately, it is about the experience of sharing values with others “in the room”.

For example, an organizer giving a speech to a rally may ask themselves, “What values unite the audience at this rally? What experiences have we shared collectively that embody those values. As a community, what choices have we made to enact those values?”

Or, an organizer conducting a 1:1 meeting with a new volunteer (see the Building Relationships section on pg. 33 for more on what that is) may ask questions to discover what values and experiences they have in common, and tell a story of a time in their life that connects those shared values to that of the volunteer.

Finally, an organizer hosting a house meeting might ask each person in attendance to share a story about why the campaign is important to them. As they listen to these stories, they could ask themself “What values connects all of these stories together? What experiences has our community shared that embody these values? As a community, what choices have we made to enact those values?” Then when the organizer tells their story, they may craft a Story of Us which incorporates the answers to those questions.

Similar to a Story of Self, a Story of Us focuses on choice points, but this time the character in your Story of Us is the community you are motivating to act. Like the Story of Self, it is built from the choice points – the origin, the challenges faced, the choices made, the outcomes, the lessons learned. That said, a compelling Story of Us doesn’t just highlight challenges; it also lifts up stories of success to give people hope. As Ganz writes, “Hope is one of the most precious gifts we can give each other and the people we work with to make change.”

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We participate in many Us's. Each time you craft a Public Narrative, the Us will change, and so your Story of Us will change to reflect the values and experiences of your audience.

In developing your Story of Us, reflect on these questions:

1. What values do you share with this community? (note: community here is the ‘us’ in your story)
2. What experiences have had the greatest impact on this community?
3. What challenges has this community faced?
4. What challenge is this community currently facing and what choice must they make?

For more help with developing your Story of Us and full Public Narrative see the “Developing your Public Narrative” worksheet in the Appendix (pg. 74).

**Story of Now**

A Story of Now articulates the urgent challenge your ‘Us’ faces and the threat to your shared values that demands immediate action. In your Story of Now, paint the picture of what the future looks like if we fail to act now (the ‘nightmare’) and what the future could be like if we act together (the ‘dream’).

Lastly, a Story of Now makes the bridge from story, why we should act, to strategy, how we can act. Specifically, your Story of Now should end with a “hard ask” (see the Building Relationships section (pg. 30) for what that is). It’s up to you to both motivate your listeners to take action and give them a specific, concrete way to take action.

http://www.sojo.net/magazine/2009/03/why-stories-matter
In developing your Story of Now, reflect on these questions:

1. What is the urgent challenge your ‘us’ faces?
2. What change does this community hope for and why? What would the future look like if this change is made? What would the future look like if the change isn’t made? (note: here, you’re trying to paint a picture of the ‘dream’ of the future if the change is made, and the ‘nightmare’ of the future if it isn’t.)
3. What choice are you asking people to make, and why now?
4. What action are you asking them to take and what impact will this have on the bigger picture? What’s the risk, or again, what would the future look like if we fail to act?

For more help with developing your Story of Now and full Public Narrative see the “Developing your Public Narrative” worksheet in the Appendix (pg. 74).

When woven together, your Public Narrative should present a plan for how to overcome the challenge at hand and give your listeners an opportunity to join you in taking action. In closing, remember that storytelling in organizing is a leadership practice above all and is a means of connecting, inspiring, and motivating one another to work together to create change.

As you listen to others’ Public Narratives, reflect on the following questions:
What values did the speaker’s story convey?
What details reflected those values?
What was the challenge, choice, and outcome in each part of their story?
What did the character in the story learn from those outcomes?
What was the speaker moving people to do?

For a more comprehensive guide to listening to and coaching others in telling stories, see the “Coaching Stories” worksheet in the Appendix (pg. 79).
Icebergs

When we are telling our personal stories, there may be some parts of our lives that we don't feel safe sharing.

We can think of our lives as an iceberg, with certain memories, events and relationships at the top. These parts of our stories are above the waterline on the iceberg, and we feel safe sharing these with others, and having people ask us questions about them. In the example shown, someone feels safe talking about faith, school, nature and their siblings and children.

In the bottom of the iceberg are parts of our stories that we don't feel safe sharing with others. In the example shown, someone feels unsafe talking about their parents, hometown and mental health. There can be power in keeping that to yourself and only sharing it with those who you know will honour and respect it.

Everyone’s iceberg is different, and people’s icebergs will change based on the audience, how they’re feeling that day, their mood, and so on. You may feel more safe telling certain parts of your story in certain situations and not others.

As storyteller’s we don't have to share anything from the bottom of our iceberg if we don’t want to.

As listeners and coaches, keep each storyteller’s iceberg in mind. As we ask questions and dig deeper, know that some parts of their stories are off limits. This doesn't mean we shouldn’t dig deeper, it means we should be thoughtful and caring when we do. This also means that our stories about what light us up are constantly changing.
Further Reading


Building Relationships

Key Concepts

- Long-term intentional relationships rooted in shared values are central to building power in organizing, and require consistent work and attention.
- The “4Cs” of a hard ask are an effective way to ask for commitment.
- Supporters move up the pyramid of engagement into leaders through leadership tryouts.
- Relational strategies, building relationships with individuals and through networks and organizations, are implemented via relational tactics: 1:1 meetings and house meetings.
- Recruitment and retention best practices can significantly increase the rate at which new people join and stay on a team.

Why Build Relationships?

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

Building Intentional 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 each other “why?”
**Relationships are long term.** Organizing relationships are not simply transac-
tional. We’re not simply looking for someone to meet our ask at the end of a 1:1
meeting (read on for what this means). We’re looking for people to join with us in
sustained, long-term growth and action.

**Relationships are created by mutual commitment.** Relationships require a
commitment from both people involved: a commitment of time, and committing
to support the other person even when you may not see anything in it for you.
That commitment must be reciprocal. If that commitment only flows in one
direction the relationship cannot be sustained. Because we can all grow and
change, the purposes that led us to form the relationship may change as well,
offering possibilities for deeper relationships or more enriched exchange. The
relationship itself becomes a valued resource.

**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 communi-
ties that make up your organizing campaigns.

Case Study: The 2012 Obama for America campaign had many returning vol-
unteers from the original 2008 campaign. Here are some of the top reasons
why volunteers came back:

• 87% said they returned because they had built a meaningful relationship
  with their team members.
• 80% said they returned because they had built a meaningful relationship
  with their organizer.
• 80% said they returned because their time was used effectively.
• 84% said it was because they felt welcomed and included.
• 80% said it was because they had a clear sense of how their efforts
  contributed.

Two themes emerge from these numbers: people stay committed because
of relationships and because they feel effective. This section unpacks how
to build relationships with volunteers. The Strategizing (pg. 56) and Taking
Action (pg. 66) sections offers a framework for how to be effective (and make
our people feel effective).
Relational Strategies and Tactics

Because building relationships is central to building power, having clear strategies and tactics for doing so is important.

Relational Strategies

We can think of three main strategies for building relationships to recruit individuals to our campaigns:

**Individuals:** Recruiting by building new relationships with individuals. Organizers develop relationships with each individual they hope to bring into the organization or campaign. Initial contact may be done at tables, street corners, sign-ups at rallies, or through online-to-offline actions.

**Networks:** Recruiting by connecting with networks built from existing relationships. Organizers draw numerous people in through informal relational networks of which they, or an individual they recruit, are already part of. New relationships are formed mainly between an organizer and the recruit, but the basic approach is to find individuals who can bring other people in through their own pre-existing relationships.

**Organizations:** Recruiting by building alliances with, or merging with, existing organizations. Organizers build relationships with leaders of existing organizations. New relationships are formed mainly between an organizer and a point person at an organization.

Organizers may use one or all of these relational strategies to build their organization or campaign. Their relational strategies will be implemented by using relational tactics.

Relational Tactics

While organizers may adapt them to fit their specific contexts, there are two main relational tactics available to an organizer: 1:1 meetings and house meetings.

In 1:1 meetings, the focus for the organizer is on building a relationship with one person. In house meetings, the goal is to build relationships between the organizer and a large group of people, and to establish or strengthen relationships between other attendees at the house meeting.
Both of these tactics end in a specific commitment, whether to have another meeting, to volunteer for the campaign, or take on a specific role on a team. A hard ask, which we explain next, helps provide a framework for creating commitment.

We'll go into more depth on these tactics below.

**Hard Asks**

When you ask someone to make a commitment – for instance, attend an event or take on a new role – it's important to make an effective ask, or what we call a “hard ask.” A hard ask is a question that results in a commitment to a specific action.

The 4C's are one way of thinking about the contents of a hard ask. Including the 4C's in each ask can help make them as effective as possible.

**Connection**

Before jumping into your ask, make a connection. Note what you both have in common, or ask why they care about the campaign. Ask them a couple further questions to find out more, and if they say something you relate to, share that with them!

**Context**

Lay the groundwork for the commitment you are going to ask for. Explain your campaign, strategy and the reasons why the commitment you are about to ask for is important. This part of your ask is an opportunity to convey urgency! Describe an urgent problem and how the person you are asking is the solution to the problem:

> We need to get an extra 115 petition signatures this week to meet our targets, and need another 5 canvassers to get there.

Don’t ask them to commit to something general; instead, have a specific event or role in mind. If it’s an event (e.g. a canvassing event or training), include the date, time, and location in your ask.

> Thursday at 6pm outside the Emily Carr Library Branch.
Be specific - make sure they understand what it is you are asking them. Provide time and space for them to ask questions until they're clear.

**Commitment**

This is the actual sentence where you ask for commitment to action. Ask in concise, plain, and specific language. Try to use a direct question such as, “Can you come?”.

Tip: The best hard asks have commitment sentences that have a) the fewest words as possible in them and, b) end in an actual question mark if you were to write it down.

- Example of an ineffective ask: “Would you be interested in coming to a meeting at some point to meet the team and talk about how you might want to get involved?”
- Example of an effective hard ask: “Our next team meeting is next Wednesday at 6pm at Noor’s house. Can you come?”

**Catapult**

Once they say yes, take that commitment and ‘catapult’ it into a second ask. This might mean asking for them to bring another person to the event, asking them to help with set-up or a planning task, or some other additional action your campaign needs.

> Great! I’m excited you’re coming. Do you have a friend you could bring?

