

# ORGANIZING: PEOPLE, POWER, CHANGE



# Acknowledgements

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# **ORGANIZING:** **PEOPLE, POWER, CHANGE**

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# Foreword

*Hello and welcome!*

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

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

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

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

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

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

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

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

It was during these campaigns that Ganz and fellow organizers (note: *millions* of other organizers) built on community organizing best practices and techniques

from past movements and codified an approach to grassroots organizing and training that many credit with winning the 2008 election. Many organizations, including Leading Change Network and New Organizing Institute, spawned or grew out of these successful campaigns, and most of this guide is adapted from their resources.

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

Some call this framework the "snowflake model," others "distributed leadership," and still others "the Ganz model." Whatever we choose to call it, we hope to emphasize here that this approach is based in years and years of community organizing - we're truly 'standing on the shoulders of giants' employing this organizing framework, today.

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

1. Remember that organizing is **above all a practice**. We learn to organize by organizing, not (just) by reading about it. This guide is meant to get you started and serve as a resource, but the best way to learn this framework is to get out and do it!
2. This organizing framework is just that, **a framework, not a formula**. Our goal here is to present some concepts and tools that many organizers have found to be effective and, at times, have been instrumental in winning campaigns.

We hope you find it useful.

Sincerely,

Shea Sinnott and Peter Gibbs,  
Vancouver & Victoria, BC / Coast Salish Territories  
October 2014

# Introduction to Organizing

## Key Concepts

- Organizing is **leadership** that enables people to turn the resources they have into the power they need to make the change they want.
- Organizing is a practice, and there are **five key leadership practices** within this practice: 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 organizational structure that embodies leadership as that which enables others to achieve shared purpose in the face of uncertainty.

## What is Organizing?

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

### The Five Leadership Practices

1. How to articulate a **story** of why we are called to lead, a story of the community we hope to mobilize and why we're united, and a story of why we must act.
2. How to build intentional **relationships** as the foundation of purposeful collective actions.
3. How to create **structure** that distributes power and responsibility and prioritizes leadership development.
4. How to **strategize** turning your resources into the power to achieve clear goals.
5. How to translate strategy into measurable, motivational, and effective **action**.

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.

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

– Lao Tzu

# People

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

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

For example, a community could be residents of a town that are against a new dam project, while a constituency would be residents of the town against the dam who have signed a petition to take action to stop the dam from being built.

# Power

Organizing focuses on power: who has it, who doesn’t, and how to build enough of it to shift the power relationship and bring about change. Reverend Martin Luther King described power as “the ability to achieve purpose” and “the strength required to bring about social, political and economic change.”<sup>1</sup>

In organizing, power is not a thing or trait. Organizers understand power as the influence that’s created by the relationship between interests and resources. Here, **interests** are what people need or want (e.g. to protect a river, to stay in public office, to make money), while **resources** are assets (e.g. people, energy, knowledge, relationships, and money) that can be readily used to, in the case of organizing, achieve the change you need or want. Understanding the nature of power – that it stems from the interplay between interests and resources – and that we must shift power relationships in order to bring about change, is essential for the success of our organizing efforts.

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

In doing so, the town residents may realize that their local town council is a key actor, that local councillors want to stay in office and need votes to do so, and in turn, the constituency holds the resources of people, relationships, and votes that could shift this power relationship and bring about change.

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1 King, Martin Luther, Jr. (1967). “Where Do We Go From Here?” Annual Report Delivered at the 11th Convention of the Southern Christian Leadership Conference, Atlanta, GA. Retrieved from [http://www-personal.umich.edu/~gmarkus/MLK\\_WhereDoWeGo.pdf](http://www-personal.umich.edu/~gmarkus/MLK_WhereDoWeGo.pdf)

# 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.

In the case of the proposed dam project from above, the constituency against the dam must create clear, measurable goals. Note the difference between "our goal is to stop the dam" versus "our goal is to put pressure on town council in the next 3.5 months - through door-knocking, events, and local newspaper op-eds aimed at getting 1/3 of town residents to sign our petition - to pass a motion to stop the dam project."

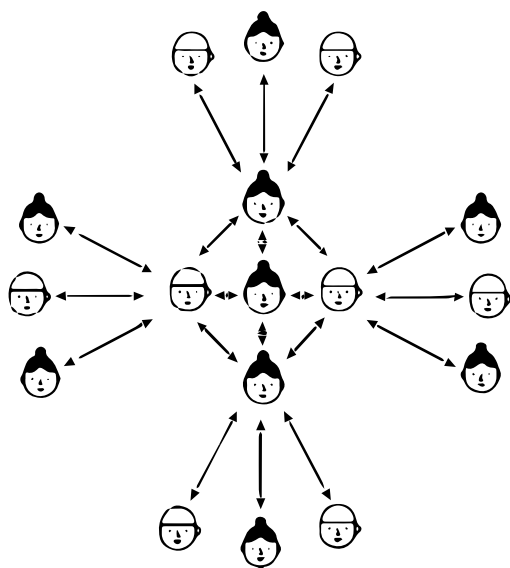
You'll learn how to come up with goals in the Strategizing section and how to achieve them in the Acting section.

