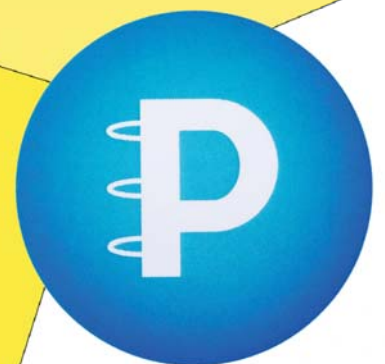


Building Skills For Change



**OLIVIA CHOW +
THE INSTITUTE FOR
CHANGE LEADERS**



ProjectOrganize



Acknowledgements

This curriculum was originally adapted from the work of Dr. Marshall Ganz of Harvard University, with resources from the Leading Change Network, and the New Organizing Institute. This also includes work by Hahrie Han, from the University of California, Santa Barbara.

It has been revised by the collective work of individuals working collaboratively from the following organizations: Dogwood Initiative, Leadnow, One Cowichan, the David Suzuki Foundation, Stonehouse Institute, and Genius.

Further revised by the collective team of Project Organize and Olivia Chow of Ryerson University.

Project Organize is a team of community activists based in Toronto, Ontario, Canada. Consisting of a diverse assortment of abilities, sexual and gender identities, races, ethnicities, educational backgrounds, classes, and more, we endeavour to reflect the communities we want to empower. They work with the administrative support of the Institute for Change Leaders at Ryerson University. The work of these volunteers is deeply appreciated. This work would not be possible without their dedication, and the Institute for Change Leaders' support.

All images, Clip Art, and designs are open-source.

Previous design and layout by Brian Chang, Chithika Withanage, Betty Won, Ben DW, Anthony Tran, Colin Burns, & Tania Liu.

Restrictions of Use

This workshop guide is provided to you pursuant to the following terms and conditions. Your acceptance of the work constitutes your acceptance of these terms. We also welcome you to use it and adapt it for your own training following terms and conditions:

- You may reproduce and distribute the work to others for free, but you may not sell the work to others.
- You may modify the work, provided that the attribution legends remain on the work, and provided further that you send any significant modifications or updates to marshall_ganz@harvard.edu or Marshall Ganz, Hauser Center, Harvard Kennedy School, 79 JFK Street, Cambridge, MA 02138, as well as to Project Organize, at changeleaders@ryerson.ca.
- You shall include a copy of these restrictions with all copies of the work that you distribute, and you shall inform everyone to whom you distribute the work that they are subject to the restrictions and obligations set forth herein.
- You hereby grant an irrevocable, royalty-free license to Marshall Ganz and New Organizing Institute, and their successors, heirs, licensees and assigns, to reproduce, distribute and modify the work as modified by you.

If you have any questions about these terms, please contact marshall_ganz@harvard.edu or Marshall Ganz, Hauser Center, Harvard Kennedy School, 79 JFK Street, Cambridge, MA 02138.

Building Skills for Change

Table of Contents

Foreword	5
Content	
Introduction to Organizing	10
Telling Stories	15
Building Relationships	22
Coaching	30
Structuring Teams	33
Strategizing	39
Acting: Tactics and Timelines	45
Tying it All Together	49
Worksheets	
Organizing Sentence	50
Telling Stories: Public Narrative	51
One-on-Ones	56
Strategy Worksheet	59
Tactics	62
Strategy: Theory of Change	65

Foreword

Hello and welcome!

Thank you for your passion for making a difference. For making your neighbourhood, your city, your country, and your world, a better place to be.

This guide was designed to help you develop your capacity for effective community organizing. Our goal is to provide you with an introduction to organizing while encouraging you to explore the following questions:

- Why am I called to leadership in my community?
- What is the source of my motivation?
- Who are my people?
- What needs to be changed?
- How will I motivate others to join with me?
- How will we develop strategies, and structure our work together?
- And how and when will we achieve our goals?

To start, here's what we mean by leadership:

Leadership is taking responsibility or enabling others to identify the change they want and empower them to achieve that change in the face of uncertainty.

And here's what we mean by organizing:

Organizing is leadership that enables your people to join forces and turn their combined resources into the power they need to make the change they want.

In this practical guide, we describe the five key practices of organizing:

- telling stories,
- building relationships,
- structuring teams,
- strategizing,
- and acting.

Taken together, these five practices are the basis of an effective organizing framework and we'll explore them in depth as we work through the framework. But where does this 'framework' come from?

Marshall Ganz, a Harvard professor, codified much of this relationship-building organizational framework. He developed the "Public Narrative" (see the Telling Stories section) based on years of organizing and researching 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. He was a key trainer and organizing strategist behind the Obama U.S. presidential campaigns of 2008 and 2012.

It was during the Obama campaigns that Ganz and literally millions of fellow organizers built on best practices and techniques of community organizing. Ganz codified these practices based on past movements, and the training programme he developed was critical to Obama's victory in the 2008 election.

Many organizations, including the Leading Change Network, grew out of these successful campaigns. Most of this guide has been adapted from their resources by Shea Sinnott and Peter Gibbs of Organize BC. We are very grateful for Peter's generosity in allowing us to adapt Organize BC's guide "Organizing: People, Power, Change."

In reading this guide, please 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 give you some additional support and serve as a resource; the best way to learn this framework is to get out and do it. And don't let them tell you that it can't be done!
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 helpful in achieving positive change.

On a more personal note, here's a third request. Have fun – savour the moments, and in the spirit of Jack Layton, be loving, hopeful and optimistic. Let's change the world – and believe me, achieving change is a lot easier when you know how to organize!

Sincerely,

A handwritten signature in black ink, appearing to read "Olivia Chow". The signature is fluid and cursive, with a large initial "O" and a stylized "C".

Olivia Chow,
Distinguished Visiting Professor, Ryerson University
Institute for Change Leaders
Curriculum Committee - Project Organize

Introduction to Organizing

"A leader is best when people barely know they exist, when their work is done, their aim fulfilled, their people will say: we did it ourselves." – Lao Tzu



Key Concepts

- **Organizing** is leadership that enables your people to join forces and turn their combined resources and interests into the power they need to make the change they want.
- Organizing is a practice with five key leadership practices: telling stories, building relationships, structuring teams, strategizing, and acting.
- The first question an organizer asks is **"who are my people?"** not "what is my issue?"
- **Strong relationships** are the foundation of successful organizing efforts.
- **The snowflake model** is an effective organizational structure that distributes power and responsibility, and prioritizes leadership development.

First, let's debunk a few myths. In any attempt to affect change, the biggest enemy is cynicism. We are regularly told that politics is not something ordinary people can be involved with, and that hope for meaningful change is just wishful thinking. This belief can become an excuse to do nothing, and to shun electoral politics and even any kind of civic engagement.

Politics, it's true, can be a sleazy business - if the only ones in power come from the well connected and the political insiders. Those who embrace the status quo want you to be cynical and skeptical. They thrive and depend on it.

Young activists may be full of compassion with an abiding desire for social justice. Yet some are disdainful of electoral politics. To them we say: Dare to be powerful, and dare to gain power. Know that power can corrupt but know, too, that power can effect change.

The key lesson is not to be discouraged, and to be as organized as possible. If you don't get a satisfactory answer the first, second, or even third time, keep asking, keep organizing, keep bringing people together. And don't expect anyone in power to make it easy or to relinquish any of his or her hold on power.

If you are interested in trying to help effect positive change, you may wonder: how do I get started? The answer is simple: change happens when individuals who are motivated take the next step and connect with others.

Begin by asking yourself, who are the people you know who experience deep injustice? Do they share the same passion to change this injustice as you? What motivates you? Then ask what is causing this problem and what needs to change. What do you want to do about it, and what result do you envision and by when? Who can you enlist to help you? Are there any existing groups out there pushing for change? Who has the power to change the current circumstance? What skills can you offer the cause?



NOTES BY JONAH EVANS, ADAPTED FROM MARSHALL GANZ' "ORGANIZING NOTES" © 2012

A Note on Communication

While this guide focuses specifically on how to organize on the ground, here are a few ideas about launching and sustaining successful media campaigns.

Whether you're trying to win over allies, pitch to the media, or influence an elected official, you need to begin by clearly defining your message. Keep it simple. Identify both the problem and the solution, and be specific. Make sure you know the history of the issue (previous debates on the issue, bills passed, the voting records of elected officials and past media coverage).

Develop an image to illustrate the issue. The polar bear is often used as a symbol of climate change. If you were looking for an image to illustrate your issue, what might work? The overarching objectives of any air campaign are these: capture the public imagination, illustrate the problem, demonstrate the solutions, draw more people to your team, and put pressure on the appropriate levels of government (and your elected representative).

If you are putting on a media conference to illustrate the issue, make the message simple. Find a backdrop that reinforces your message. Bring in people who are directly impacted by the injustice, and have them tell their stories. Prepare a full media package that includes a short press release, high-resolution photos for print and good quality video if possible. All of that could also be made available on a website.

Remember to use social media. Find creative people to help with photography, videography and web development. Send personal tweets to people who have large followings and to Facebook friends.

The media need a narrative to explain an issue. Find a personal angle, and develop a story around it. If you are organizing an event, try to get the media to talk about it in advance, and also attempt to get coverage after the event.

What is Organizing?

Organizing is leadership that enables your people to join forces and turn their combined resources 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 acting. We must learn the five key leadership practices to develop our capacity for effective community organizing.



The Five Leadership Practices

1. How to tell **your story** of why you want to organize for change, a story of the community we hope to bring together and why we're united in hope, and a story of why we must act and what needs to be done now.
2. How to **build relationships** with each other as the foundation of purposeful collective actions.
3. How to **structure** relationships to distribute power and responsibility, while fostering leadership development.
4. How to **strategize** to join forces with your people, turning your collective resources into the power that can to achieve clear goals.
5. How to enact your strategy into measurable, motivational, and effective **action**.

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

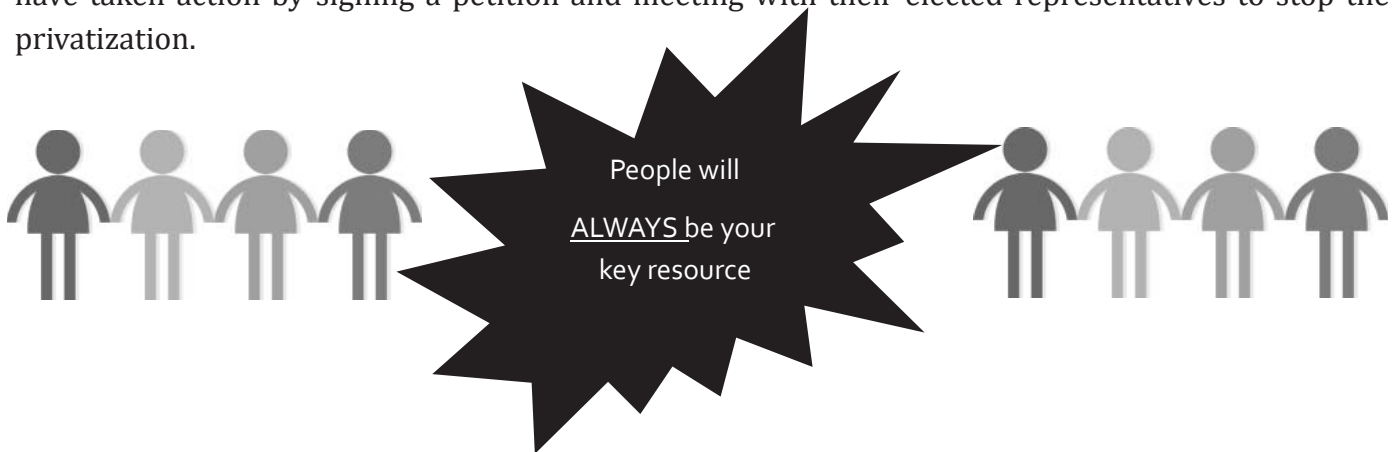
People, Power, and Change

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 a group of people with shared values and common problems to mobilize their own resources into action to solve their problem. And in doing so, that group of people empower themselves by making the change they needed.

Identifying a community of people is just the first step. The job of a community organizer is to transform a **community** – a group of people with shared values or interests – into a **constituency** – a community of people who are working together to realize a common purpose and to make change. The difference between community and constituency lies in the **commitment** to take action to achieve common goals.