**Three Types of No**

When securing commitment, it’s inevitable that our hard asks will sometimes be met with “no.” In organizing, there are three types of no that you will encounter – “not now,” “not that,” and “not ever.” Being attuned to the difference will dictate how you proceed with the person you’re asking.

If someone says “no” they might mean “not that time,” so try offering another
time or date. For example:

“Can you come to our next team meeting on Monday at 5PM?”

“No, I have to work then.”

“No problem, we have another meeting next Sunday at 1PM, can you come to that?”

If someone says “No, I don't want to do that,” it could mean “not that.” Try asking them to commit to something else. For example:

“Can you come door-to-door canvassing with us on Tuesday at 5PM?”

“I don’t know if I feel comfortable going door-to-door. I’ve tried it before and found it really intimidating.”

“That’s okay! We are also planning an event to recruit new volunteers for the end of the month. Will you come to the planning meeting for that on Sunday at 1PM?”

If someone says definitively “No, I’m not interested in doing more” or “No, I don’t want to join the team,” then don't worry about it! Thank them and move on. For example:

“Can you come door-to-door canvassing with us on Tuesday at 5pm?”

“No, I am too busy right now to take on anything else, I’m sorry!”

“That’s okay, thanks for taking some time to talk with me. Have a great day!”

**The 1:1 Meeting**

The 1:1 meeting is a tactic to establish, maintain, and grow relationships in organizing, specifically between two individuals. Each 1:1 meeting has four key pieces:

**Purpose** – Be up front in establishing why you are meeting in order to make sure you are both on the same page. If you plan to ask the person you're meeting with to make a commitment at the end of your 1:1, it is appropriate to let them know when you set up the meeting and remind them at the beginning of your meeting so that they aren’t caught off guard.

**Exploration** – Most of the 1:1 is devoted to exploration by asking questions. If you are meeting a person for the first time, ask questions that help you understand their story, values, and resources that may be relevant to your shared purpose (e.g. knowledge, relationships or skills they may have). If you already
have a relationship, ask questions that help you understand what’s going on in their life, and the challenges or success they are experiencing in their organizing.

**Exchange** – Exchange resources in the meeting such as information, support, and insight that will help them be part of your campaign; you may highlight connections between your stories, or provide coaching on a challenge. This deepens your relationship and creates the foundation for future exchanges. You might also ask about the skills the person is hoping to bring to the campaign.

**Commitment** – A successful 1:1 meeting ends with a commitment to start working together, including specific next steps on how you will do that, or to meet again and continue the relationship.

### Three Types of 1:1 Meetings

There are three types of 1:1s that you will use or engage in in your organizing relationships.

**Recruitment 1:1**

These meetings happen at the start of a relationship to connect you and a new volunteer, and establish a connection based on shared goals and values. The goals of the recruitment 1:1 are to make a personal connection, use your personal story to identify and gauge potential interests, discover shared experiences, connect on values, and lastly, pivot to engagement – that is, move the volunteer to action based on what you’ve discussed. Think about the volunteer’s aptitude, skills, and connections when considering how to best engage them.

See the Appendix (pg. 82) for a sample recruitment 1:1 meeting agenda.

**Maintenance 1:1**

These meetings should occur regularly between you and each of your team members (assuming that you are in a leadership role in your team or snowflake). This is an opportunity to catch up on a personal level, debrief recent actions taken by the organizer and their team, and offer coaching. Maintenance 1:1s should be scheduled regularly and proactively: do not wait for a problem to occur to schedule one. A good guideline is to schedule a maintenance 1:1 every two weeks, and at least once per month.

See the Appendix (pg. 83) for a sample maintenance 1:1 meeting agenda.
Leadership 1:1

These meetings are for organizers who are ready to take the next step on the pyramid of engagement in assuming more responsibility and taking on ownership of goals. First, recognize the accomplishments the organizer has already made, with a particular focus on any leadership tests they have recently passed that make them appropriate for the new role. Explain the context for why there is an urgent need for someone new to move into this role, then propose the idea of taking on this new leadership role. If all goes as planned and the organizer accepts, take the time to clearly lay out the new responsibilities and expectations.

Maintenance 1:1s are the primary opportunity to coach an organizer. See the Coaching section for more information on how to approach coaching (pg. 43).

Because every organizer has a limited amount of time, and maintenance 1:1s need to happen regularly, each organizer has a limit to how many relationships they can maintain. See the Structuring Teams section (pg. 48) for information on “sustainable relationship ratios.”
## Best Practices for a 1:1

<table>
<thead>
<tr>
<th><strong>Do</strong></th>
<th><strong>Don’t</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule a time to have this conversation (usually 30-60 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>Have a plan for your meeting – give context or purpose, connect with one another, and secure commitment</td>
<td>Chit chat about your interests</td>
</tr>
<tr>
<td>Share experiences and motivations</td>
<td>Skip stories to ‘get to the point’</td>
</tr>
<tr>
<td>Illustrate 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 your next steps together</td>
<td>End the conversation without a clear plan for next steps</td>
</tr>
<tr>
<td>Split the bill if you meet in a coffee shop or restaurant</td>
<td>Pay for the whole bill (note: it can make the relationship feel transactional and can get expensive in the long run!)</td>
</tr>
<tr>
<td>Meet in public unless you know them well (e.g. a coffee shop or public park)</td>
<td></td>
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</tbody>
</table>
House Meetings

The house meeting is a tactic to establish or grow relationships in organizing, amongst small to medium sized groups of people. House meetings bring people together to connect, share stories, and learn your campaign strategy. The goal is for participants to agree to take action on your campaign. Some of them will commit to holding their own house meetings or activating their networks, thus allowing your campaign to keep growing.

In a house meeting, the host invites a network of their acquaintances to attend. An organizer will often work with a host by coaching them through inviting their networks to the meeting and then lead the meeting.

House meetings do not have to take place in houses! While hosting a house meeting in a home is totally appropriate, they could also take place in cafes, community centres, worksites, and other community spaces. It's the format, not the location that matters!

What does a house meeting look like?

A house meeting provides an opportunity for each participant to share how they are connected to the campaign and share values and stories with the other participants. The organizer will give the attendees context about the campaign, model story sharing, and invite the attendees to share their story as well. The organizer closes the meeting using the Public Narrative framework to weave their Story of Self with those of the other attendees to make a Story of Us, and finish with a Story of Now, with a specific commitment through a hard ask.

In other words, each house meeting has four key pieces:

**Purpose** – Explain why you invited everyone to a house meeting, give a brief overview of the campaign and explain what you’ll be doing – mostly sharing stories and hearing from others. Make sure to be up front that at the end you’ll be asking everyone to get more involved.

**Exploration** – Most of the house meeting is devoted to facilitating the house meeting attendees getting to know each other and having a chance to express themselves. Go around the room and ask each person to share why they care about the campaign issue, and why it was important to them to come to the house meeting. Depending on the size of the group you may want to split them into smaller groups for this portion of the meeting. The idea here is to help each person express why this is important, and build connection with the other people at the house meeting, through the values your campaign is based on.
Commitment – After you’ve heard from each person, it’s time for you, the organizer, to ask for a commitment. Start by answering the question of why this campaign issue is important to you, yourself. Draw connections to what you’ve heard already, pointing out how your values or experiences are similar to those in the room with you. Finally communicate how the campaign strategy will act on those values by stating the campaign’s goals and strategy. Close by sharing details on what they can do to support the campaign. End with a hard ask.

Exchange – Ideally those attending say yes to your hard ask! At this point you may want to exchange what resources the people in the room have to help everyone fulfill their commitments. Depending on what they’ve committed to they may need a space to meet again, people with specific skills, a way to get around, etc. Set next steps for how you or others will support them in fulfilling the commitment.

Recruitment & Retention Best Practices
The following best practices can significantly increase the rate at which new people join and stay on your team. Here are some key best practices to keep in mind when building and maintaining relationships:

The following best practices can significantly increase the rate at which new people join and stay on your team. Here are some key best practices to keep in mind when building and maintaining relationships:

- **Don’t be apologetic**: organizing is an opportunity, not a favour. When asking for commitment, be positive and enthusiastic.
- **Always Follow-Up**: when someone offers to get more involved, ask for their contact information and give them yours. Follow up with them as soon as possible, ideally within 48 hours.
- **Make reminder calls**: call 1-2 days before the event and an hour beforehand. Some people prefer text or Facebook messages to phone calls.
- **Always schedule for the next time**: don’t let anyone leave without asking when they’ll be coming back.
- **Plan for no-shows**: assume that half of your people will turn up. For example, if you need four people for a successful event, plan on scheduling eight.
- **Design actions that are empowering to participate in.**

Designing actions so that they are inherently motivational is a key way to keep people engaged. See the Taking Action: Targets & Timelines section (pg. 68) for information on motivational engagement.
The Pyramid of Engagement: Recruiting organizers

The path from interested supporter to organizer does not happen overnight. Rather, it involves a supporter being recruited and moved into roles that require progressively more commitment and skills. In order to grow and take on more leadership, our people must demonstrate that they have the ability to perform the roles of each position.

As an organizer, it’s your job to identify and develop leadership in others. We call this process – whereby individuals take on more and more leadership – the pyramid of engagement. Here’s an example of an organizing pyramid of engagement (note that your pyramid might look different depending on your campaign).

1. **Supporter:** Individual supports campaign (e.g. signs a petition) but does not express interest in ‘getting involved.’ They may get email updates about your campaign but limited other communication.

2. **Volunteer Prospect:** Supporter signs up on a website or says yes to an organizer’s hard ask to volunteer. Organizer invites them to come out to a volunteer event, and, ideally, this invitation happens **within 48 hours** because prospects are more likely to say yes (and show up) with a quicker follow up timeframe.

3. **Volunteer:** Volunteer prospect comes out to a team event (e.g. a meeting or a canvassing event), and is now a volunteer with the team. Organizer schedules them to come to another event or schedules a recruitment 1:1 meeting. They will continue to get campaign emails, but may also receive emails specific to the team they are part of.

4. **Committed Volunteer:** Volunteer has been coming out regularly to team events and is a committed part of the team.

5. **Leadership Prospect:** Committed volunteer begins taking on leadership and succeeds at one or more leadership tryouts. Organizer then schedules a leadership 1:1 meeting to ask team member to take on a leadership role.

6. **Leader:** Leadership prospect is able to organize. They have passed tests so organizer asks them to be a leader. They may begin sending out communications to other team members about the local campaign.
Note: Steps 5 and 6 can be repeated over and over to move the organizer into new roles as they take on more responsibility and become more committed.