## The Snowflake Model: A distributed approach to leadership

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

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

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



The practise of 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 in your work, school, or other areas of your life. How might you draw out those structures? Where did you fit into those structures, and how did you feel in your role?

Now, take a look at diagram 1. Note the faces, the clusters of faces, and the links between them. How might the snowflake model compare to the structures you've been a part of in the past? As you'll see in the Structuring Teams section, the snowflake model is unique from typical organizing or leadership structures in that responsibility is distributed and it prioritizes leadership development above all.

In closing, keep the snowflake model structure and the core tenets of people, power, and change in mind as we dive deeper into the the five practices of organizing: telling stories, building relationships, structuring teams, strategizing, and acting.

## Further Reading

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

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

For readings and training resources from the New Organizing Institute, visit <http://neworganizing.com/toolbox>



# Telling Stories

## Key Concepts

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

## Storytelling in Organizing

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

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

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

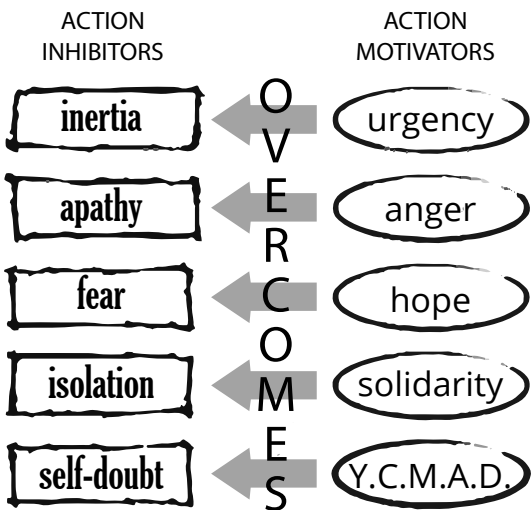
Each of us can learn to tell a story that can move others to action. We all have stories of challenge and of hope, or we wouldn’t think the world needed changing or think that we could change it. The trick is to articulate a story that communicates the values that have called us to leadership, the values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

“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)

## Emotions

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



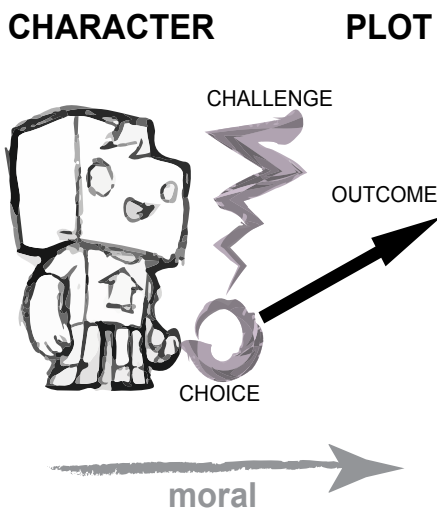
Again, storytelling in organizing is all about inspiring action, and leaders must learn to **mobilize the emotions that make agency possible**. As diagram 2 illustrates, some emotions inhibit action, while other emotions facilitate action. Action is inhibited by feelings of inertia, apathy, fear, isolation, 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.).

For instance, fear can paralyze us and drive us to rationalize inaction. Amplify this fear by feelings of self-doubt and isolation and people become victims of despair. On the other hand, hope can overcome fear, and in concert with self-esteem (Y.C.M.A.D.) and love (solidarity), these emotions can move us to act.

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 stories have similar structural elements. That is, a story is usually crafted of just three things: plot, character, and moral.



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

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

## 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.”<sup>2</sup> 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.<sup>3</sup>

The Public Narrative framework is made up of three components: **a Story of Self, a Story of Us, and a Story of Now**. A Story of Self communicates the values that have called you to leadership; a Story of Us communicates the values shared by those in action; a Story of Now communicates an urgent challenge to those values that demand action now. Note the quotation from Hillel in the opening to this section: “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?” (*Pirkei Avot* Chapter 1:14).

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 practise of crafting a narrative that bridges the self, us, and now, organizers enhance their own efficacy and create trust and solidarity with their constituency.



<sup>2</sup> Ganz, M. (2010). “Leading Change: Leadership, Organization, Social Movements” (pp. 526).