For example, a community could be residents of a town who are against selling off the local water treatment plant to a private company, while a constituency would be a group of these residents who have taken action by signing a petition and meeting with their elected representatives to stop the privatization.



The Snowflake Model: A distributed approach to leadership

The organizational model that best structures relationships to develop a community into a constituency is called the ‘snowflake model’.

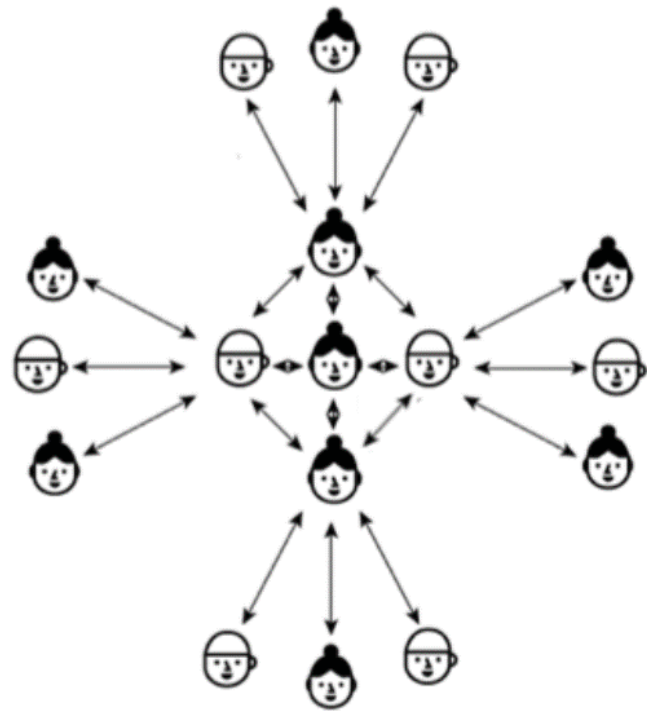
First, in the snowflake model, leadership is distributed. No one person or group of people holds all the power; responsibility is shared in a sustainable way, and the structure aims to create mutual accountability/responsibility. The snowflake is made up of interconnected teams working together to further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

Coaching is the key means by which organizers in the snowflake develop leadership. See the Coaching section for more details on what coaching in organizing is, and how to practise your coaching skills.

You'll learn about the snowflake model in greater detail in the Structuring Teams section, but for now, reflect on the organizational structures that you've been a part of at work, school, or other areas of your life. How might you visualise those structures? Where did you fit into those structures, and how did you feel in your role?

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 shared, and it prioritizes leadership development above all.



Power

“An organizer should never do for people what they can do for themselves. Instead, the job of an organizer is to empower others to be agents of change themselves.” – McKenna E., Han H.

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. Reverend Martin Luther King described power as “the ability to achieve purpose” and “the strength required to bring about social, political and economic change.”

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 public office, to make money), while resources are what people have (e.g. people, energy, knowledge, relationships, creativity, and money) that can be readily used in the case of organizing, to achieve the change you need or want.

Power is never given but needs to be seized.

We must combine interests and resources in new ways to have the power we need to bring about change. Collaboration brings interests and resources together. Transformative effects happen when people develop deep, trusting relationships with each other, and then share each other's talents, which is essential for the success of our organizing efforts.

The constituency against water privatization 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 has the resources to enable us to get what we want? What are their interests, or, what do they want? What resources do we have that they need?

In doing so, the town residents may realize that their local town council is a key actor, and that local councillors want to stay in office and need votes to do so. In turn, the constituency holds the resources of people, relationships, and votes 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’ 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.

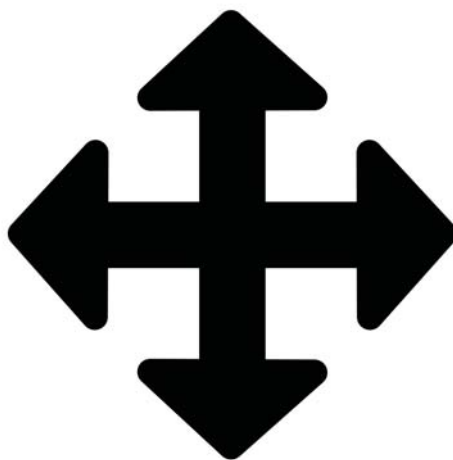
Indeed, if organizing is about enabling others to bring about change, and specifically, securing commitment from a group of people with shared interests to take action to further common goals, then it’s critical to define exactly what those goals are.

Identifying your big “mountain top goal” is important. But in order to get there you have to start with smaller, incremental (nested) goals. This is a challenge. It can be difficult to figure out what you can do, what you have to work towards, and what is just not reasonable or realistic at this moment. This is where strategy is necessary – to use what you do have to bring about the change you need and to constantly build the resources, skills, and people to make change.

Strategy is constantly changing, evolving, and being re-evaluated. This is core to being effective. So many things are going on in the broader world. In order to be relevant and effective, you have to stay in touch with all these things and respond to them when necessary.

In the case of the proposed water privatization project noted above, the constituency against the sell off must create clear, measurable goals. Note the difference between “our goal is to keep our water public” versus “our goal is to put pressure on our town council in the next 3.5 months – through door-knocking, events, local newspaper op-eds aimed at getting 1/2 of town residents to sign our petition and 1/3 of residents to meet with their councillors – to pass a motion to keep our water in public hands.”

You’ll learn how to come up with goals in the Strategizing section and how to achieve them in the Acting section.



Organizing Sentence

Organizing is leadership that enables your people to join forces and turn their combined resources and interests 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 acting. We must learn the five key leadership practices to develop our capacity for effective community organizing.

The “organizing sentence” 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 local leadership team – should write an organizing sentence unique to their team.

**We are organizing (WHO) to (WHAT OUTCOME)
through (HOW) by (WHEN).**

Or, put another way: we are organizing (our people) to (strategic goal) through (tactics) by (timeline).

For example, in a local neighbourhood, a core leadership team's organizing sentence may look like this:

We, as a core team of 5 people, are organizing 350 tenants in our public housing building to identify everything that is broken and asking that they should be fixed in the building, through door-to-door and phone canvassing, meeting other buildings' residents, forming a tenants association, staging rallies and pressuring local elected representatives and staging rallies by September 13, 2016.

To summarize, we implement tactics to be put into action we implement tactics to act and put our strategy into practice. In order to be effective, we must employ “sweet tactics” that are strategic, strengthen our organization, and develop individuals.

In turn, formulating an organizing sentence – that employs sweet tactics and is mindful of the campaign timeline – is a useful tool for guiding and focusing our organizing.



Telling Stories: Public Narrative

"If I am not for myself, who will be for me? If I am only for myself, what am I? And if not now, when?"
– Hillel (Pirkei Avot Chapter 1:14)

Key Concepts

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

The Power of Stories

We turn to storytelling in organizing to answer the question of “why?” – why we care, why the work that we do matters, and why we value one goal over another.

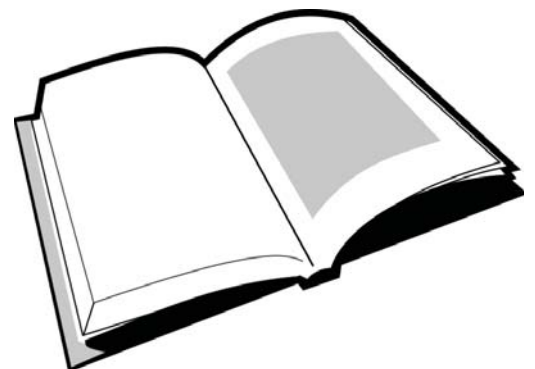
In order to motivate others to come together to work for change, we must be able to communicate our core values. We must be able to dig deep and ask ourselves: at which point in our lives did we face a challenge and make a choice that shaped our values?

We must learn how to communicate who we are and why we are so passionate about making a difference.

Listing facts and rattling off statistics will not work to recruit others to stand up against injustice.

Storytelling allows us to identify and communicate our shared values in a way that spurs us to take action together. In organizing, stories can be used as a source of inspiration, a means to engage and build relationships with one another, and most importantly, a way to provide hope so others can join in 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 now overcome together. For when we are united, we will find the moral courage to take action even when faced with seemingly insurmountable barriers.



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, we can use stories 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? And tell me about a time in your life that shaped you and motivated you to come here today.’ 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.

Stories teach us who we are — our identities — and about our shared purpose — as individuals, as communities and organizations, and as nations. There are two ways we understand the world: through our head (strategy & analysis) and through our heart (story & motivation). To enable others to achieve shared purpose, public leaders must employ BOTH the head and the heart of their constituency in order to mobilize others to act on behalf of shared values.

In this section, we’ll discuss the importance of emotion in storytelling, the structure of a story, and a framework for storytelling called “Public Narrative,” which revolves around three elements – 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.

Since storytelling in organizing is all about inspiring action, leaders must learn to **mobilize the emotions that make agency possible**. As diagram 2 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.).

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 mobilizing emotions they deem timely or relevant to motivate them to act.



Structure: Challenge, Choice, Outcome

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

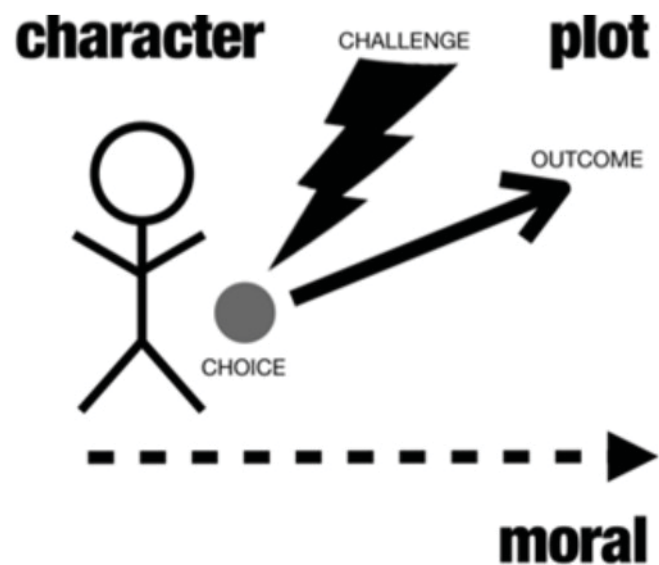
But what makes a story a story, rather than merely the recounting of an event?

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 and they become invested in the story's outcome. Challenges, choices, and outcomes are the structural elements that make stories come alive.

Remember, stories are about people. A good story allows the listener to empathise and identify with the character, and embrace the moral. We hear about someone's courage; we are also inspired by it. The story of the character and his/her choice encourages listeners to think about their own values and challenges, and inspires them with new ways of thinking about how to make choices in their own lives. 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').

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

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?



Public Narrative

Marshall Ganz created the Public Narrative framework based on the stories told by social movement leaders, and his understanding of the need for social movements to “tell new public stories.” As Ganz has written:

“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: Story of Self, Story of Us, and Story of Now. The Story of Self communicates the values that have called you to leadership; the Story of Us communicates the values shared by those in action; the Story of Now communicates an urgent challenge to those values that demands action now.

Simply put, Public Narrative says, “Here’s who I am, this is what we have in common, and here’s what we’re going to do about it.” 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 constituency.



Story of Self

Telling your Story of Self, communicates who you are, the choices that have shaped your identity, the values that guided your choices, and the lessons your choices taught you. 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 moments**” – a moment in your life when your values moved you to act in the face of challenge, when you experienced a particular 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? Where was I when I chose? How did I physically feel?

A Story of Self is not a biography, or a list of all the difficult moments you’ve faced. Every person has many stories to tell. The key to crafting a strong story of self is to select “choice points” that are relevant to your constituency.

Once you identify a specific, relevant choice, 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 we have a responsibility to give a public account of ourselves – 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:

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?





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

Similar to your Story of Self, your Story of Us focuses on choice points, but this time, the character in your Story of Us is the community you are motivating to act, and the choices are those the community has faced. The key is to focus on telling a specific story about specific people at a specific time that can remind everyone (or call to their attention) values that you share. Telling a good Story of Us requires the courage of empathy – to consider the experience of others deeply enough to take a chance at articulating that experience.

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.”

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? What challenges has it faced?
3. What change does this community hope for and why?