One thing to notice about the pyramid of engagement is that it is **wider at its base** than at the top - while our role as organizers is to move people up the pyramid, not everyone will be interested in being a leader, and our campaigns won’t necessarily function if everyone is a leader and we don’t have a broad supporter base.
The Organizing Cycle

The organizing cycle is a way frame all the steps required to bring an individual onto a campaign’s leadership team, starting from their first conversation with a volunteer, through to being in a leadership role recruiting others. The organizing cycle ties together most of the practices in the Building Relationships chapter into a progression that we can use to bring someone through all the stages on the pyramid of engagement.

Note: Each number on this diagram corresponds to a level on the pyramid of engagement (pg. 39).

1. We **identify new supporters** for our campaign through some sort of campaign tactic: gathering petition signatures through canvassing door to door, holding an event or via social media.
2. We seek out **volunteer prospects** by asking supporters if they will volunteer at an action or come to a recruitment 1:1 meeting. You may ask prospects to volunteer in person or on the phone. Many campaigns identify volunteer prospects by having an “I want to volunteer” box to check on petitions or online sign-up forms. We use a **hard ask** when asking prospects to volunteer or come to a recruitment 1:1.
3. The volunteer attends an **action** and is asked to commit to a future action before they leave. This continues until an organizer decides to hold a **recruitment 1:1** with them. We ask for commitment to a significant or ongoing volunteer role at a recruitment 1:1. Some campaigns, especially those requiring a high volume of volunteers such as a large scale canvassing-based campaign, From this point on an organizer does regular **maintenance 1:1s** with them.
4. The volunteer is given one or more **leadership tryouts** so they can exhibit the ability and commitment needed to take on the responsibility of a leadership role.
5. The tested volunteer agrees to take on a leadership role in a **leadership 1:1**. They become a leader on a leadership team, receives training and begins recruiting, coaching and escalating volunteers.

How early in your engagement with a new volunteer you choose to hold a recruitment 1:1 depends on how advanced your campaign is. An organizer starting a new campaign and building a leadership team from scratch would likely hold many 1:1s with new volunteer prospects, as there might not be any volunteer actions to invite them to. An organizer working on a well-established campaign with a functioning campaign is more likely to hold a recruitment 1:1 after a volunteer completes their first action.
Developing Leaders

People move up the pyramid of engagement with the support of an organizer. This happens through a person taking on gradually more responsibility and new roles on a campaign. A leadership tryout is an assigned task that gives a developing leader the opportunity to exhibit their ability and commitment. For example, you might ask someone who seems like a good prospect for a team lead role to chair and host your team’s next planning meeting. To demonstrate ability at this leadership tryout, they will have to organize the location, communicate the meeting details to the team, draft an agenda, and keep the meeting on track. At the end of a successful meeting, they will have exhibited significant leadership skills, as well as their commitment to give the time to the task and follow through. They will also have experienced leading a team meeting. This will let their organizer know that they are competent at taking on that type of role.

Design tryouts so that once someone has succeeded, they are ready to be developed into a specific, ongoing role. For example, if you need someone to organize a monthly volunteer orientation for your campaign, ask them to organize just one. Support them through running that orientation, and debrief the experience afterwards. If they are successful, ask them to host them every month via a Leadership 1:1.
Sometimes **leadership tryouts don’t go well**: they may have neglected to attempt the task they committed to do (they didn’t organize the orientation at all) and, therefore, are showing a lack of commitment; or they attempted the task and it went poorly (the orientation was disorganized and didn’t meet its outcomes) and showed a lack of ability. It’s important not to pass judgment or write people off when tryouts don’t go well. Many people want to commit to a campaign, but might lack the time commitment necessary at that due to work or family commitments or the skills to make it go well.

However, if a tryout goes poorly, don’t proceed as if it went well! You may decide to do another similar tryout with different coaching and follow-up if there was a lack of follow-through the first time. If they displayed excellent commitment but a lack of ability for a specific task, you may give them a tryout for another skill area and look to move them into another type of role. Depending on the circumstances, you may also choose to abandon efforts to move someone into leadership based on your best reasoning and intuition.

If a leadership tryout is not successful, you may also choose to use a series of smaller asks to help them tryout the skills more gradually. For example, rather than asking someone to coordinate all aspects of a petition gathering table at a public market, you could ask them to coordinate set-up, then support and train a new volunteer the next time, then to book the table space for the next event, and so on until they have performed most of the tasks needed to run a petition table at a market. Then, if you decide to ask them to organize the whole event from planning through to action, they will have practiced all of the tasks and it will be easier for them to follow-through on their commitment. Note that using micro-tries is slower and will take more time than bigger leadership tryouts, and that the two can also be used simultaneously within your team or even to complement each other with the same person.

To summarize, building strong, resilient relationships is critical for effective community organizing. Our power stems from our commitment to one another and to taking action together, and the hard ask, leadership tryouts, 1:1 meetings, house meetings and best practices for recruitment and retention are key tactics and tools to secure and nurture commitment.
Coaching: Enabling Others

Key Concepts

• Coaching is key for leadership development; the goal of coaching is to help people find their own solutions to meet challenges, and the role of the coach is to ask questions to get people to uncover the answers in themselves.
• Coaching can be thought of as a five-step process – inquire and observe, diagnose, plan, action, and check-in – and these five steps provide a simple framework for effective coaching in organizing.
• Developing a culture of coaching is key for building effective teams.

What is coaching?

If organizing is leadership that enables people to turn their resources into the power they need to make the change they want, then coaching is about enabling others. In trying to create change, organizers will undoubtedly run into challenges as failure, conflict, and obstacles are inevitable in our campaigns. Coaching is a means of helping individuals and teams work through these challenges.

The role of the coach is to help people find their own solutions; rather than offering advice, coaches ask questions to get people to uncover the answers themselves and use their own resources to meet challenges. The purpose of coaching is to enable others to build their own capacity to act, so they can coach others, and so on. In this way, coaching is synonymous with leadership development and so is key for building scalable, sustainable teams.

In organizing, coaching usually takes the form of an intentional conversation with an individual that helps them overcome a challenge or increase their, or their team’s, effectiveness. Read on for more details on effective coaching and the coaching process.
Maintenance 1:1s are the primary opportunity to coach an organizer in depth. See the Building Relationships section (pg. 33) for more information on what these are, how frequently they are practiced, and why.

**Inquisitive Coaching**

<table>
<thead>
<tr>
<th>Inquisitive Coaching</th>
<th>Directive Coaching</th>
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</thead>
<tbody>
<tr>
<td>Being present and listening.</td>
<td>Providing solutions before hearing / observing the obstacles.</td>
</tr>
<tr>
<td>Providing a space for your coachee to speak and be heard.</td>
<td>Being an expert or having all the answers.</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>
</tr>
<tr>
<td>Helping the coachee explore their challenges and successes.</td>
<td>False praising the coachee because you don’t want to hurt their feelings or solely criticizing the coachee for their weaknesses.</td>
</tr>
<tr>
<td>Empowering the coachee to identify resources and find solutions to the challenges themselves.</td>
<td>Identifying the challenge and coming up with the solution yourself.</td>
</tr>
</tbody>
</table>

**Coaching: A Five-Step Process**

There are five steps in the coaching process. While contexts vary, these five steps provide a simple framework for effective coaching in organizing.
1. Inquire & Observe

When you are observing a coachee's actions or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. Instead, be present with the coachee and **start by listening**, asking questions, and closely observing what they say and do so that you can both dig deeper into the challenge(s) at hand.

Ask yourself: what do I see and hear?

For example, is the coachee struggling to recruit people to their leadership team? Is the coachee articulating feelings of frustration or fatigue? Is the coachee struggling to complete routine tasks correctly or on time?

Remember, challenges aren't always obvious, and, sometimes, the bulk of the coach's work is simply supporting the coachee in discovering the nature of the obstacle they're facing. **“Backtracking”** can help both coach and coachee uncover the challenge(s) by summarizing the problem and checking if the coach's understanding is accurate. Here are some sample backtracking statements and questions:

- “Let me be clear about this…”
- “Let me see if I've got this right…”
- “What I'm hearing you say is ____. Is that right?”

2. Diagnose

Challenges in organizing usually fall into one or more of the following three categories: strategic, motivational, and skills challenges – or “**head, heart, hands**” – and how you coach depends on the nature of the challenge.

Ask yourself: **what is the nature of the challenge and how will I intervene?**

From the examples above, if the coachee is struggling to recruit people to their leadership team, you might focus on the coachee's understanding of **strategy** (head), or how they are approaching recruiting people and ask them questions to explore their plan and how it might need to be modified. On the other hand, if the coachee is articulating feelings of frustration or fatigue in recruiting leaders, you might focus on the coachee's **motivation** (heart) and offer encouragement. Lastly, if the coachee is struggling to implement their strategy or plan well, you might focus on the coachee’s **skills** (hands) and offer learning or practice to make sure they have mastery over the necessary skills.
Coaching is not only about addressing challenges and problem-solving. Inquisitive coaching – that is, asking questions with the aim of supporting people in uncovering their own answers – is an invaluable practice in developing our stories and devising strategy.

In storytelling, the coachee will always know more about their own story than their coach. By asking inquisitive questions, we can offer them the opportunity to revisit or think more deeply about their own motivations and values. In strategizing, having a coach ask good questions can strengthen the strategy by surfacing unnamed assumptions or gaps in strategic thinking, as well as lead the coachee towards more creative and effective strategic choices.

3. Plan

Now it’s time to support the coachee in creating a plan for moving forward. This plan should take the form of specific, timely steps the coachee will take to address the challenge(s) articulated in Step 2. Here are some sample questions you could ask the coachee in order to come up with next steps:

“If you knew you wouldn’t fail, what would you do?”
“How will you put this new information into practice?”
“What is the very next step in moving forward?”
“What resources and support do you need to accomplish this task?”
“When will you do this by?”

4. Act

Next, step back and observe the coachee in action. Give them time and space to take steps to address their challenge(s). Avoid the urge to do it for them.

5. Check-in

Now it’s time to hold the coachee accountable and support them in debriefing what happened.

Ask yourself: how do I help the coachee in reflecting on their experience?

Assess whether the diagnosis of the challenge and plan making were successful.
You may realize that you need to repeat Steps 1-4 and support the coachee in coming up with a different plan for addressing the same challenge, or it’s time to celebrate success!

When setting next steps it is helpful to have clear achievable goals. The SMARTI goal framework can help us set criteria for effective goals:

- **Specific**: the goal should be about one thing. If there are multiple next steps, make multiple goals.
- **Measurable**: it should be obvious when the goal has been accomplished. Set goals so that you can measure whether you are successful.
- **Achievable**: push yourself a little, but don’t set goals that are unrealistic.
- **Results-Oriented**: your goal should be about the outcome, not the process. For example, if your goal is to make reminder phone calls to volunteers, make the goal about how many people you will talk to, not how much time you will spend on the phone.
- **Timely**: set a date and time deadline for your goal.
- **Inspiring**: set goals that make you feel excited! Frame the wording and intention of your goal to be about the exciting impact you will have!

Next, start again! Nurturing a **culture of coaching** – whereby organizers are consistently and constantly enabling others to find solutions to meet challenges – is fundamental to leadership development and building power in organizing.

**Further reading**


Structuring Teams

Key Concepts

- Teams are critical to organizing, in part because they deepen relationships that help us commit to action.
- Effective teams are **bounded, stable** and **diverse**.
- Starting a leadership teams requires establishing **shared purpose, interdependent roles**, and **explicit norms**.
- The **snowflake model** is defined by mutual accountability and commitment, a sustainable number of relationships, clearly defined roles, and capacity for exponential growth.

Why Organize in Teams?

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

But first, why organize in teams? First and foremost, working in teams is **more fun** than working alone! Teammates offer **support and mentorship** to one another, which plays a key role in leadership development. People who feel supported and who enjoy what they’re doing are more likely to keep doing it. We’re up against a lot in our organizing, and doing this work with others can provide the motivation needed when times get tough. Additionally, we can **meet higher goals** working in teams by tapping into the diverse range of resources (including skills and knowledge) multiple people bring. And most importantly, by working in teams, we **develop relationships** with fellow teammates that facilitate and deepen our commitment to taking action.
What do effective teams have in common?

Effective teams usually have three elements in common:

- They are **bounded**. It is clear who is on the team and who is not on the team. It is clear how new people can join the team and what is expected of those who must leave the team.

- They are **stable**. People make clear tangible commitments: regular meetings, length of time, etc. Your team is not a revolving door, never knowing who will show up.

- They are **diverse**. It has the appropriate diversity of skills, talents, viewpoints, and constituencies that will be needed to do a good job.

Launching a Leadership Team

These are three decisions that a leadership team should make when first coming together in order to set itself up for success, and should continue to revisit as the team evolves. There are no “right” answers to these decisions, but they must be addressed for a leadership team to succeed.

See the appendix (pg. 87) for a worksheet that walks you through answering these questions as a team.

Shared Purpose

We can’t start building an organization without a clear purpose. A team must be clear on what it has been created to do. Its purpose should be clear and easy-to-understand, while it must also be challenging and significant to those on your team. Team members should be able to articulate their shared purpose.
**Interdependent Roles**

Each member of the leadership team must have responsibility for their own piece of work that contributes to the team’s purpose. A functioning team will have a diversity of identities, experiences, and opinions to ensure that the most resources and perspectives possible are being brought to the table.

In an effective leadership team, **no one works in a silo**. Roles are truly interdependent when each person on the team needs the output of another team member’s work to complete their own.

For example, if a team’s purpose was to educate youth in your community about consent you might have an organizer as Teacher Liaison contacting teachers to book classroom sessions, another organizer as Facilitation Coordinator recruiting and training workshop presenters, and a third organizer as Curriculum Coordinator in charge of designing and refining the workshop content. The Teacher Liaison will be dependent on the Facilitation Coordinator to provide presenters to fill the workshops they book in schools. The Facilitation Coordinator will be dependent on the Curriculum Coordinator for lesson plans and other materials. The Curriculum Coordinator will be dependent on the Teacher Liaison and Curriculum Coordinator to get feedback from teachers and presenters on how to improve the workshop content. By designing roles that require the different members of the leadership team to work together, the team will be bounded and sustainable over the long term.

**Explicit Norms**

Your team should **set clear expectations, or norms**, for how to govern itself. How will you manage meetings, regular communication, decisions, and commitments? And, importantly, what will you do if a norm is broken so that they remain active and relevant?

Teams with explicit norms 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? – while others address expectations for member interaction. Setting norms early on in team formation will guide your team in its early stages as members learn how to work together. Making norms explicit allows your team to have open discussions about how things are going. The team can update and refine norms as they work together to improve working relationships.
The Snowflake Model: Interconnected teams

The snowflake model is defined by its distribution of leadership and by its commitment to leadership development. **Relationships are the glue** that hold the snowflake together, and these relationships support the **interconnected teams** that make up the snowflake. Read on for more information on the key elements of the snowflake model.

Distributed leadership:
Core and local leadership teams

In the snowflake model, decision-making responsibility is decentralized whenever possible. The core leadership team ensures the whole organization or campaign is coherent and effectively moving in the same direction towards
long-term goals. Distributed leadership teams ensure the organization or campaign is flexible, effectively delivering on short-term objectives. Everyone is responsible for contributing to strategizing, ongoing learning, and identifying and growing new leaders and resources. The core leadership team devises strategy, while distributed leadership teams test that strategy on the ground. They adapt it locally and provide feedback to improve organization- or campaign-wide strategy.

Some organizers see team structures as hierarchical and prefer not to establish formal structures in an effort to avoid hierarchies. However, hierarchy develops regardless of whether you create it intentionally or not. Oppression and privilege, pre-existing social relationships, and some people having louder voices and others feeling too shy to speak up all lead to hierarchy within our teams. By intentionally structuring leadership teams, we can create hierarchies that are more effective and equitable, and then change them if they aren't working. See Jo Freeman’s work list in ‘Further Reading’ for more on this topic.

**A sustainable number of relationships**

In the snowflake model, each person has a sustainable number of relationships. While you are likely to interact with many people in your organizing work, it’s important to focus on maintaining relationships with those on your team (one way to do this is through regular team meetings or maintenance 1:1s). As a general rule, if you are organizing full time (i.e. committing 40 hours/week), then you can maintain up to ten relationships. If you are organizing part time, as is the case for the vast majority of grassroots organizers, you can maintain up to five relationships. Notice that in the previous diagram, no one is connected to more than five people.

The 1:1 meeting is an important tool for building the relationships that hold your team together. See the Building Relationships section (pg. 33) for information on 1:1 meetings.

**Mutual accountability**

Notice how the arrows in the diagram point both ways. The snowflake model doesn’t operate as a top-down hierarchy, with managers delegating tasks and expecting results. Rather, team members are accountable to each other,
mutually agree on tasks, and expect results from and provide support to each other. Someone within the core leadership team may assign a distributed leadership team with a task, but someone within a distributed leadership team is just as likely to assign the core leadership team with a task that will better enable them to meet their goals.

Clearly defined roles and responsibilities

Each individual in a team has a specific role with clearly defined responsibilities. While the team works together towards common goals, every task should be assigned to a specific team member(s) and each team member should clearly understand their responsibilities. Roles can vary based on the strategy and tactics (e.g. in an electoral campaign, roles may include a canvass captain, phone captain, and data captain, with a community organizer in a team leadership role).

Capacity for exponential growth

Because leadership in the snowflake is distributed into many small teams, and because the model is based on leadership development, the snowflake model has the capacity for exponential growth. As teams add more people, those people may break off and form their own teams, and those teams form new teams, and so on. Therefore, it may take three months to grow from five to 25 people, but in the next three months you could grow to 125 people, and three months later 625 people, and so on.

The size of a team and its growth rate will vary from campaign to campaign. For instance, teams working in the snowflake model structure can range in size from a few people running a small local campaign to thousands of teams with millions of volunteers: in the 2012 Obama for America campaign, the snowflake model enabled 10,000 local teams with 30,000 organizers to empower 2.2 million volunteers. That said, if implemented properly, the snowflake model has the capacity to get big, and get big fast.

Team Stages

Teams aren’t created as perfect, fully-functioning snowflakes. Rather, they go through different phases of growth and learning, and inevitably experience growing pains along the way. You can use the descriptions below to assess the state of your team and get ideas for next steps.
Phase 1: Potential - At this stage, a person is interested in organizing around an issue. To build a team, they will network and recruit within their community by scheduling 1:1 meetings. The organizer will organize events to meet potential new team members.

Phase 2: Team Formation - At this stage, the organizer has identified a few individuals that are interested in getting more involved in the campaign, but there are no official roles on the team. The team leader has to work to start recruiting team members and solidifying roles on the team. Note: this phase usually takes the longest.

Phase 3: Team - At this stage, everyone who is interested in getting involved in the campaign has made a commitment to do so. The organizer has held a core team meeting to identify the team's purpose and norms and place people into roles. Now, the team is official and it needs to grow to increase its potential. As more people attend events and join the team, the team grows as the leadership tryouts are conducted, leaders develop, and make hard asks. The challenge for organizers in this phase is to grow sustainably - that is, without growing too quickly and neglecting members of the existing team. In this phase, you must continue to invest time and resources into developing individuals that deliver. In other words, don’t get hung up on people who don’t show up; focus on those that do.

Phase 4: Developed Team - At this stage, there is a core leadership team and distributed leadership teams. If the team follows the pyramid of engagement approach, it will grow into a bigger and more efficient snowflake over time.

Phase 5: Team Transformation - At this stage, the team has grown to its fullest potential and can multiply into more teams. Organizers may start training existing team members to start new teams in other geographic areas (neighbourhoods or regions, also known as “turfs”) or to perform new tasks (adding a team that supports a tactic that is new to your team). Teams may split in two, with one half moving into new turf to start a team there. Organizers must be intentional and thoughtful in supporting the transformation process, as this can be a complicated time for teams and strong emotions amongst team members could come up.
Above all, remember that effective teams are bolstered by strong relationships, and that in the snowflake model, leadership is distributed, and organizers are committed to developing the leadership capacity of others.