By telling your Story of Now, you communicate the urgent challenge your ‘us’ faces, and the threat to your shared values that demands immediate action. Your Story of Now requires telling stories that bring the urgency of the challenge alive; urgency because of a need for change that cannot be denied, urgency because of a moment of opportunity that may not return.

The Story of Now also offers hope — not make-believe hope, but real, plausible hope, often grounded in what others are already achieving; grounded in the courage of the actions of others, and in the strategic vision of what you can achieve together.

At the intersection of the urgency and the promise of hope is a choice that must be made – to act or not to act, to act in this way or in that.

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 if we act together (the ‘dream’).

Lastly, your 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 for what this is). It’s up to you to both motivate your listeners to take action and give them a specific, concrete way to take action.

In developing your Story of Now, reflect on these questions

- 1) Why now? What is going on in the larger world that makes this important right now?
- 2) What are the risks if we don’t act?
- 3) What are the benefits if we do ask?
- 4) What are the actions we could possibly take?

Self, Us, and Now: Weaving Them Together

When woven together, your Public Narrative should highlight the common values that call you to your mission, values shared by your community, and challenges to those values that demand action now. It 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 the Public Narratives of others, reflect on the following questions:

- What values did the speaker’s story convey?
- What details reflected those values?
- What were 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?

Building Relationships

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

Key Concepts

- The **1:1 meeting** is a key tool for starting and maintaining relationships; there are three types of 1:1 meetings.
 - 1) Recruitment
 - 2) Maintenance
 - 3) Escalation
- **Testing** is the process by which, through completion of tasks and actions that you determine whether a person can take on additional work and responsibility.
- **The ladder of engagement** is an escalation tool whereby, through successful testing, you move volunteers towards leadership from a position of just participating.
- **Mobilizing** is the process of getting volunteers to complete specific, pre-determined tasks in a top-down manner.
- A **"hard ask"** is a way to ask for a commitment to a relationship.

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.

Mobilizing is commonly how volunteer coordinators or leaders get work done. They come up with tasks that need doing and find volunteers to do these tasks. While this is capable of getting work done, **it does not lead to the transformative work that we are teaching**. Organizing differs from mobilizing because it involves the **development of the person** instead of focusing solely on the tasks at hand. It is an opportunity to build and include others in the process of changemaking.

"Lone wolf" leaders are also quite common. They involve one person who does everything, or mostly everything. They believe that they are the only person who can do the task at hand and are **unwilling** to train and develop others. **This often leads to burnout**. And usually, when the "lone wolf" burns out, the work they are doing comes to a crashing halt. We want to avoid this process as much as possible.

Relationship building helps avoid burning out leaders by mentoring recruits into future leaders and thus continually building your campaign's capacity to take action in the future.

Not all relationships can and will be sustained over time. It is natural that some leaders may move away while others come forward. This process is **dynamic and constantly changing**. Be **realistic** about how much time you have to develop relationships. **Quality** matters over quantity in deep relationship building.

We cannot overemphasize **the importance of relationships in creating change**. You must spend the time thinking through how you can build relationships in order to be an effective changemaker.

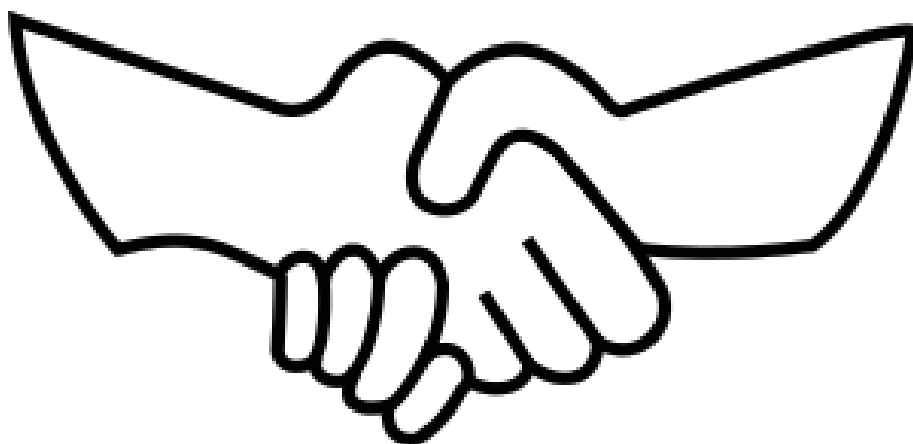
Building Internal Relationships

Relationships are rooted in shared values. We can identify values that we share by learning each other's stories, and talking about decisive moments of our life journeys that shaped who we are. The key is asking each other "why?" Why are you passionate about making a difference?

Relationships are long-term; they are not short-lived. We're not simply looking for someone to complete a task that needs doing. We're looking for people to join with us for sustained, long-term growth and action.

Relationships are created by mutual commitment. An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time. Because we can all grow and change, the purpose 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 should motivate, inspire and become an important source of continual learning and development for the individuals and communities that make up your organizing campaigns. Be conscious of how



The 1:1 Meeting (The one-on-one)

A 1:1 meeting is a tool to start, maintain, and grow relationships in organizing. These are intentional conversations. Each 1:1 meeting has four key pieces:

Purpose – Be up front from the start as to why you are meeting, in order to make sure you are both on the same page. This way, no one will be caught off guard at the end of your meeting. If you plan to ask the person you're meeting with to make a commitment at the end of your 1:1, it's ok to state this when you set up the meeting, and remind them at the beginning of your meeting.

Exploration – Most of the 1:1 is devoted to exploration by asking probing 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 important to your shared purpose (e.g., knowledge or skills they may have). If you already have a relationship, ask questions that help you understand what's going on in their life, or the challenges or success they are experiencing in their organizing.

Exchange – You exchange resources in the meeting such as information, support, and insight; you may connect your stories or provide coaching on a challenging point. This creates the foundation for future exchanges.

Commitment – A successful 1:1 meeting ends with a commitment to start working together, or an agreement to continue working together.

Three Types of 1:1 Meetings

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

1. Recruitment/Adding New Organizers 1:1

1:1 meetings happen at the start of a relationship to connect you and a new organizer and begin having a connection based on shared goals and values. The goals of a 1:1 meeting is to make a personal connection, use your personal story. Maintenance 1:1s are the primary chance to coach an organizer. identify and gauge possibilities and interests, probe for a shared experience and connect on shared values, and lastly, assist moving the volunteer to action based on what you've discussed. Think about the volunteer's ability, skills, and connections when considering how to best engage with them.

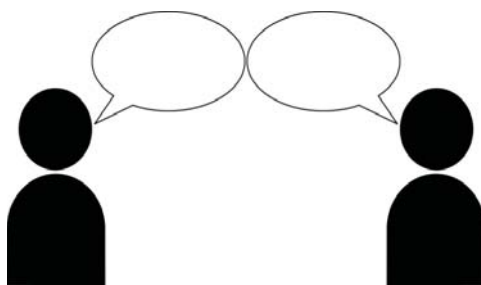


2. Maintenance/Support 1:1

1:1 meetings should occur regularly between you and each of your organizers (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 (see the Coaching section for more information on how to approach 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.

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

Because every organizer has a limited amount of time, and maintenance 1:1s need to happen

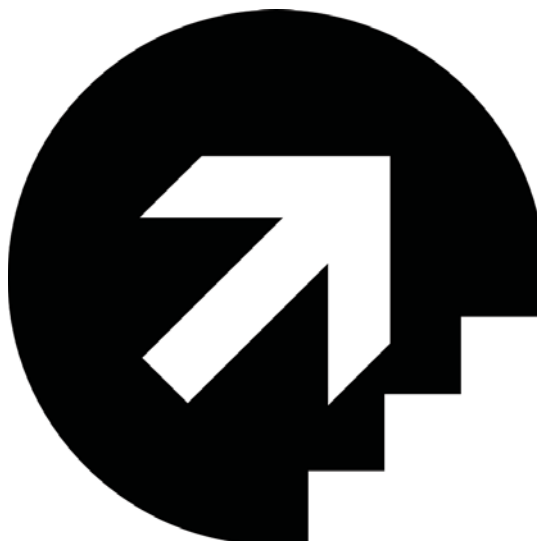


3. Escalation

These meetings are for organizers who are ready to take the next step on the “ladder of engagement” in assuming more responsibility, and taking on ownership of goals. As an organizer, it is your responsibility to identify and assess whether an organizer/volunteer is ready to become a leader. This is the concept of testing, or paying attention to demonstrated and proven skills development, and commitment to organizing.

In an escalation 1:1, name the skills the organizer already has, and actions the organizer has already taken, then suggest 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 responsibilities and expectations for this new role.

The opposite of an escalation 1:1 is that you may need to deescalate a person from a leadership position or action. There can be any number of reasons why this may happen. However, **effective use of maintenance 1:1s**, and testing, will help avoid sticky situations.



Hard Asks

When you ask someone to make a commitment – for example, 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 an ask that results in a commitment to a specific action.

Here are some best practices for a hard ask:

- Ask in **brief, plain, and specific language**.
 - Example of an effective hard ask: "Can you come to our team meeting next Wednesday at 6pm at Alisha's house?"
 - 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?"
- **Never apologize for asking:** organizing is an opportunity, not a favour. Sometimes we feel badly for asking someone to take action because we feel it is an inconvenience, when really, we're **providing the person an unique opportunity to participate and become a leader**.
- 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 house meeting), include the date, time, and location in your ask.
- **Express urgency:** Describe an urgent problem and how the person you are asking is the solution to the problem.

Three Types of "No" in Organizing

When securing a commitment to tasks, our hard asks will sometimes be met with "no". In organizing, there are three types of negative responses that you will encounter – "**not now**," "**not that**," and "**not ever**" – and being mindful of the differences will dictate how you proceed. Make sure you pay attention to what they are saying.

NOT NOW

If someone says "I'm too busy next week to help out", it is an invitation to find another time for them to get involved. For example:

- "We've got a rally next Tuesday at 2 p.m. in front of the library. I can sign you up right now."
- "I've got class from 2pm to 4pm."
- "Okay, we could definitely use help setting up the banners, and manning the tables before the rally starts, between 12 and 2pm. Can you come and help?"

NOT THAT

If someone says “No, I don’t want to do that”, it probably means “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 at the end of the month. Will you come to the planning meeting for that on Sunday at 1pm?”

NOT EVER

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!”

Be mindful: Are there barriers for this person to getting involved? Is childcare provided? Are transit tokens provided? Is food provided? Are there other unnamed barriers to getting involved such as safety? Do they need personal assistance? Know what you can offer or how you can support this person getting involved before having a 1:1 meeting.

Sample Recruitment 1:1 Agenda

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

Purpose (2 minutes) – Be upfront about your purpose for the meeting (e.g., our team needs a new canvass lead), but first, you’d like to take a few moments to get to know each other.

Exploration, Connection, and Exchange (20 minutes) – Most of the 1:1 is exploring, by asking probing questions to learn about the other person’s values and interests, as well as resources they might have. In the exchange, it’s up to you to share enough about your own values, interests, and resources so that it can be an equal exchange.

Start by asking questions like:

- “Why is this issue important enough for you to act?”
- “Can you remember the first time you stood up for something you believed in?”
- “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 or not 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.

Best Practices for 1:1 Meetings

DO

- Plan a time to have this conversation
- (usually 30-60 minutes)
- Plan to listen and ask questions
- Have a plan for your meeting – give context
- or purpose, connect with one another, and secure commitment
- Share experiences and motivations
- Describe a vision that links a shared set of
- interests for change
- Be clear about your next steps together
- Split the bill if you meet in a coffee shop or
- restaurant
- Meet in public unless you know them well
- (e.g. a coffee shop or public park)

DON'T

- Be unclear about purpose and length of
- conversation
- Try to persuade rather than listen and ask
- questions
- Chit chat about your interests and nothing else
- Skip stories to 'get to the point'
- Miss the opportunity to share ideas about
- how things can change
- End the conversation without a clear plan
- for next steps
- Pay for the whole bill (note: it can make
- the relationship feel transactional and can get expensive in the long run!)

Recruitment & Retention Best Practices

Employing 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 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.
- **Always schedule for the next time:** don't let anyone leave without asking when they'll be coming back.
- **Confirm commitment:** use a hard ask and make sure your people understand that you are counting on them. Don't assume their commitment before they confirm it.
- **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 well:** that are empowering to participate in.