**Further Reading**

Strategizing

Key Concepts

- We focus resources by strategizing in the context of a campaign.
- We devise strategy by asking first, “who are our people and what is their problem?” before deciding on our goals.
- Strategy is made up of nested goals: smaller, measurable goals that we achieve incrementally in order to meet our larger, mountaintop goal.
- Power as a relationship between resources and interests is fundamental to strategizing.
- A theory of change statement summarizes our strategy, and provides us with a strategic blueprint for how we plan on making change.
- A leadership team increases its strategic capacity by having diverse knowledge and perspectives, well-developed learning processes and strong motivation.

Campaigns

As we walk through this section, we are doing it within the context of a campaign: work focussed towards achieving a particular change in the world. The word campaign isn’t unique to organizing: there are advertising campaigns, election campaigns, and so on. The thing each has in common is that they are focussing resources towards achieving a goal that represents some tangible change.

What is strategy and how does it work?

Simply put, strategy is turning what you have into what you need to get what you want.

What you have is your community’s resources: people, time, skills, money, experiences, relationships, credibility, your allies, supporters, your leadership.
What you need to achieve the change you want is power. Power is gained through tactics that can creatively turn your resources into the capacity you need to achieve your goal.

What you want is your goal. Your goal is a clear and measurable outcome that allows you to measure progress along the way.

To illustrate strategy, we will use a classic organizing example: the 1956 boycott of the bus system in Montgomery, Alabama. In 1956, as part of regional racial segregation policies, black passengers had to sit at the back of the bus and white passengers at the front. If the bus was full, black passengers were forced to give up their seats for white passengers. Demanding a change to these rules, black passengers boycotted the bus system, depriving the system of substantial revenue. 381 days after the boycott started, the bus system was desegregated.4

Strategizing is motivated by an urgent challenge
We strategize in response to an urgent challenge or 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?

Strategizing is situated
Strategy unfolds within a specific context, the particularities of which really matter. The imaginative power of strategizing can be realized only when rooted within an understanding of the details of your campaign context as well as an understanding of the larger context your campaign is situated in. You need to understand the trees and the forest. During the bus boycott, the leadership team had to consider the finances of the local bus company and how withholding their bus fares would impact them, as well as the feasibility of all black residents in Montgomery using alternative transit for an indefinite period of time. They also had to understand how their local action would affect the national conversation on civil rights.

Strategizing is creative
Challenging the status quo requires making up for our lack of resources by using the resources we do have intentionally and creatively. During the bus boycott, the leadership turned the resources of their community (a bus fare) into power by mobilizing that resource collectively.

Strategizing is collaborative
Strategizing is most dynamic and effective when the group responsible for it brings diverse experience, background, and resources to the table. During the

bus boycott, strategizing was undertaken collaboratively by national and local organizations representing black people, the Women’s Political Council, representing black women, and white allies.

Strategizing is **intentional**
A 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*). We call this a **theory of change**, and will discuss it later in this section.

Strategizing is a verb, and is an **ongoing process**
Strategizing is something we do, not something we have. Strategizing is not about creating a static strategic plan at the beginning of a campaign and implementing it. Rather, we continually strategize as we implement our strategic choices and change our strategy in response to what happens. In this way, we ‘act our way into new thinking’ rather than ‘think our way into new acting.’ At first, organizers in Montgomery pursued only a legal strategy, fighting segregation in the courts. It was only after the Women’s Political Council circulated a flyer calling for a boycott in solidarity with Rosa Parks being arrested for refusing to give up her seat, that a one-day boycott was agreed upon by the black community in Montgomery on December 5, 1955. It was not until organizers saw a successful one day boycott that they called on the community to boycott the buses until they had been desegregated.

**How to strategize**

When strategizing in organizing, we ask ourselves six questions:

1. Who are our PEOPLE?
2. What is the PROBLEM?
3. What is our GOAL?
4. What is our THEORY OF CHANGE?
5. What are our TACTICS?
6. What is our TIMELINE?

In this section, we will discuss the first four, and we will dig into the last two in the Taking Action section (pg. 66).

**Step 1: Who are my people?**

By starting with the question “Who are my people?” instead of “What is my issue?” we will ensure that we are designing a campaign that people will join. If we pick an issue or problem to work on first, then try to find the people later, we
may find there is no one to join us. So we ask “Who are my people?” and then “What is the problem that they face?”.

Step 2: What is the problem?

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

What is the problem?

What problem are our people facing? To be most effective as an organizer, we should seek to enable your people to change an intolerable circumstance. By focussing our efforts on solving a problem that is emotionally resonant with our community, we know that it is important enough to them to organize until they win.

In the Montgomery Bus Boycott example, the people were black residents of Montgomery, and their intolerable circumstance was a system of racist segregation policies.

Why hasn’t the problem been solved?

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

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

What would it take to solve the problem?

If the problem were to go away, what would need to be different in the world? What would you have to build, who would you need to elect, what law would need to be changed, what program would need to be funded? As you start to answer this question, you’ll start to set your strategic goal.

Step 3: What is the goal?

Every organizing campaign should have a clear strategic goal. Choosing a strategic goal is often the most important choice we make in designing a campaign.
No one strategic goal can solve everything. In order to put our resources to work solving our problems, we have to decide where to focus. We must ask ourselves: what goal can we work toward that may not solve the whole problem, but will get us tangibly closer to solving the problem? Unless we choose a goal to focus on, we'll risk wasting our resources in ways that just won't add up.

Strategy is nested; our campaign's ultimate goal, or the “mountain top” goal, is likely not achievable in one attempt. Instead of chasing after the mountain top goal all the time, we can set smaller, nested strategic goals that help measure incremental progress throughout the campaign. Nested goals may take place over time (e.g. a local campaign for a municipal living wage policy may start with electing supportive council candidates before moving on to pushing for an actual bylaw), or over a geographic area (e.g. an election campaign will have a nested goal for each of the ridings in needs to win in order to win the election).

Each time we accomplish a nested goal, we have moved a step closer to achieving or mountaintop goal, while also having built the power of our community, making it easier for us to achieve our next nested goal.

An effective strategic goal:

1. Creates a **measurable** change in the world, often by tangibly improving the lives of the people who are organizing.
2. **Focuses resources** on a single strategic outcome.
3. **Builds the capacity** of our community.
4. **Uses a point of leverage**: our community's strength or our opposition's weakness.
5. Focuses on a **motivational issue** that is visible and significant to our community.
A effective strategic goal is not:
1. Solely about raising awareness without another outcome.
2. Implementing a tactic such as a rally (we'll cover this in more depth in the next section).

**Step 4: What is the Theory of Change?**

Once we know what our strategic goal is, we need to decide how we will achieve it. A **theory of change** sums up how what we do will result in the change that we want. In community organizing, the theory of change is based on power relationships, and in this context, power is not something that you have by virtue of the position you hold in an organization. Instead, organizers understand power as the influence created by the relationship between interests and resources.

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

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

**Power with vs. Power Over**

**Power with:** Sometimes we can create the change we need just by organizing our resources with others, creating power with them and without shifting power relationships with actors outside your community. For instance, creating a community credit union or a community run day care are examples of power with community organizing.

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

**Note:** All organizing involves power with to some extent. Even when there is a problem involving power over your people, you will still need to create power with by organizing your community's resources.

When we have to engage those who have power over us in order to create change, we can ask ourselves five questions:
1. What is our goal?
2. What person or organization has the power to realize our goal?
3. What is that person or organization’s interests and vulnerabilities?
4. What resources do we have at our disposal (or can get)?
5. What strategies can we use to leverage those resources, and target their vulnerabilities, to achieve our goal?

Once we have answered these questions, we’re one step closer to deciding on our strategy, which we can articulate in a theory of change statement.

**Resources**
Regardless of whether the problem is a power with or power over situation, identifying our community’s resources is key. For example, assume our people are local families whose problem is not being able to bring refugee relatives to Canada. Their resources include: their relationships in the community, volunteer time, their homes, their votes in elections, money, knowledge of the immigration system, stories about their family, contacts in government, and artistic skills. This community could use their money, time, relationships, knowledge of the immigration system and stories to raise money to sponsor their relatives through the immigration system. They could use artistic skills and stories to hold media stunts to shame government into making immigration policies more accessible. They could use their time, relationships and contacts in government to lobby the government to make changes to the laws. This community has many strategic options to pursue, but each is dependent on their resources and how they use them. As a result, knowing what their resources are is critical in identifying their theory of change.

**Three Faces of Power**
When strategizing, we can think about 3 distinct ways in which we can bring about change: direct political involvement, structural changes, and shifts in worldviews. Ideally, we can set goals and theories of change that work on all three faces of power simultaneously.

**Decision: Direct Political Involvement**
With direct political involvement, we work to influence decisions within the systems and structures that are already in place. This type of strategy buys time for the long-term change that is desired, and is often (though not always) insufficient to bring about sustained change. It can involve direct actions like civil disobedience, boycotts, blockades, and other forms of refusal. It can also involve
trying to impact elections, change laws, and affect political and economic decisions. For example, a campaign working for the rights of transgender people might work to develop trans-inclusion policies at local school boards or city councils.

Structures: Structural Change
Structural change involves shifting the structures that are preventing change from occurring by actively building capacity in the organizations, groups and communities that are working towards the desired change, and shifting control over the structures working against our interests. It involves building up a sustained membership, organizing people for collective action, and developing leaders who can guide these organizations through the desired change. For example, a campaign working for the rights of transgender people might work to develop a lobby group for trans rights or identify trans leaders to run for public office themselves in order to develop power structures to advocate for their community in the long term.

Systems: Shifts in Worldviews
By shifting worldviews, the oppressive values that lead to injustice are changed, while the values that will allow change to survive are developed. In order to develop these values, we draw upon existing cultural beliefs, norms, traditions, histories and practices that shape political meaning. We can do this by taking the values and stories of the change we are trying to create, and connecting those to the values and stories of the people whose worldview we are trying to shift. In this way, telling compelling stories is key to many strategies trying to shift worldviews. For example, a campaign working for rights of transgender people might share stories of the oppression experienced by trans people in public spaces and the media in order to shift the worldviews and values of decision makers and the general public.

Challenging All Three Faces of Power
When setting strategic goals and theories of change, we can challenge systems, structures and key decisions simultaneously. In the Montgomery Bus Boycott, the organizers created tangible change for their community by engaging in direct action (a boycott) to desegregate the buses. They shifted structures by building capacity in the black community in Montgomery, developing leaders, and creating new organizations to fight segregation more broadly. And they dragged systemic racism into view by creating a conflict in the other two faces of power, which allowed them to raise awareness of how systemic racism was unacceptably rooted in their community.
Goal and Theory of Change: Chicken and Egg

You can’t know what your theory of change is until you know what goal you are trying to achieve. And sometimes you don’t want to set a goal until you have a sense of what theories of change you stand a chance of succeeding at. As you develop your goal you can have an eye to what’s possible, and as you develop your theory of change you may go back and revise your goal based on your best path to success.

Theory of Change Statement

A theory of change statement is a tool to understand our strategy and how (or if) it will work. Writing out a theory of change statement is an opportunity to expose weak assumptions, and can be a useful tool to compare several possible strategies for achieving the same goal. It can also force refinement and tough conversations: being able to put your strategy into words requires you to understand it well. The process of coming to a consensus amongst your leadership team on a theory of change statement ensures that everyone is in agreement on what strategy is being pursued and why.

A theory of change statement uses this format:

If we do (STRATEGY)  
then (STRATEGIC GOAL)  
Because (ASSUMPTION)

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

If we put financial pressure on the bus company  
then the bus company will desegregate the buses  
because the bus company values profit more than their racist values.

The strategy is to put financial pressure on the bus company, with the goal of desegregating the buses. The “because” portion of the statement, that the bus company values profit over their racist values, is the assumption that has to be true for the strategy to work. When we draft a theory of change statement, the “because” portion of the statement is an opportunity to expose the weak points in our strategy. If the weakest assumption in our strategy seems true, then we have a pretty good chance of succeeding.

A theory of change is just that, a theory. It is a hypothesis about how we will achieve the change we want. We then test our theory of change by implementing it through tactics, which we will cover in the Taking Action section (pg. 66).
Strategic Capacity

Strategic capacity, the ability to create effective strategy, is best developed by a leadership team, rather than in the head of a single individual. As our leadership team strategizes, these three factors increase its capacity to strategize.

Diverse Knowledge and Perspectives

When a leadership team has a diversity of life experience and knowledge, it can facilitate innovative and creative thinking. With a diverse group comes access to a wide-range of knowledge for strategizing in your specific context, which can be used to strategize multiple different solutions to choose from to achieve the desired outcome. The leadership team can then choose the solution that will be most effective.

Learning Processes

Since strategizing is an ongoing process, learning processes are key to developing strategic capacity. Leadership teams should listen and seek out feedback to their strategy, gauge success or failure, and adapt accordingly. These learning processes can feed into changes that will be reflected in an updated strategy or strategies.

Motivation

Motivated individuals are more driven to do the hard work that is required to learn the knowledge and skills needed to achieve a desired outcome. Motivation also influences creativity because it affects the focus towards one's work, ability to concentrate for long periods of time, persistence, willingness to take risks, and the ability to sustain high levels of energy.

In closing, strategy is simply turning what you have into what you need to get what you want. Thinking through – Who are our people? What is our problem? What is our goal? And what is our theory of change? – is critical to effective community organizing.

Further Reading

Taking Action: Tactics & Timelines

Key Concepts

- For a tactic to be effective, it should implement your theory of change, add resources to your organization, develop leaders, align with your values, and prioritize movement building.
- To effectively engage our people in action, we need to get their commitment and use motivational engagement.
- An organizing sentence summarizes your campaign and provides clarity on your people, strategy, tactics, and timeline.

Step 5: What are the Tactics?

We can think of strategy as our plan for making change, and our tactics as the actions through which we implement our strategy. Just as it’s important to devise effective strategic goals, it’s important to choose the most effective tactics to meet those goals. Your organizing effort will quickly run into challenges if you use tactics that fail to move you towards your strategic goal. Similarly, if you spend all your time strategizing without putting it into practice via tactics, you will have wasted your time.

The Sweet Spot

A tactic is most effective when it meets these five criteria:

1. Implements your theory of change: it results in concrete, measurable progress toward your campaign goal. In a power over campaign, you must be able to answer how the tactic gives you leverage over your target.

2. Adds resources to your organization: it attracts and engages new people; it adds resources to your campaign; it increases your community’s capacity to work together to make change.

3. Develops leaders: it builds the leadership, skills, and capacity of your community.
4. **Aligns with your values**: we should never sacrifice our values for an easy win.

5. **Prioritizes movement-building**: we are not operating in isolation in our campaigns - our actions affect others that are working towards justice and we must be mindful of that as we choose tactics.

When choosing tactics to implement your strategy, you’re aiming for the “sweet spot” where all of the first three criteria overlap. There may be times when, due to particular constraints or context, a tactic may only hit two of the three criteria and you will still go ahead with it, but ideally most of your tactics will meet all three.

However, there are two criteria that you don’t want to compromise on meeting. In order to ensure that we are building towards the world we want to live in as we design and implement our tactics, it is essential to choose tactics that always align with your values and don’t undermine other campaigns, communities or allies in the movement.
Commitment and Motivational Engagement

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

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

The best way to secure a commitment to a specific action is by making a “hard ask.” See the Building Relationships section on Hard Asks (pg. 30) for more information.

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

There are three characteristics of a motivational action:

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

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

In addition, there are five assessment criteria that serve as guidelines for designing motivational action:

- **Task Identity** – Do people get to do the whole thing from start to finish?
- **Task Significance** – Do people understand and see the direct impact of their work?
- **Skill Variety** – Do people engage a variety of skills, including “head, heart, and hands” (or strategic, motivational, and skills tasks)?
- **Autonomy** – Do people have the space to make competent choices about how to work?
• **Feedback** – Are results visible to the people performing the task, even as they perform it?

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

### Step 6: What is the Timeline?

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

In organizing, we assume that we begin a campaign with far fewer resources than we will need to tip the balance of power and achieve our goal. We use **relational tactics** such as telling stories, recruitment phone calls, recruitment 1:1s, house meetings, coaching, and leadership development to grow our capacity (people, commitment, experience, money, skills, etc.) to have enough power to succeed. This capacity-building is what builds momentum. Like a snowball, each success contributes resources, which makes the next success more achievable. For more on relational tactics, see the Building Relationships section (pg. 29).

As we map our campaign, we identify milestones for when we will have created enough new capacity and developed enough power to undertake campaign tactics that we couldn’t before. **Campaign tactics** are when we mobilize our resources to affect change. Read on for more details of what happens during each step of a typical campaign timeline.

### Foundation

During the foundation period, the goal is to create the capacity needed to launch a campaign. A foundation period may last a few days, weeks, months or years, depending on the scope of the undertaking and the extent to which you start ‘from scratch.’ Organizers prioritize relational tactics during the foundation period. This typically includes 1:1 meetings, house meetings, and meetings of small groups of supporters. This is a crucial period for leadership development.


**Kick-Off**

The kick-off is the moment at which the campaign officially begins, and is the first campaign tactic. Setting a date for a kick-off creates urgency and focuses the concentration and commitment it takes to get things going. The kick-off becomes a deadline for initial recruiting, planning, and preparation of materials. Ideally, a kick-off both builds public excitement and awareness for the campaign and is a sweet tactic which clearly implements the theory of change. The kick-off event allows organizers to exercise leadership, new recruits to be identified, and commitments made to the next campaign tactic(s).

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

**Peaks**

The campaign proceeds toward a series of peaks where campaign tactics occur, each one building on what has come before. By crossing the threshold of each peak, the campaign breaks through to the higher level of capacity needed to reach the next target. Each peak should have a measurable goal (e.g. decision passed by a local government, number of signatures on a petition, dollars raised towards a fundraising goal, etc.) that launches the campaign forward towards its next peak. This way, it is possible to measure success and make adjustments accordingly based on observable data.

**Strategic Goal**

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

**Evaluation, celebration and next steps**

Campaigns are either won or lost. Only by risking failure do we make the kind of commitments that make success possible. Whether or not a campaign is successful, there is value in learning and celebrating the effort.

To succeed at winning, you must realize when you have won and learn to
celebrate success.

Never claim a victory that's not yours or pretend a loss is a win. It robs the effort of its value. We need to acknowledge a loss as a loss, and debrief the loss, interpret what happened, accept responsibility, recognize those who contributed, and prepare for what comes next.

Win or lose, a campaign should always conclude with evaluation, celebration, and preparation for next steps. When we win, we are sometimes so interested in celebrating, we forget to learn why we won, what we did right or wrong, and recognize those who contributed. When we lose, even when we do evaluate, we may not celebrate the hard work, commitment, courage, and achievements of those involved in the campaign. The important thing about campaigns is there is indeed a ‘next time’ and it is important to prepare for it. Or, as many a Canucks fan has remarked, “Just wait ‘til next season!”
Organizing Statement

The organizing statement is a tool used to clarify the important components of your strategy and organizing plan. Every team in a campaign – including the core leadership team and each distributed leadership team – should compose an organizing sentence unique to their team.

An organizing statement looks like this:

We are organizing (WHO) to pursue (MOUNTAINTOP GOAL) by (STRATEGY) to achieve (STRATEGIC GOAL) by (WHEN). We will use the following tactics: (TACTICS) to achieve (KICK-OFF/PEAK) by (WHEN).

For example, an organizing statement on the Montgomery bus boycott might have read like this:

We are organizing black transit users in Montgomery to pursue ending racial segregation by putting financial pressure on the bus company to achieve desegregation of the buses by the end of 1956. We will use the following tactics: a one day city-wide boycott and a rally to achieve the start of the boycott by December 5, 1955.

By going through the process of writing out an organizing statement, you check off every aspect of your strategy and get your whole leadership team on the same page.

To summarize, we implement tactics to take action and put our strategy into practice. In order to be effective, we must employ sweet tactics that are strategic, strengthen our organization, develop leaders, align with our values and prioritizes movement-building. In turn, formulating an organizing statement that employs sweet tactics and is mindful of the campaign timeline is a useful tool for guiding and focusing our organizing.

Further reading

Beautiful Trouble. Tactics. See http://beautifultrouble.org/tactic/


Tying It All Together

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

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

We strategize and act to **wield power** in organizing. We devise strategies in response to intolerable circumstances our communities face, and our strategies become our blueprints for making change. We implement our strategy by taking action via tactics and, subsequently, deepen our relationships, strengthen our teams, and develop shared stories in the process.

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

Worksheet: Developing your Public Narrative

Story of Self
To start in developing your Story of Self, reflect on the following questions:
1. What will I be calling on others to do?
2. What values move me to act and might also inspire others to take 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?