Designing actions so that they are inherently motivational is a key way to keep people engaged. In organizing, it's up to you to create welcoming, organized spaces and engage volunteers so that they keep coming back. The following is a list of top reasons why volunteers don't return:

- They don't feel that it is worth their time;
- The atmosphere is disorganized, and they don't feel they're receiving attention or direction;
- No one explained to them why the work they are doing is important;
- They are uncomfortable doing what they have been asked to do;
- They feel overwhelmed by tasks and goals;
- The volunteer environment is unwelcoming;
- No one recognizes their contribution; and
- No one asked them.

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. The hard ask, the 1:1 meeting, and best practices for recruitment and retention are key ways we can secure commitment in our work.



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**
 - 1) Ask & Observe
 - 2) Diagnose
 - 3) Step In
 - 4) Act
 - 5) Check-in
- Developing a **culture of coaching** is key for building effective teams.

What is Coaching?

Coaching is essential for you to enable new leaders to transform their resources into change. In trying to create change, you will encounter challenges you did not foresee and conflicts you do not want. Coaching is how you will prepare the individuals and teams you organize with to 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 by themselves**, and use their own resources to meet challenges. The purpose of coaching is to support others build their own capacity to act, so they can coach others, and so on. In this way, coaching is similar to leadership development, and thus is a key component in building strong, supportive, and sustainable teams.

In organizing, coaching usually takes the form of a conversation with an individual or team to help others improve their effectiveness. As discussed in the previous section, maintenance 1:1s gives you your primary opportunity to coach an organizer.



Effective Coaching

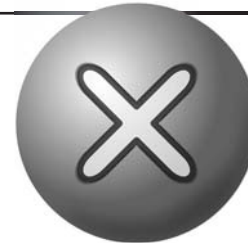
Coaching is:

- Being present and listening.
- Providing a space for your coachee to speak and be heard.
- Asking questions that both support and challenge the person you are coaching.
- Helping the coachee explore their challenges and successes.
- Supporting the coachee to identify resources and find solutions to the challenges themselves.



Coaching is not:

- Providing solutions before hearing / observing the obstacles.
- Being an expert or having all the answers.
- Telling the coachee what to do.
- False praising the coachee because you don't want to hurt their feelings or solely criticizing the coachee for their weaknesses.
- Identifying the challenge and coming up with the solution yourself.



Coaching: A Five-Step Process

1. Ask & Observe

When you are observing a coachee's actions, or when someone comes to you for help, your first reaction 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 dig deeper into the challenge(s) at hand. Ask yourself: what do I see and hear?

For example, is the coachee failing to plan or evaluate tactics that meet shared goals? Is the coachee expressing feelings of frustration or fatigue regarding canvassing? 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 to simply support the coachee in discovering the nature of the obstacle they're facing. One skill to help both coach and coachee uncover the challenge(s) is called "backtracking". 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: strategy, motivation, and skills challenge – or “head, heart, hands”. How you coach depends on the nature of the challenge. Ask yourself: what is the nature of the challenge, and how will I intervene?

In the examples above, if the coachee is failing to plan or evaluate tactics that meet shared goals, you might focus on the coachee’s understanding of strategy (head) and invite them to a planning meeting. On the other hand, if the coachee is expressing feelings of frustration or fatigue in going canvassing, you might focus on the coachee’s motivation (heart) and offer encouragement. Lastly, if the coachee is struggling to complete routine tasks correctly or on time, you might focus on the coachee’s skills (hands) and offer learning or practice to make sure they have mastery over their responsibilities. Coaching is not just about addressing challenges and problem solving.

Curious coaching: asking questions with the aim of supporting people in uncovering their own answers – is a valuable practice in developing our stories and making strategy. On the other hand, asking coaching questions about strategic goals can be an effective way of supporting people in making effective strategy.

3. Intervene

Now it’s time to gently push the coachee to create 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 idea into practice?”
- “What is the very next step, moving forward?”
- “What resources and support do you need to complete this task?”
- “When will you do this by?”

4. Action

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?

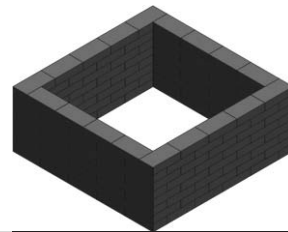
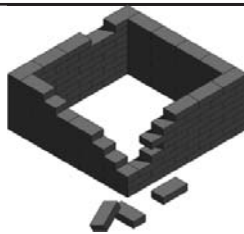
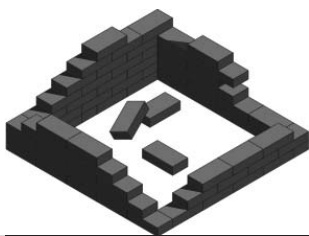
Assess whether the diagnosis of the challenge and intervention (i.e., the coachee’s plan) were successful. You may realize that you need to repeat steps 1-4 and support the coachee in coming up with a different plan for addressing the same challenge, or, it’s time to celebrate success!

Next, start again! By establishing a culture of coaching, organizers often help find solutions to each other’s challenges – this is fundamental to leadership development in organizing. plan for addressing the same challenge, or, it’s time to celebrate success!

Structuring Teams

Key Concepts

- Teams are critical to organizing, in part because they deepen relationships that help us commit to action.
- **Effective teams** require shared purpose, interdependent roles, and creating and enforcing norms.
- **The snowflake model** features:
 - 1) Mutual accountability
 - 2) Manageable number of relationships
 - 3) Clearly defined roles
 - 4) Capacity for expanding growth.
- Stages of Team Development refer to dynamic creation, enhancement, growth, and development of your team in five general phases
 - 1) Potential
 - 2) Team Formation
 - 3) Team
 - 4) Developed Team
 - 5) Team Transformation
- The **ladder of engagement** can help us effectively and gradually guide a supporter into becoming a leader and keeps us focused on skills development. Starting from the bottom:
 - Supporter
 - Volunteer Prospect
 - Team Member
 - Leadership Prospect
 - Organizer



Why Organize in Teams?

First, working in teams is more fun than working alone! Teammates also offer support and mentorship to one another, which are essential for leadership development. People who feel supported and who enjoy what they're doing are more likely to keep doing it.

Second, by working in teams, we can meet higher goals by tapping into the many different resources, including skills and knowledge, various people bring.

Finally, and most importantly, by working in teams, we develop relationships with our teammates that support and strengthen our commitment to taking action.

Features of Effective Teams

Shared Purpose



We can't start building an organization without a clear mission. A team must be clear on what it has been created to do (purpose) and who it will be doing it with (constituency/your people). Its purpose should be clear and easy to understand, while it must also be challenging and important to those on your team. Team members should be able to express their shared purpose.

A powerful organizing purpose is a response to injustice. The first step in expressing shared purpose is to identify the people you are organizing – your specific constituency, i.e., the community of people who are standing together to realize a common purpose.

Shared purpose should also be measurable: your team needs clear goals in order to measure progress.

Your Story of Now (or that of the team or group you're working with) is one way to think about a shared purpose. See the Telling Stories section for information on crafting your Public Narrative.

Interdependent Roles

Each team member must have a responsibility, i.e., their own piece of work that adds to a larger, overarching goal. In an effective team, no one works in a silo. A team that works well will have a diversity of identities, experiences, and opinions that are being brought to the table.

Creating and Enforcing Norms

Your team should set clear expectations for how to govern itself. Norms are group-approved rules and expectations on how to approach the work and one another. They can cover anything as long as they are affirmed and upheld by the group.

Teams with clear operating rules are more likely to reach 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.

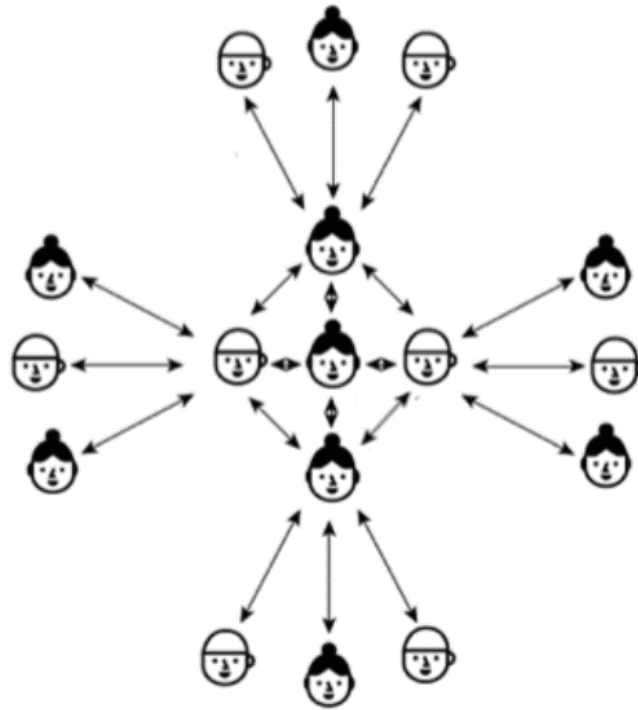


Setting norms early on in team building will guide your team in its early stages as members learn how to work together. Making norms clear allows your team to have open discussions about how things are going. The team can update and refine norms over time to improve working relationships.

Most importantly, these norms must be respected and upheld by the group. They cannot just be a list of aspirations – they must be routinely reviewed, affirmed, and enforced by the group. Your team, especially in cases where your work intersects with issues of oppression, must not reinforce the barriers you are seeking to dismantle.

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.



Features of a Snowflake

Distributed leadership: core and local leadership teams

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

Manageable 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/maintenance 1:1 meetings). As a general rule, if you are organizing full-time (i.e. committing over 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. Be realistic about the amount of functional relationships you can have.

Mutual accountability

Notice how, in the diagram, the arrows point both ways. The snowflake model doesn't operate as a hierarchy, with managers delegating tasks in a top-down way and expecting results. Instead, 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 local leadership team with a task, but someone within a local leadership team is equally as likely to assign the core leadership team with a task.

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 your team's strategy and tactics (e.g., in an electoral campaign, roles may include a canvass captain, phone captain, data captain, and a community organizer in a team leadership role). This may be more difficult to define in start-up campaigns and projects.

Capacity for 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 growth. Teams add more people, those people break off and form their own teams, and those teams form new teams, and so on.

The size of a team and its growth rate will vary from campaign to campaign. For example, teams working in the snowflake model structure have ranged in size from two or three people running a local campaign to teams of approximately 10,000 people in one state in a nationwide electoral campaign (Florida during the 2012 presidential election). That said, if implemented properly, the snowflake model has the capacity for rapid growth.

Stages of Team Development

Teams don't start off as perfect, fully-realized snowflakes. Rather, they go through different phases of growth and learning, and will experience growing pains along the way.

Phase 1: Potential

At this stage, the 'team' is in its infancy. A few excited volunteers are eager to do more, but people at this stage have limited or no involvement beyond this interest. An organizer's role is to develop this team to Phase 2 as soon as possible. To do so, the organizer will network and recruit within the community by scheduling 1:1 meetings. The organizer will organize events to meet and schedule potential new team members.

Phase 2: Team Formation

At this stage, the 'team' has a local team leader (e.g., a community organizer) but no other organizers. During this phase, the team leader has to work to start recruiting team members and begin moving them up the ladder of engagement until they become organizers. Note that this phase usually takes the longest. The establishment of norms and ground rules can begin.

Phase 3: Team

At this stage, the team has one team leader and at least one other organizer. Now, the team is official and it needs to grow to increase its potential. As more people attend events and the leaders test, escalate, and make hard asks.

The challenge for organizers in this phase is to grow and make the team more sustainable, without growing too quickly and neglecting members of the existing team. In this phase, you must reward experienced, dedicated team members by investing time and resources into maintaining your relationships with them, as well as continuing to move them up the ladder of engagement by giving them more responsibilities. 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, the team has at least four core organizers, including the team leader. If the team follows the ladder of engagement approach, it will grow into a bigger and more efficient snowflake over time.