As you answer question #3 above, here are some potential sources of inspiration you might draw stories from:

<table>
<thead>
<tr>
<th>Family &amp; Childhood</th>
<th>Life Choices</th>
<th>Leadership Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Parents/Family</td>
<td>• School</td>
<td>• First Experience with Political and Civic Issues</td>
</tr>
<tr>
<td>• Growing Up Experiences</td>
<td>• Career</td>
<td>• A Key Moment in Your Work as an Organizer</td>
</tr>
<tr>
<td>• Your Community</td>
<td>• Partner/Family</td>
<td>• Role Models</td>
</tr>
<tr>
<td>• Role Models</td>
<td>• Hobbies/Interests/Talents</td>
<td>• Current Experience as an Organizer</td>
</tr>
<tr>
<td>• School</td>
<td>• Finding Passion</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Overcoming Challenge</td>
<td></td>
</tr>
</tbody>
</table>

Next, based on your reflection, use the table below to write out the details of one choice point – a specific experience when you faced a challenge, made a choice, experienced an outcome, and learned a lesson.
Challenge | Choice | Outcome
--- | --- | ---
Why did you feel it was a challenge? What was so challenging about it? | Why did you make the choice you made? How did it feel? | How did the outcome feel and why? What did it teach you?

Now, you’re ready to draft a Story of Self. In crafting your story around the choice point you’ve chosen above, try to be as detailed as possible. Create setting for your listeners – paint a vivid image of what you experienced (what you felt, how it sounded or looked like). Feel free to draw pictures, too.

**Story of Us**

To start in developing your Story of Us, reflect on the following questions:

1. What values and experiences do you share with this community? (note: ‘community’ here is the ‘us’ in your story)
2. What experiences have had the greatest impact on this community?
3. What challenges has it faced? How did it overcome those challenges?
4. What change does this community hope for and why?

Next, based on your responses to the above, use the table below to reflect on another choice point but, this time, for your community. (Note: ‘community’ here can mean your group or organization, people involved in your campaign, or even the specific individual or group of people with whom you’re sharing your story).
Your goal here is to tell a shared story that evokes shared values, illustrates the challenge(s) your community has faced or faces, and gives your community hope that it can act together to make change.

**Story of Now**

In developing your Story of Now, reflect on these questions:
1. What is the urgent challenge your community faces?
2. What change does this community hope for and why?
3. What is the nightmare?: What would the future look like if the change isn’t made?
4. What is the dream?: What would the future look like if this change is made?
5. What choice are you asking people to make that will pick the dream over the nightmare, and why now?
6. What action are you asking them to take and what impact will this have on the bigger picture?

Next, based on your responses to the above, use the table below to reflect on one last choice point but, this time, one that your community faces now.

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Choice</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<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>
</tr>
</tbody>
</table>
Challenge | Choice | Outcome
--- | --- | ---
What is the problem your community faces? Why is it urgent to organize now? What stories or images can you convey to make the challenge real for your listeners? | What will the future look like if your community fails to act? What could the future look like if your community does act? | What is your call to action? (Make it a hard ask) How will their action lead to the dream?

In drafting your Story of Now, remember that you’re trying to paint a clear and vivid picture of the urgent challenge your community faces, what the future could look like if they join you, and what specific action your listeners can take now to make it happen.

**Weaving it together**

Now it’s time to weave Self, Us, and Now together. Use the table below to guide you. Then, it’s time to try it out by practicing your full Public Narrative with others.
<table>
<thead>
<tr>
<th><strong>Self</strong></th>
<th><strong>Us</strong></th>
<th><strong>Now</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Which choices in your life have led you to be here today? Pick one or two that relate to this community and this moment.</td>
<td>What is this community all about and which stories reveal that? What specifically moves you about this community?</td>
<td>What specific choice are you asking people to make? What is your call to action?</td>
</tr>
</tbody>
</table>
Worksheet: Coaching Stories

The following are three steps to help you coach others in their storytelling. Review this worksheet before you start. Remember, your goal here is to listen and to support the coachee in improving their stories. Steer clear of sugar feedback – “That was really great!” – instead, try asking questions and observing how the coachee responds.

Step 1: Ask questions.

Start by asking:

“*How did you feel telling your story?”*

“*If you were to tell it again, what would you do differently?”*

Then, note some of your first impressions and give them space to speak to what you noticed.

“*I noticed you did ___ or made this decision in telling your story, why did you do that?”*

“*You said ___ in telling your story, what did you mean by that?”*

Step 2: Pay attention.

As you’re listening, reflect on the following elements of the story and ask yourself the attendant questions. Repeat some of your reflections back to the storyteller using the sample statements.

A. Challenge, choice, outcome.

What were the specific challenges the storyteller faced?
Did the storyteller paint a clear picture of those challenges?
Was there a clear choice made in response to the challenge(s)?
What was the outcome that resulted from the choice(s)?

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

“I understood the challenge to be ____ and the choice to be ____. Is that what you intended?”

“How would you describe the outcome of your choice? I heard ____ or learned ____, is that what you intended?”
B. Values.
Could you identify the storyteller’s values and where they come from? Did you hear the storyteller voice or describe certain emotions? How did the story make you feel?

“It’s clear from your story that you value ____.”
“Your description of that value / emotion resonated with me because...”

C. Details & Setting.
What were the sections of the story that had especially vivid details? What did these descriptions do or how did they make you feel?

“Your description of detail / image / feeling helped me identify with your experiences because...”

Step 3: Tell them what you’ll remember.
Tell the storyteller what stood out for you or resonated with you, and what you will remember.

“Your description of detail / image / feeling stood out for me, because...”
“The story hooked me at ____ point, because...”
Worksheet: Storytelling Checklist

You can use this checklist to self-assess how you are effectively using all the tools in your storytelling toolkit!

Did my story have...

☐ Story of Self
  ☐ Contains Challenge/Choice/Outcome
  ☐ Audience understands values that motivate me
  ☐ Action-motivating emotions
  ☐ Grounds the story in specific moments
  ☐ Contains vivid imagery/texture

☐ Story of Us
  ☐ Contains Challenge/Choice/Outcome related to the “Us”
  ☐ Creates an “Us” around values shared by the audience
  ☐ Action-motivating emotions
  ☐ Includes audience in the “Us”
  ☐ Grounds the story in specific moments
  ☐ Contains vivid imagery/texture

☐ Story of Now
  ☐ Presents a nightmare and a dream
  ☐ Articulates a strategy or action connected to values
  ☐ Action-motivating emotions
  ☐ Contains vivid imagery/texture
  ☐ Grounds the story in specific moments
  ☐ Makes a hard ask

The strongest part of my story was...

The part of my story I most need to work on is...
Resource: Recruitment 1:1 Agenda

The following is a sample recruitment 1:1 meeting agenda. Reminder that this is a framework you can follow, not an exact formula for what you must do in a 1:1.

**Purpose (2 minutes)** – Be up front about your purpose for the meeting (e.g. “Our team needs another regular canvasser.”), but that first, you’d like to take a few moments to get acquainted.

**Exploration & Exchange (20 minutes)** – Most of the 1:1 is devoted to exploration by asking probing questions to learn about the other person’s values, skills and interests, as well as resources they might hold. In response, it’s up to you to share your values, skills, interests, and resources so that it can be a reciprocal exchange. Start by asking questions like:
“Why is this issue important enough for you to act?”
“Did you always feel strongly about this issue? Why / why not and what changed that?”

Once you have an understanding of their story and motivations, share yours. Wherever you find similarities between their story and yours, make a connection.

*In this portion of the 1:1, you are trying to get them to share their Story of Self with you, and then to share your story to build a Story of Us. See the Telling Stories section (pg. 17) for more on this.*

**Commitment: A Hard Ask (10 minutes)** – A successful 1:1 meeting ends with a commitment to work together. This commitment is best secured through a hard ask:

- Stress the urgency of the commitment you are asking for:
  - “We need another canvass lead to enable our team to meet our target.”
- Emphasize the values you have in common:
  - “To achieve the change we want we need to meet our targets.”
- Frame it so that it seems the person you’re asking is the solution to the problem:
  - “Will you join our canvass team?”
- Be specific: make sure they understand what it is you are asking them. Provide time and space for them to ask questions until they’re clear.
- End the meeting with an understanding of next steps – that is, they should leave knowing the next time you will meet or how and when they will hear from you.
Resource: Maintenance 1:1 Agenda

The following is a sample maintenance 1:1 meeting agenda. Reminder that this is a framework you can follow, not an exact formula for what you must do in a 1:1.

Check-in and set agenda (5 minutes)
• What's going on in our lives right now?
  • Start the 1:1 by seeing how you are both doing today and since your last meeting. Genuinely sharing your lives will help you fully understand the context of any challenges that may be coming up for the volunteer and for you. It’s also a good way to understand the mood and context of your meeting!

Set or review purpose of 1:1 (2 minutes)
• What do we want to talk about?
  • Compare notes on what you want to discuss and accomplish in your meeting. If there is a lot to cover, you may need to prioritize which items to cover first.

Updates and debriefing (10 minutes)
• What’s new on the campaign?
  • If there are updates from other teams to share that affect your organizer’s team or role, or exciting developments they may not have heard about, share them and discuss any implications for their role.
  • How did that thing go?
    • If there have been any significant events – meetings, campaign or relational tactics, significant interactions with other team members – ask them how it went, help them debrief any learnings and decide if there are any action that’s required.
    • This includes reviewing that any commitments made or action items recorded in your last meeting were completed by each of you.

Coaching (30 minutes)
• Help them troubleshoot any challenges by asking coaching questions. See the Coaching section (pg. 43) for more on how to practice effective coaching.