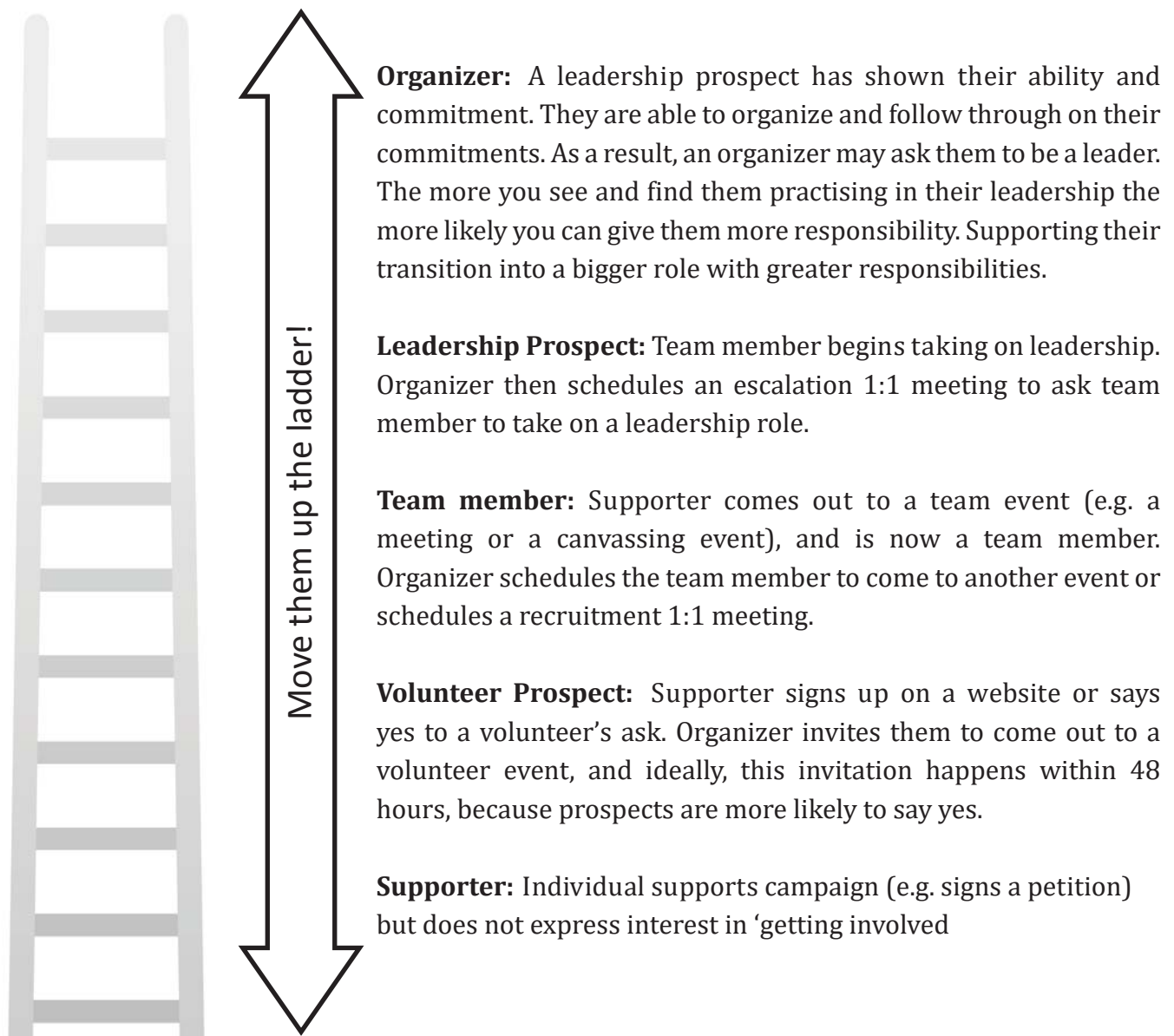
Phase 5: Team Transformation/Changes

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 neighbourhoods or regions (also known as "turfs"). Teams may split in two, with one half moving into a new turf to start a team there. Organizers must be intentional and thoughtful in supporting the transformation/changing process, as this can be a complicated time for teams and strong emotions amongst team members could come up.

The Ladder of Engagement

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

As an organizer, it's your job to identify and develop leadership in others. We call this process – where individuals take on increasing amounts of leadership – the “**ladder of engagement**.” Here's an example of a ladder of engagement (note that your ladder might look somewhat different, depending on your campaign):



*Note: Steps 4 and 5 can be repeated over and over to escalate the organizer into new roles as they take on more responsibility and become more committed.

Strategy

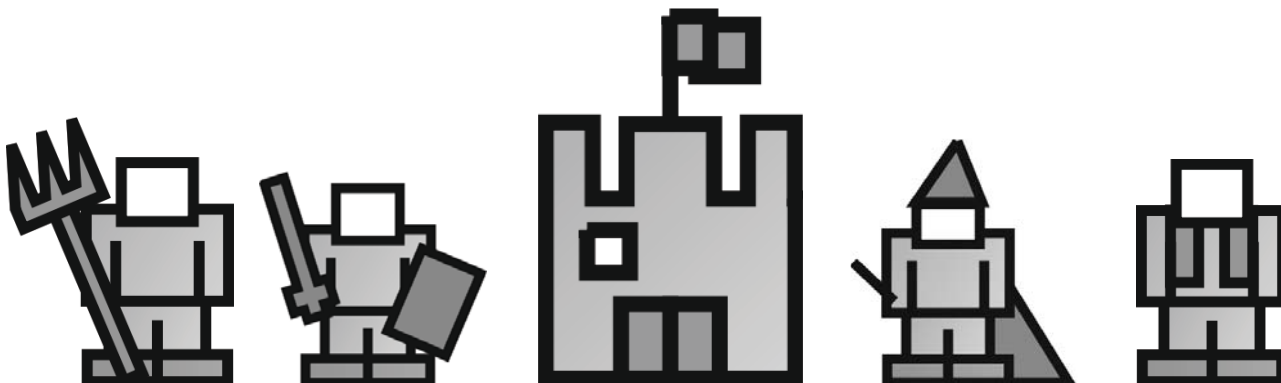
Key Concepts

- Strategy is a function of **resources** and **interests** put together to form **power**
- There are **five principles to strategy**:
 - 1) Motivated
 - 2) Intentional
 - 3) Situated
 - 4) Flexible
 - 5) Goal-Oriented
- **Strategizing in Five Steps**
 - 1) Identify Actors
 - 2) Identify Activity
 - 3) Make Clear Goals
 - 4) Identify the Power
 - 5) Theory of Change
- Strategy is made up of **big (mountain top)** and **nested, small (incremental)** goals.
- Big goals are made of smaller, measurable goals that we achieve bit by bit. Achieving incremental goals helps us work to meet our larger, mountain top goal.
- A **“Theory of Change”** statement is a summary of our strategy and a short blueprint for how we plan on making change.

What is strategy?

Simply put, strategy is turning what you have (resources and interests) into what you need (power) to get what you want (goal).

- What you have are the resources and interests already available to you: people, time, skills, money, experiences, relationships, credibility, allies, supporters, your leadership, etc.
- What you need to achieve change is power. Using the resources and interests you have strategically will allow you to exert power to reach your goal.
- What you want is the goal. The goal must be clear and measurable.



Principles of Strategy

- **Motivated:** Strategy responds to a pressing need/problem and a commitment to a solution/goal. Why is this important now? Make me care.
- **Intentional:** Strategy requires specifically choosing tactics with purpose and significance, not just because you think it will get something done. It must have purpose.
- **Situated:** Strategy does not exist in a vacuum. Supporters, opposition, and other actors must be considered. There is a context to your strategy, if you do not know your context, you cannot have a strategy.
- **Flexible:** Strategy is active and continuously responds to evaluation and shifts in the environment. Strategy isn't something you "have" or show other people. It is a process that requires monitoring, responsiveness, and action.
- **Goal oriented (incremental and mountain top):** Strategy must always be crafted with goals in mind, big or small. Strategy will be different for each goal.

Strategizing in Five-Steps

Step 1: Identify Actors

Use Worksheet: Strategy: Identify Actors, pg 47

Who is out there we should know about? When developing strategy, there are five main groups to consider: Constituency, Leadership, Supporters, Competitors, and Opposition.

Constituency: These are people who interact with your group, who have expressed interest, your friends, and your allies.

Leadership: These are the people who are actively working with you. The leadership of your group. This group is smaller than you think (but that's not a bad thing).

Supporters: These are people who may have similar values or interests but are not yet contributing to your campaign.

Competitors: These are the people who are doing the same or similar work as you. Either as a side-project or major project. They are influencing the discussions and activity around your issue.

Opposition: These are people who are actively working against you and your interests. They are the cause of your problem and may be blocking change.

Step 2: Identify the Problem

Use Worksheet: Strategy: Identify Activity, pg 60

Once we have established who the actors are, we need to figure out what the problem is. A situation has brought us together so let's figure out what it is. Why hasn't it been solved? Consider the history and context of the problem. What has been tried or not? Finally, start to think about what would it take to solve the problem?

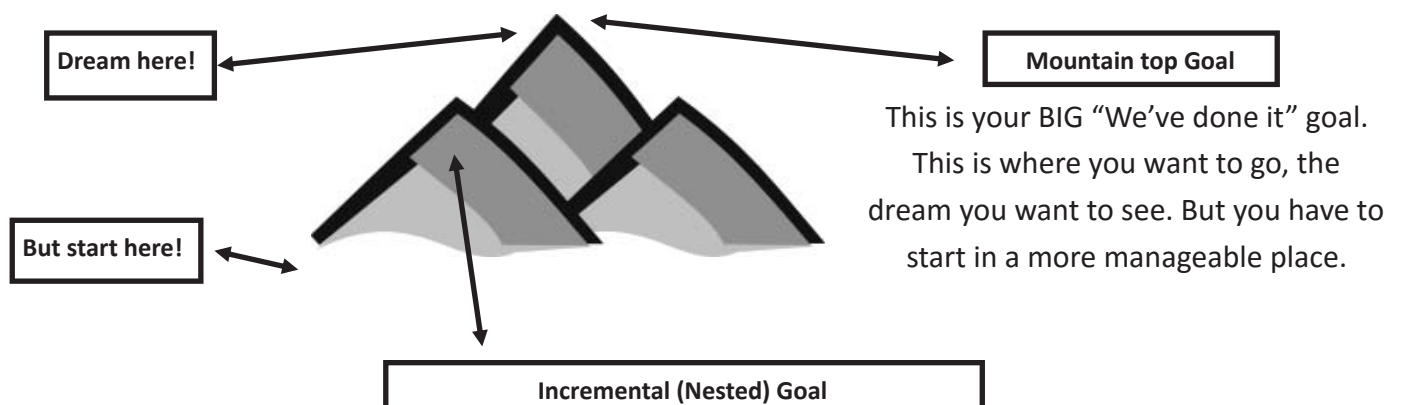
Step 3: Make Clear Goals

Strategic goals are clear and measurable. In order to reach our **big, mountain top goals**, we sometimes need to start with **smaller, incremental (nested) goals** and work our way up. Good strategy identifies the big goal but knows that the smaller goals must come first.

As a guide, goals:

- Are as **measurable** and **quantifiable** as possible (i.e., gather 1000 signatures, collect \$10,000, put in 80 hour of training)
- Focus **resources** in achieving the goal (i.e., if 1000 signatures are needed, using half the team to do phone calls won't be effective)
- **Builds capacity** in the team (i.e., continues to develop skills and learning amongst the group)
- Can be **replicated** (i.e., a great canvass kit can be used in multiple locations across the city)
- Are incremental:

Use Worksheet: Strategy: Goals, pg 64



These are incremental goals that will contribute to your "mountain top goal". But they are smaller and more manageable. These are what your strategy and tactics should focus on while keeping the larger goal in mind. Many incremental goals will make up your work.