Commitments (10 minutes)
• What do we have to do?
  • Review any action items you each took on as a result of your discussions.
• When will we meet next?
  • Set a time and place for your next 1:1
Resource: Sample Coaching Questions

1. Could you say more about that?
2. Have you ever experienced a challenge like this before?
3. What do you really want?
4. How can I help right now?
5. Why do you think that is so?
6. What’s the dynamic here?
7. What’s your role in that?
8. How long have you been doing that?
9. If you had a choice, what would you do?
10. What gets in your way in this area?
11. What is your biggest fear about that?
12. What are the 3 steps to achieve that?
13. How do you know that?
14. Is it ___ or ___?
15. Does this really matter to you?
16. What would you do if you knew you wouldn’t fail?
17. What do you most need right now?
18. What kind of support would be helpful?
19. What question should I be asking?
20. What is your strategy for that?
21. What would give you the most joy?
22. What is currently motivating you?
23. How healthy is that for you?
24. What are you tolerating?
25. Why are you pushing this hard?
26. Where is your integrity soft?
27. Is that delegate-able?
28. Would environmental changes help?
29. Are you being selfish enough?
30. How could you simplify that?
31. What is the truth here?
32. Why is that so frustrating?
33. What is your vision?
34. If you were the coaching me on this, what would you ask?
35. What is your next natural step?
36. What would make that perfect?
37. Where might you get stuck?
38. Who can get you that answer?
39. How are you?
40. How are you best coached?
41. What can you do today to get you back on track?
42. What could happen to change your mind?
43. How would that look?
44. What could keep you from completing that?
45. How might you simplify that?
46. How will you know if you are going in the right (or wrong) direction?
47. What do you need most right now?
48. What are some steps that you can take this week towards achieving that?
49. In what way is that in alignment with your values?
50. What does your inner wisdom say about it?
51. How will you test your idea?
52. How will you know if you are over-extending yourself?
53. What would success look like for you?
54. Would it be useful to write it down?
55. How are you taking care of yourself?
56. How does that fit into the big picture?
57. Where are you tolerating less than the best for yourself?
58. What do you already know about it/them that indicates what you can expect?
59. What do you need to know that you don’t know?
60. What is your priority?
Worksheet: Team Assessment

Assessing the 3 key ingredients

1. What is your team’s shared purpose?
   a. Are there nested goals below that shared purpose?

2. What are your explicit norms? Some examples:
   a. How often do you meet?
   b. How do you make decisions?
   c. How do team members communicate with each other?

3. Do you have interdependent roles?
   a. Does everyone on the team have a flow of information and resources with at least one other person?
   b. Who is responsible for what?
   c.

Assessing your team meetings

You might disagree with some elements, or care more about others.

1. Do you review your team’s shared purpose?
2. Do you review meeting norms?
   a. What are they?
3. Do you have clear roles at the meeting?
   a. Do people have a chance to try out different roles?
4. Do you check in at the beginning?
5. Do you clarify what’s on the agenda and how long you’ll spend on parts?
6. Do you leave with action items and have a way to stay accountable for doing the things?
7. Do you check out at the end and allow people to suggest changes to future meetings?
Digging into the snowflake

1. Draw your team’s current structure
   a. Draw everyone involved even if you’re not sure where they fit in.
   b. Draw two-directional arrows between any two people who have a two-way flow of information and resources.

2. Assess your current team structure
   a. Is there a core leadership team that devises strategy? Are there distributed leadership teams that apply and test strategy on the ground?
      • If not, what can you adjust?
   b. Does the team structure reinforce mutual accountability?
      • If it doesn’t, what can you change?
   c. Do people on the team have a sustainable number of relationships so that they can check in with each other every week or two?
      • If not, what can you adjust to make it sustainable?
   d. Do people have clearly defined roles and responsibilities?
      • If not, what might you adjust?
   e. Is your team able to grow?
      • Are there any roles you need to fill to serve your purpose?
      • How do you bring in new people and keep them?

3. What team phase are you in? (See pg. 54)
   a. How do you know?
   b. What do you need to do to get to the next phase?

4. Draw a dream snowflake for your team.
   a. Some people might change roles. You might have some blank spaces that need to be filled. That’s ok!
Worksheet: Launching a Leadership Team

This worksheet will help your leadership establish a shared purpose, explicit norms, and interdependent norms. Each section has suggested timing, however feel free to adjust to your group.

Developing Shared Purpose

There are four parts to this exercise.

1. As individuals clarify your own thinking about what the purpose of your team could be as you work on a campaign together. (5 minutes).
2. As a team share your ideas, look for the common focus, and discern a purpose you can all support. (10 minutes)
3. Individually, write out a sentence that you think captures your team’s purpose. (5 minutes)
4. As a team, decide which sentence best encompasses your team’s purposes, and make any edits needed to come to a consensus. (10 minutes)

Part I: Individual Work (5 minutes)

In the first column write down the unique goal or goals of your team.

In the second column, write down who your team serves: What are the people like and what are their interests?

In the third column, write down the kinds of activities that your team could engage in to fulfill its purpose by serving this community? What is the unique work that your team could do?
Our team’s shared purpose is to...  
(briefly describe your team’s unique reason for coming together)

The community we serve is...  
(briefly describe your community characteristics)

We will achieve our shared purpose by...  
(list the specific activities that your team would undertake.)

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

Example of a purpose sentence:

Our shared purpose is to pursue educational equity by organizing Kamloops students to create their own advocacy organization by providing them with coaching, training, and mentoring.

Now fill in your first draft. Our team’s shared purpose is to...
Part 2: Teamwork (10 minutes)

As each person reads their sentence the facilitator notes the key words on a whiteboard or flipchart under purpose, community, or activities. 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 section, write a new sentence that you think can articulate a shared purpose, using some of the keywords and themes.

Our team's shared purpose is to...

Part 4: Teamwork (10 minutes)

Read your sentences again and choose – or combine – one that can best articulate the shared sense of your team.

Developing Team Norms (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 respond if a norm isn’t followed.

1. Decision-making: What is the process by which we will make decisions?
   a. Majority rules: Whatever gets the most votes wins.
   b. Consensus: Everyone must agree.
   c. Delegation: Nominate one or two people on your team to be the ultimate decision-makers.
   d. Coin flip: Leave the decision to fate!
   e. Other:

2. Discussion and Decision-making: How we will discuss options and reach decisions as a team to ensure vigorous input and debate?
   a. Always Do
• Engage in open, honest debate
• Ask open-ended questions
• Balance advocacy with inquiry
b. Never Do
• Engage in personal attacks
• Fail to listen to what others say
• Jump to conclusions

3. Meeting Management: How will we manage meetings to respect each other's time?
   a. Always Do
      • Start on time; stay on time
      • Be fully present throughout the meeting
   b. Never Do
      • Come to meetings unprepared
      • Answer cell phones or do email

4. Accountability: How will we delegate responsibilities for actions and activities? How will we follow through on commitments?
   a. Always Do
      • Clarify understanding
      • Provide follow-up on action items
      • Ask for/offer support when there is a need Weekly check-in
   b. Never Do
      • Assume you have agreement
      • Assume tasks are getting done
      • Commit to a task that you know you won’t do

5. How will you “self correct” if norms are not followed?

Understanding Team Roles (15 min.)

Review the Team Coordinator role below as an example of what roles might look like in your individual campaigns. Thinking about how you should organize the next event/meeting, discuss 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? Based on the discussion about the roles, 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. 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, be open to modifying roles and responsibilities as your team figures out how it works together best.

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Your would good for this role if...</th>
<th>Interested team members &amp; related skills and interests</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>
Tool: Spectrum of Allies

Adapted from 350.org Trainings: https://trainings.350.org/resource/spectrum-of-allies/

In many campaigns, there is a struggle between those who want the change and those who don’t, those people who are taking actions to make change a reality and those who are actively resisting change and defending the status quo.

It’s easy to focus on those two groups, yet most people are somewhere between. Our towns, cities, provinces and countries include a range of groups that can be put on a spectrum from closest to the point of view of your group to farthest away. This spectrum of allies illustrates this point. It contains five categories:

1. Active Allies: People or organizations who share your values and are actively working to create the change you want.
2. Passive Allies: People or organizations who share your values and are not currently doing anything to create the change you want.
3. Neutral: People or organizations who have not expressed support or opposition to the change you want. They may be unaware of the issue or have no opinion on it.
4. Passive Opponents: People or organizations who do not share your values and are not currently doing anything to work against the change you want and for the status quo.
5. Active Opponents: People or organizations who do not share your values and are actively working against the change you want and for the status quo.
Good news: in most social-change campaigns it is not necessary to win the opponent to your point of view. It is only necessary to move the central pie wedges one step in your direction.

This is important. If we shift each wedge one step, we are likely to win, even if the hardliners on the other side never move. By realizing we don’t need win everyone to our side, it can make our goal feel more achievable. This tool also evaluates our work. Can we show that we are measurably moving some segment of people over to our side? If not, we need to rethink our strategy.

How to use this tool

This exercise needs:

• Markers
• A sheet of flipchart paper, or a large whiteboard
• Your leadership team

Step 1: Map it out

Draw out the Spectrum of Allies on a large piece of flipchart paper or whiteboard. Gather your leadership team. On post-it notes, write out the names of individuals and groups who have influence on your campaign (or have the potential to influence your campaign). Stick the names in the appropriate wedges.

Step 2: Debrief and reflect

When finished, step back and observe your field of play. Ask yourself the following questions:
• Are there active allies who you are not coordinating or collaborating with? Where are you working in silos?
• Are there passive allies or neutral actors that you want to prioritize activating?
• Are there passive opponents you would like to neutralize?
• Are there active opponents you would like to most to passivity?

Don’t get stuck addressing every actor; instead, try to focus on a few that are the most influential.
Worksheet: Campaign Strategy Outline

Use this worksheet to summarize your campaign into one document. This can be useful for communicating your campaign to allies, and for ensuring agreement on key decisions. Remember that strategizing is ongoing: odds are some elements will change. Don’t feel pressured to use this worksheet, and if you do to keep it up to date. Only use it if it feels useful!

Who are the people?

What is the problem?

Nightmare

Dream

What is the goal?

Mountain Top Goal

Nested Goals
What are your theories of change for your first 1-3 nested goals?

If (strategy)
Then (goal)
Because (assumptions)

Nested Goal #1

If...
Then ...
Because...

Nested Goal #2

If...
Then ...
Because...

Nested Goal #3

If...
Then ...
Because...
What are your tactics?

Write it out or draw a diagram.

What is your timeline?

Write it out or draw a diagram.

Now put it all together in an organizing statement!

We are organizing (WHO) to pursue (MOUNTAINTOP GOAL) by (STRATEGY) to achieve (NESTED GOAL) by (WHEN). We will use the following tactics: (TACTICS) to achieve (KICK-OFF/PEAK) by (WHEN).
What does your team structure need to look like in order to achieve your goals?
Write it out or insert a diagram.

What is your pyramid of engagement?
Write it out or draw a diagram.