Step 4: Identify the Power

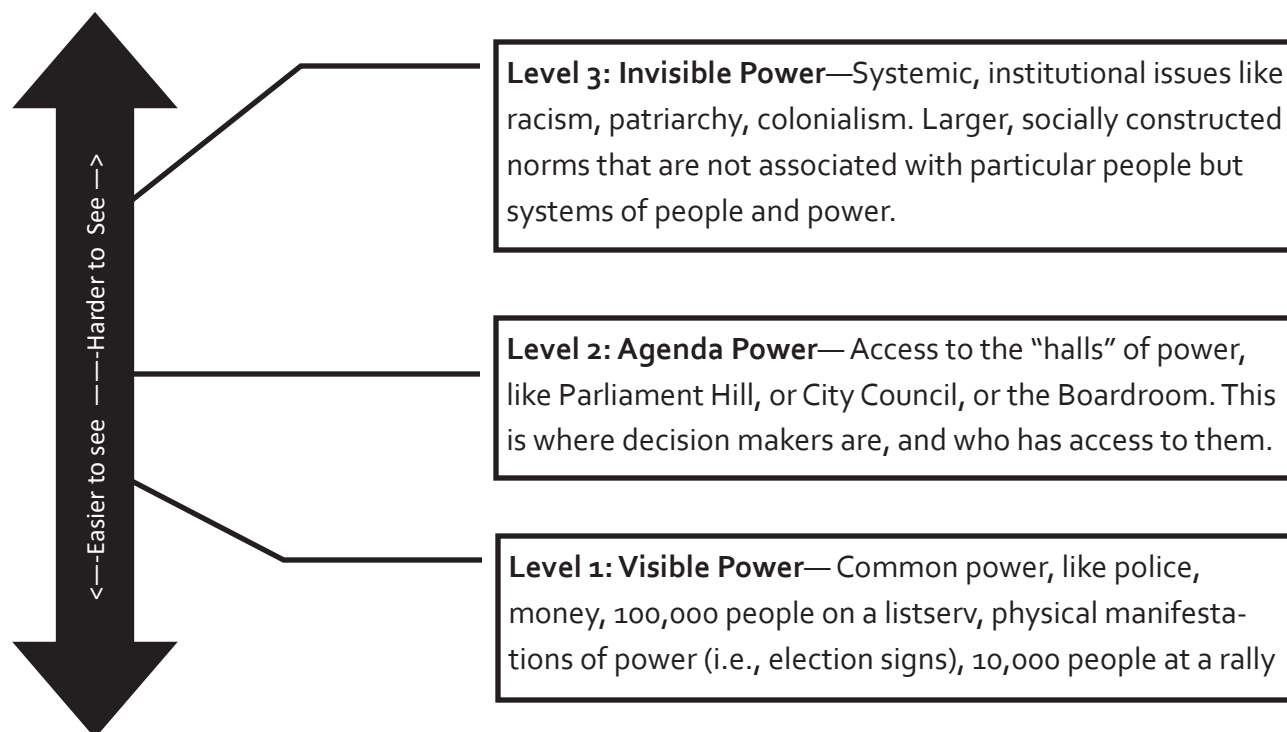
In community organizing, the theory of change is based on power relationships, and in this context, power is not something that you have by virtue of the position you hold in an organization. Instead, organizers understand power as the influence created by working with people and organizations with shared interests. The way interests and resources are combined is known as the **balance of power**. This imagines power as a fulcrum in which you use tactics to equal or outweigh the challenge your constituency is facing. Keeping this in mind, you can use power in two particular ways:

Two ways to use power

- 1) **Power With:** By working with people and organizations with shared interests, we can work in collaboration to create the transformational change we desire. Continuing the fulcrum analogy, this is like adding weight to equal the challenge your constituency faces.
- 2) **Power Over:** When others hold power and are unwilling to change, organizing to force a change is necessary. Smart tactics will shift the balance of power. Smart tactics do this by rearranging the interests and resources of your community and your opposition so your constituency can move the target who has power over you.

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

- 1) What change do you want?
- 2) Who has the authority or power to make those decisions?
- 3) What does this “authority” want or need?
- 4) What resources/power do you have that “they” want or need?
- 5) How can you use the resources you do have?



Critical to your success is political pressure.

Here are some suggestions:

Find out who is officially responsible for the file, who is the Minister in charge? Who are the opposition critics? Those in government as well as opposition parties may have a passion, a personal connection or some other investment in this issue. Find out who has the most knowledge and credibility.

Timing is critical. For instance, mount your campaign a few months before the budget period if funding is required to get something done; or before a policy or legislation is coming up for debate: When is a government making a decision? Is it around budget time, or is a policy or legislative change required?

Action is also critical. Meet with your local elected representative to press your point. Remember: your representative is your employee. You should bring to that meeting either a large group of your neighbours or a letter signed by many neighbours (try to get at least a hundred signatures). Neighbours are better than a wider community of interest or co-workers because you and your neighbours have the same employee—this MP or Councillor who may soon be up for re-election. Learn the names of all staffers at the elected official's office and thank them for facilitating this meeting. Staffers are the gatekeepers who maintain schedules and provide support and advice to the politicians.

Your demand has to be very specific and fairly practical. Such as, “Will you vote in favour of my issue, yes or no?” “Will you write a letter to the minister and make a statement in the House of Commons?” Bring with you a sample statement (the more succinct the better -- no more than a hundred words) that can be used by the politician.

Follow-up is important. With your neighbours, return to this same politician and ask for results. To make the first meeting effective, book a return date so you'll find out whether your representative made good on your requests—and so your representative knows he or she has to provide results.

And if the elected person worked hard for you and delivered results, publicly acknowledge that effort; **celebrate victories** through an event or a letter to the editor. If your representative is dead set against what you stand for, then work on your neighbours and do massive outreach so this politician can be defeated at the next election. Flex your political muscles by picking a candidate who supports your cause and get her or him elected. Finally, remember to share credit with your allies and neighbours and celebrate small victories.

Step 5: Theory of Change

Use Worksheet: Strategy: Theory of Change, pg 65

The Theory of Change is a short idea that sums up your strategy. It goes like this:



Good example

If we organize 200 students to use nickels to pay their transit fares, we will be able to persuade the Transit Authority to give students a Monthly Pass because we will be able to demonstrate how much faster students (and other passengers) can use the transit system.

In this case, the example has a clear, quantified strategic task with timeline. The goal is clear and quantified. The reasoning follows logically and reasonably from the strategy and action proposed. It is a coherent theory of change.

Bad example

If I get 5000 people to sign up by August 30th, 2016, to march against climate change in front of Suncor's Headquarters, then the Prime Minister will say no to pipelines, because he will see the power of our protest.

In this case, the strategy is vague, indeterminate, and do not draw on a credible theory of how to change the balance of power.

Theory of Change v Organizational Sentence

A Theory of Change is a directed "idea" targeted at a specific goal. It is used for determining strategy and tactics. An organizing sentence is a more broad, encompassing "idea". You should have one organizing sentence, but you can have many theories of change.

Your theory of change can help direct your choice of actions and tactics. If you have decided on a theory of change, then you should be choosing actions and tactics that are consistent. You can have multiple theories of change ongoing at the same time. Each smaller goal you are working towards should have its own theory of change. You can then use your theory of change to determine if an action is strategic and appropriate.

As organizers, your theory of change should be a thoughtful, intentional expression of what you are working towards at that moment. It is useful in keeping your work focused. With limited resources, your energy has to be used appropriately, and a good theory of change will help.

Acting: Tactics and Timelines

Key Concepts

- **Tactics**, or actions, are activities that you can do to create change
- There are three criteria for determining whether an action is effective:
 - 1) Strategic
 - 2) Strengthens the organization
 - 3) Develops individuals
- Tactics hit the **sweet spot** when all three criteria overlap
- **Well-designed tasks** have five characteristics
 - 1) Specificity
 - 2) Significance
 - 3) Variety
 - 4) Autonomy
 - 5) Feedback and coaching
- The **campaign timeline** is a strategic plotting of tactics over a set period of time

Tactics: Strategy in Action

When we put our strategy into practice, we do this by implementing tactics. Just as it's important to devise effective strategic goals, it's important to choose the most effective tactics to meet those goals. Your 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 – and thereby learning how to implement tactics skilfully and effectively – you will have wasted your time. Strategy without tactics is just a bunch of nice ideas.

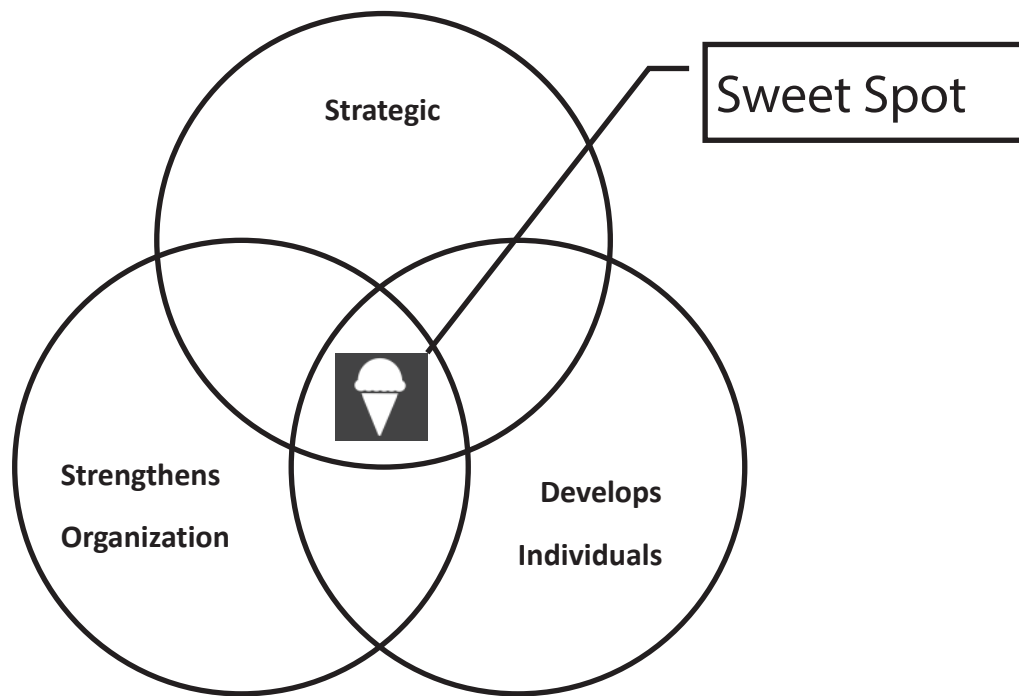
Use Worksheet: Tactics: Actions & Analysis, pg 62

The “Sweet Spot”

A tactic is most **effective** when it meets these three criteria:

- 1) Strategic: the tactic results in concrete, measurable progress toward your campaign goals.
- 2) Strengthens your organization: the tactic attracts and engages new people; it increases your community's capacity to work together to make change.
- 3) Develops individuals: the tactic builds the leadership, skills, and capacity of your people.

When choosing tactics to implement your strategy you're aiming for the “**sweet spot**” where all three overlap. Remember, 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.



Designing Good Tasks

Action requires that leaders engage others in making explicit commitments to achieve specific, measurable outcomes. But it is not just about getting people to complete tasks. Tasks must be designed by organizers with the following in mind. The following are characteristics of an effective task:

- 1) The task is specific and clear to volunteers.
- 2) The task is significant. Taking time to explain, identify, or clarify to your volunteers why tasks are significant help contribute to success. People are always more likely to participate when they feel they are truly contributing to a greater goal.
- 3) The task uses a variety of skills. An effective task will use head, heart, and hands. Tasks will appeal to different learning styles like auditory, visual, written, and kinesthetic. The task will allow your participants to try different skills and approaches.
- 4) The task has a degree of autonomy. Giving participants levels of responsibility according to their skills and abilities to achieve a particular outcome will help ensure they feel ownership of the work.
- 5) Feedback and coaching is provided to participants. Measuring success, communicating progress, and providing coaching and support are all necessary in healthy relationships and in order to develop leadership.

These characteristics lead to greater happiness, higher quality work, and greater commitment. The more we ask people to commit to actions that meet the above criteria, the more likely people are to commit and continue taking action. Nearly any action can be redesigned to provide a more meaningful experience that supports individual creativity and growth while achieving the campaign's goals.

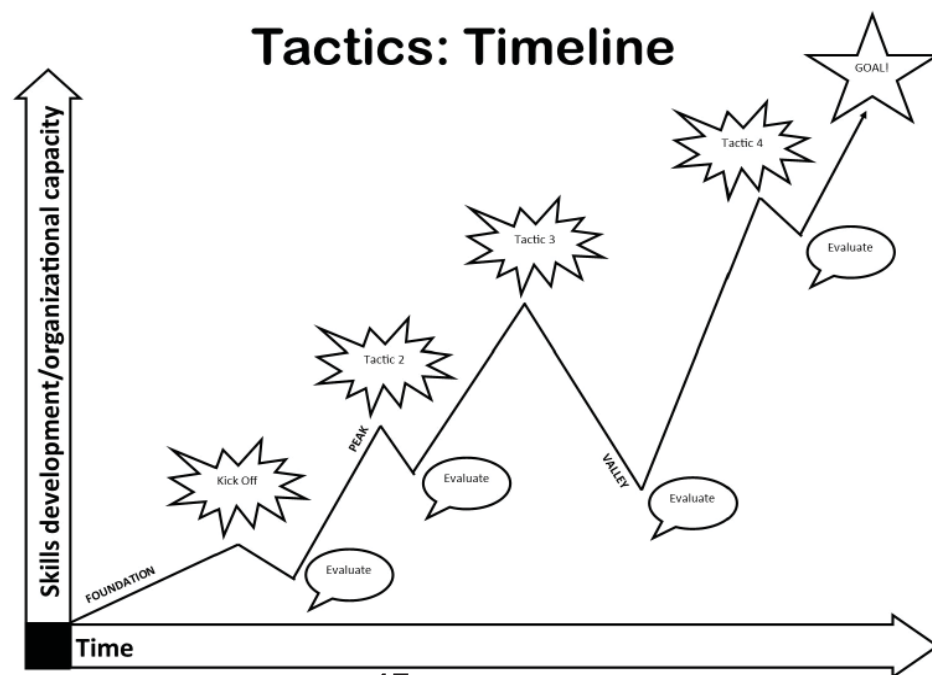
Use Worksheet: Tactics: Campaign Timeline, pg 63

The Campaign Timeline

Campaigns are very important in organizing. They are bursts of activity that are targeted towards goals. There can be many campaigns at once; some may take priority over others, but they must all contribute to a goal(s). Along the way, we will be the most successful if we continually grow our capacity and resources. As we work together, we try to build our campaigns upon one another to continuously move our capacity and resources upwards. The key to this process is constantly evaluating and learning from all tactics involved.

Timelines generally have the following features:

- **Foundation:** during this 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.' You should plan how you will focus on leadership development and capacity building.
- **Kick Off:** this is the moment at which the campaign officially begins. Setting a date for a kick-off creates urgency and focuses the concentration and commitment it takes to get things going. Choosing a tactic that supports your campaign in its infancy is also important.
- **Peaks:** campaign proceeds toward a series of peaks, each one building on what has come before. Each peak is a goal and the goals should build on one another.
- **"Mountaintop" peak:** this is the ultimate goal of the campaign. We hope to get here, but it takes a lot of work.
- **Valleys:** Tactics take time and energy from your team, and this takes time to replenish. You will often have to wait in between tactics or plan carefully to avoid burning out your team.



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.

Unsuccessful Tactics

Despite your best efforts and the hard work of your team, sometimes things don't work out. Tactics can fall flat, gather no traction, or be ineffective. But unsuccessful tactics are not always losses. Sometimes losses help galvanize your organization and can bring in new leaders. You and your team will determine amongst yourselves how to approach an unsuccessful tactic. Our recommendation is that a focus on the larger strategic framework will help put a loss in perspective. Turn this into an opportunity for learning and evaluation.



Tying it All Together

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

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

We strategize and act to wield power in organizing. We devise strategy with our people in mind. We identify the problem our community faces and use a 'theory of change' as a blueprint for making change. We implement strategy through acting via tactics and subsequently, deepen our relationships, strengthen our teams, and develop shared stories in the process.

By tying all these practices together as organizers, we embody leadership as accepting responsibility for enabling others to achieve purpose. In so doing, we work to achieve the change we want and develop others' capacities to create positive change as well. And there is nothing more rewarding than that.

This is one of the great bonuses of putting your oar in the water and pulling in the same direction with a bunch of committed people. Making change is hard work and takes time—but it can also be joyous, hopeful and a lot of fun.

Organizing Sentence

Content on pg 10

Be specific. Measureable. Reasonable. And concise.

WHO? (Who are you organizing) I am organizing:

E.g. I am organizing 5 neighbours on my street



WHAT? (Tell us the measurable goal you are trying to reach)

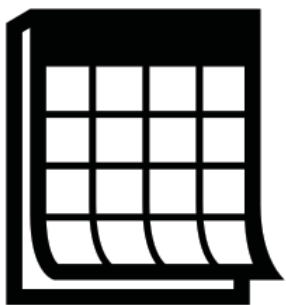
To accomplish:

to join the Bike Lane on Lakeshore Ave campaign

HOW? (What are some of the actions you can take to get what you want?)

Through doing:

through canvassing and direct action



WHEN? (Why now? What is the timeline you need to work in?)

By this time:

before the next municipal election



My Organizing Sentence

Put it all together!



Story of Self

It's all about you!

Content on pg 19



Where you come from	Who you are	How you got involved
<ul style="list-style-type: none"> - Where were you born or grow up? - Who shaped your upbringing (family, role models, friends)? - Do significant childhood experiences stick out to you (early memories, etc.)? 	<ul style="list-style-type: none"> - What are you passionate about (interests, talents, hobbies)? - Are there significant experiences that have had an impact on your choices (school, travel, work, family, or partners)? 	<ul style="list-style-type: none"> - Do significant experiences or people stick out to you that spurred you to act for the first time? - What was your first experience in organizing (volunteering, voting, attending a rally or protest)?

Your Challenge	Your Choice	Your Outcome
<ul style="list-style-type: none"> - Why did you feel it was a challenge? What was so challenging about it? 	<ul style="list-style-type: none"> - Why did you make the choice you made? How did it feel? <div data-bbox="677 1732 953 1995" data-label="Image"> </div>	<ul style="list-style-type: none"> - How did the outcome feel and why? What did it teach you?

Story of Us

Content on pg 20

1. Who are the people you want to reach with your message? What connects you to them?

2. What values do you share with your community? (the 'us' in your story)

Challenge	Choice	Outcome
What experiences have had the greatest impact on this community? What challenges do we face?	What specific choice did we make? What action did we take?	What specific change does this community hope for and why?

The Story of Now


Content on pg 21

Challenge	Choice	Outcome
<p>What will the future look like if we fail to act? What stories or images can you convey to make the challenge real for your listeners?</p> 	<p>What could the future look like if we do act?</p>	<p>What specific action are you asking your people to do? By when? How will it make a difference?</p>

Telling Your Stories—Public Narrative

Put it all together. Your story of self, us, now. And be ready to share and inspire others in your call to action.

Self	Us	Now
<p>What motivates you to be a change leader? Pick one choice that led you to be here today.</p>	<p>What values bring your community together? What change does this community hope for and why?</p>	<p>What specific action do you need people to take now? How can they do it? By when must they act?</p>



Worksheet: Coaching Stories

Step 1: Ask questions

Start by asking:

“How did that go for you? How did you feel telling your story?”

“If you were to tell it again, would you change anything in the telling?”

If yes, “what would you do differently?”

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

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

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

Step 2: Pay Attention

As you're listening, reflect on 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)?

“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...”

Practice: One-on-Ones

One-on-Ones form public relationships that build communities for action. The most important goal of this session is to practice sharing your stories and getting a commitment in a one-on-one conversation. A successful one-on-one is when you begin to build a relationship by telling/sharing your stories and you end with getting a commitment. If either piece is missing the one-on-one is not a real success.

Keep in mind a one-on-one is: a public relationship, it's probing, it's purposeful/intentional, it is scheduled with a clear location to meet and specific amount time and last it's about getting a commitment to or for specific actions.

Agenda

1.	In your team appoint a team time-keeper and note-taker	5 min
2.	Break into pairs with a person you don't know. Spend 5 minutes thinking through a rough agenda of your recruitment 1:1. This isn't a script but a chance for you to order your thoughts and create a hard ask.	4 min
3.	Practice a One-on-One, with one person as the organizer, moving the conversation from story, to identifying each other's interests and resources, to explaining the strategy, to conveying purpose and urgency, to getting commitment. The organizer fills out their sheet.	5 min
4.	Give the "organizer" who led the one on one feedback. What connected with you? What didn't? Why did you commit or not commit?	3 min
5.	Switch and have the other partner act as the organizer making their recruitment 1:1 pitch	5 min
6.	Give the "organizer" who led the one on one feedback. What connected with you? What didn't? Why did you commit or not commit?	3 min
7.	Report back to the team. Each pair reports the interests and resources they identified in each other that they will bring to the team.	15 min

Worksheet: One-on-Ones

One on One – Fill this out as the Organizer not the participant

Share your personal stories about why you're passionate about a cause you believe in. Probe with "why" questions to get to clear choice points and specific experiences that led you to make the choice.

Listen to your partner's story for resources s/he brings to their cause such as leadership skills, a following, action skills, etc. As you talk, share family stories, and the stories of your neighbourhood or community-what challenges you face, and what your hope is for your future, your community's future.

Be specific and try to avoid general topics such as health care, education or poverty in abstract ways. Rather you should talk about why you care about this specific issue because of your own life experiences or the specific experiences of people you care about.

Record here the interests that you and your partner share.

Record here the resources that your partner has, which you identified during your one on one.

Take your time building this relationship. Listen to your partner and try to understand where he or she is coming from. Then spend the last five minutes asking for commitment.

Did any of you successfully get a commitment? If so, how?

Checklist: One-on-Ones

You're going to conduct a 1:1 recruitment one-on-one. You're going to try talking to a partner and sharing key components of a 1:1. As you're going through the 1:1 try and cover as many of the best practices as possible. But remember, this is YOUR conversation. Make sure it is appropriate for you, your style, and your personality. Put a CHECK every time you cover something.

☐ Be clear about why you are meeting today

☐ Share parts of your public narrative

☐ Share experiences and motivations

☐ What resources can they offer?

☐ What resources can you offer?

☐ Find common (organizing) interests (e.g. poverty)

☐ Give context for the work you are asking them to do

☐ Find shared values

☐ Be clear about your next steps together

☐ What is your hard ask? — Don't apologize for asking!

☐ What is your back up hard ask?

☐ Get a commitment

☐ Add any more best practices you can think of:

Worksheet: Tracking Down Power

Total Time 55 min

Share Organizing Sentences (7 min)

- Share your organizing sentences
- Come to an agreement to select one campaign to focus on

Power Mapping (20 min)

- Use the chart on the following to identify people and/or organizations that are affiliated with your campaign (10 min)
- Plot the actors on your “field of play” (10 min)

Tactics

- Brainstorm Tactics on pg 62(10 min)
- Discuss which tactics best fit the tactical “sweet spot” (10 min)

Plot tactics on timeline on pg 63 (5 min)

Strategy: Identify Actors

Let's think through all the people and organizations you know working on your problem. It's important to know who is where and what they are doing on the issues.

Content on pg 40

These are the people who are **ACTIVELY** working with you. The leadership of your group. Your friends and allies. This group is smaller than you think (but that's not a bad thing).

Your Leadership:

Your Constituency:



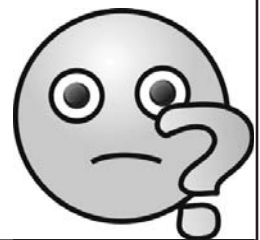
These are people who will or already like your ideas once you start reaching out to them. They aren't actively involved but they support you and the work you are doing.

Your supporters:



These are the people who are doing the same or similar work as you. Either as a side-project or major project, they are influencing the discussions around your problem.

Your competition:



These are people who are actively working against you and your interests. They are the cause of your problem and may be blocking any change.

Your opposition:



Strategy: Identify Activities

Team Changemakers: You!

Sidelines of the Status-Quo

Power
↑
↓
Power



Content on pg 40

This is the playing field. Of the people/organizations you've identified,

Where do they fit on this field of play?

Sidelines are for people who are not active.

Those who are active are right here on the field. Remember
the power dynamics!



Sidelines of the Changemakers

Team Status-Quo: Opposition

Tactics: Actions and Analysis



A tactic is a specific action that you and your team undertake to work towards your goal. Anyone can come up with tactics, but we want to choose tactics that work.

Analysis: **The Sweet Spot**

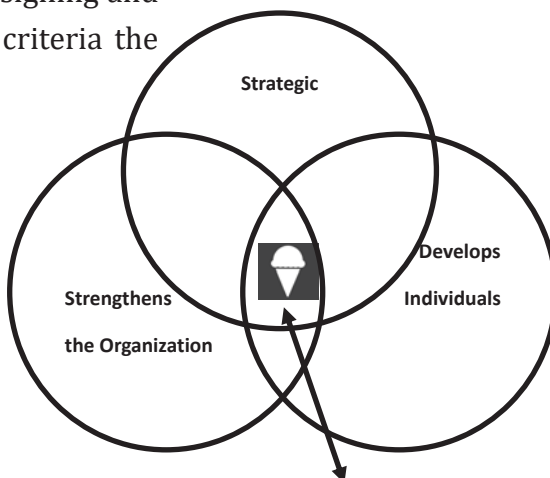
Content on pg 45

The following three criteria are important to keep in mind when designing and choosing tactics/actions. We consider tactics that meets all three criteria the best and strongest options.

Strategic: is any tactic that will have a measurable effect on the problem.

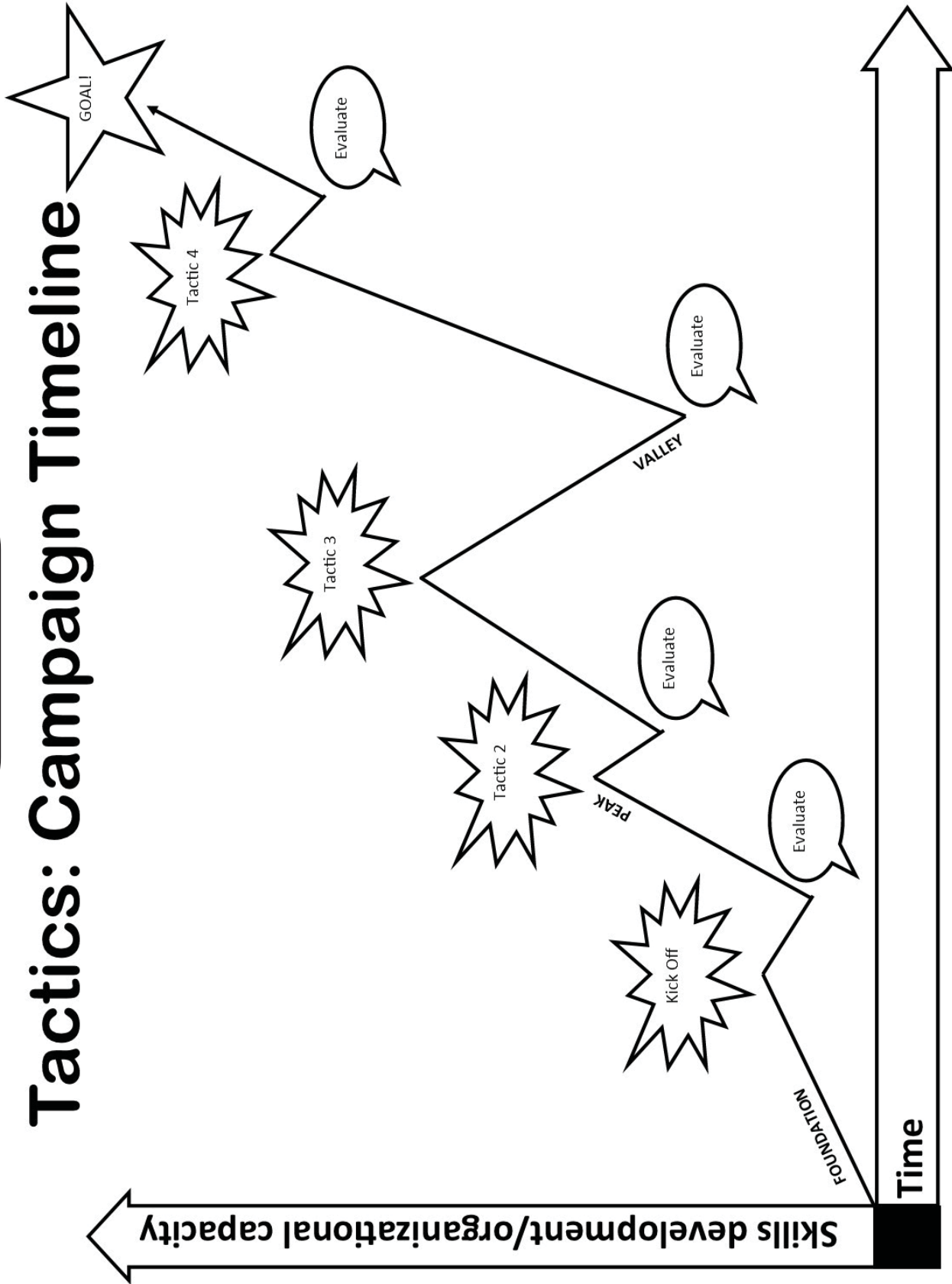
Strengthens the Organization: does this tactic/action develop and build capacity within the group? Does it enhance the ability to do more work in the future?

Develops Individuals: is there training and opportunity for growth?



Tactics/Actions	Sweet Spot (Y/N)

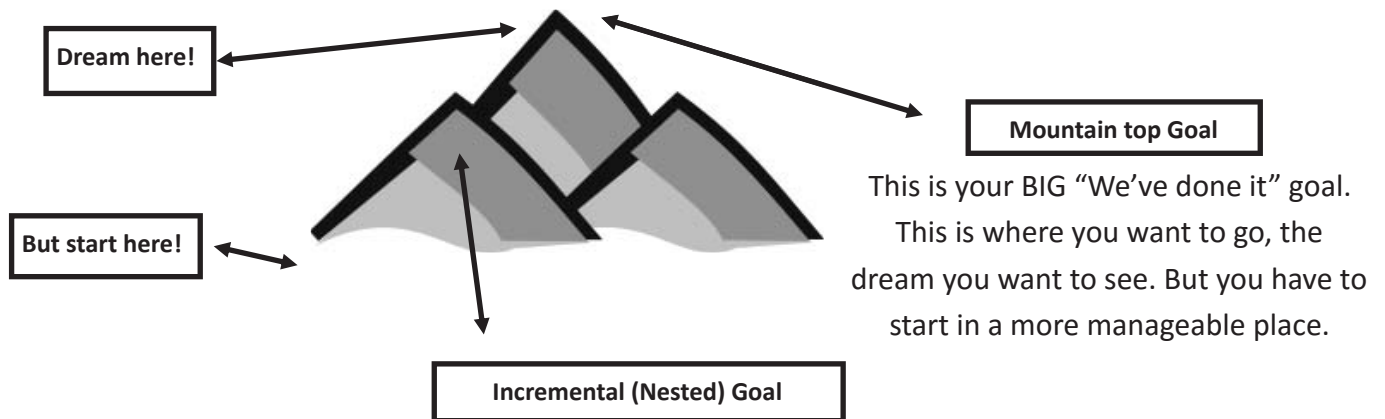
Tactics: Campaign Timeline



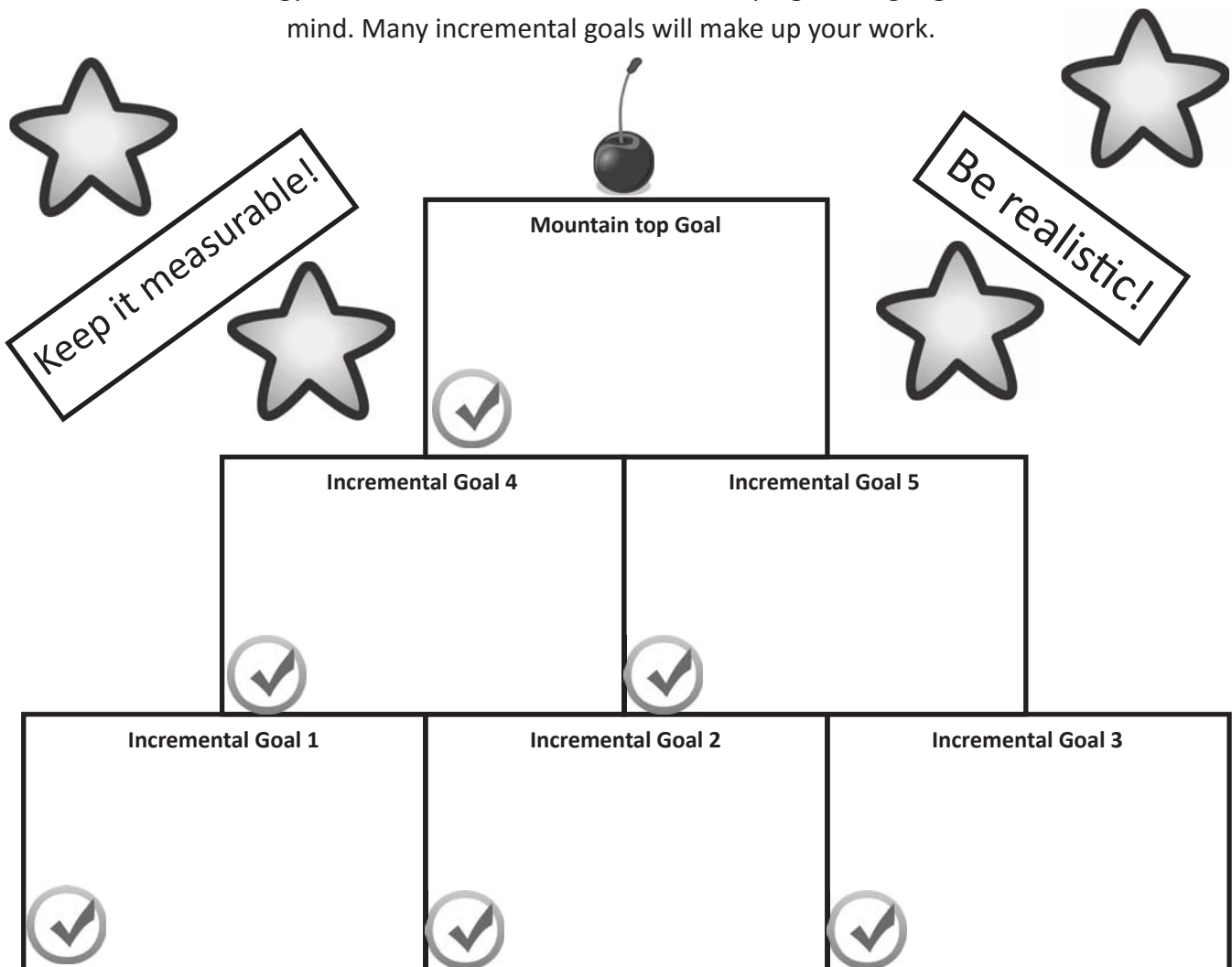
Strategy: Goals

Content on pg 41

Identifying what change we want is easy. Turning that dream into action by identifying smaller, **incremental (nested) goals** is much harder. But this is how change is made—by identifying what **incremental goals** you can achieve that will ultimately help you reach your **mountaintop goal**.



These are incremental goals that will contribute to your “mountain top goal”. But they are smaller and more manageable. These are what your strategy and tactics should focus on while keeping the larger goal in mind. Many incremental goals will make up your work.



Strategy: Theory of Change

Content on pg 42

A “theory of change” is a short sentence that sums up how the action you take will result in the change you want. It is a short, to the point, concise expression of your strategy and approach to a problem.

If (insert strategy)



Then (insert goal)



Because (insert reasoning)



Always remember to think about your work with **power** in mind

Guiding Questions

Power

What change do you want?

Who has the authority or power to make those decisions

What does this “authority” want or need?

What resources/power do you have that “they” want or need?

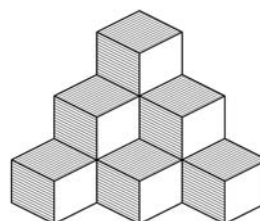
How can you use the resources you do have?

Power is **relational**. It isn't **static** and it isn't **inherent**. It changes and it changes depending on who is around, what is needed, and how dynamics are playing out.

Power is a function of **resources** and **interests**.

Limited resources **DOES NOT** equal less power.

COLLABORATION is the pooling and sharing of resources and interests.



My Theory of Change

If (Strategy):

Then (Goal):

Because (Reasoning):



Do you have further questions? Contact Changeleaders@ryerson.ca