<sup>3</sup> Ibid, pp. 527.

# Story of Self

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

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

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

Some of us may think that our personal stories don't matter or that others won't care to hear them. Yet if we do community or social change work then 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?

For more help with developing your Story of Self and full Public Narrative see page 42.

# Story of Us

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

Similar to a Story of Self, a Story of Us focuses on choice points, but this time, the character in your Story of Us is the **community you are motivating to act**, and the choices are those the community has faced. That said, a compelling Story of Us doesn't just highlight challenges, it also lifts up stories of success to give people hope. As Ganz writes, "Hope is one of the most precious gifts we can give each other and the people we work with to make change."<sup>4</sup>

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?

For more help with developing your Story of Us and full Public Narrative see page 42.

# Story of Now

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

Lastly, a Story of Now makes the bridge from story, *why* we should act, to strategy, *how* we can act. Specifically, your Story of Now should end with a "hard ask" (see the Building Relationships section 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.

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

In developing your Story of Now, reflect on these questions

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

For more help with developing your Story of Now and full Public Narrative see page 42.

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

As you listen to others' Public Narratives, reflect on the following questions

1. What values did the speaker's story convey?
2. What details reflected those values?
3. What was the challenge, choice, and outcome in each part of their story?
4. What did the character in the story learn from those outcomes?
5. What was the speaker moving people to do?

For a more comprehensive guide to listening to and coaching others in telling stories, see the worksheet on page 46.

## Further Reading

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

Ganz, M. (2011). "Public Narrative, Collective Action, and Power." In S. Odugbemi and T. Lee (Eds.), *Accountability Through Public Opinion: From Inertia to Public Action* (pp. 273-289). Washington, DC: The World Bank.

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

# Building Relationships

## Key Concepts

- The **1:1 meeting** is a key tool for establishing and maintaining relationships; there are three types of 1:1s - recruitment, maintenance, and escalation.
- A **"hard ask"** is an effective way to ask for a commitment to establish a relationship.
- **Recruitment and retention best practices** can significantly increase the rate at which new people join and stay on your team.

## Why Build Relationships?

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

## Building Intentional Relationships

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

**Relationships are long term.** Organizing relationships are not simply transactional. We're not simply looking for someone to meet our ask at the end of a 1:1 meeting (read on for what this means) or house meeting. We're looking for people to join with us in 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 purposes that led us to form the relationship may change as well, offering possibilities for deeper relationships or more enriched exchange. The relationship itself becomes a valued resource.

**Relationships involve consistent attention and work.** When nurtured over time, relationships sustain motivation and inspiration and become an important source of continual learning and development for the individuals and communities that make up your organizing campaigns.

"Organizing is a fancy word for relationship-building."

– Mary Beth Rogers

# The 1:1 Meeting

The 1:1 meeting is a tool to establish, maintain, and grow relationships in organizing. Each 1:1 meeting has four key pieces:

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

**Exploration** - Most of the 1:1 is devoted to exploration by asking 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 relevant 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** - We exchange resources in the meeting such as information, support, and insight; you may connect your stories or provide coaching on a challenge. This creates the foundation for future exchanges.

**Commitment** - A successful 1:1 meeting ends with a commitment to start working together or continue working together.

## Three Types of 1:1 Meetings

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

### 1. Recruitment 1:1

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

See page 18 later in this section for a sample recruitment 1:1 meeting agenda.

### 2. Maintenance 1:1

These 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. 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.

### 3. Escalation 1:1

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 (see the Structuring Teams section for more information on the "ladder of engagement"). First, recognize the accomplishments the organizer has already made, then propose the idea of taking on this new leadership role. If all goes as planned and the organizer accepts, take the time to clearly lay out the responsibilities and expectations for this new role.

Because every organizer has a limited amount of time, and maintenance 1:1s need to happen regularly, each organizer has a limit to how many relationships they can maintain. See the Structuring Teams section for information on "sustainable relationship ratios."

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



# Hard Asks

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

- Ask in **concise, 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 we’re asking with an **opportunity** to take action.
- 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.
- **Convey urgency**: Describe an urgent problem and how the person you are asking is the solution to the problem.

## Three Types of No

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

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

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

“No, I have to work then.”

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

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

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

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

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

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

## Sample Recruitment 1:1 Agenda

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

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

**Exploration, Connection, and Exchange** (20 minutes) – Most of the 1:1 is devoted to exploration by asking probing questions to learn about the other person’s values and interests, as well as resources they might hold. In response, it’s up to you to share enough about your own values, interests, and resources so that it can be a reciprocal exchange. Start by asking questions like:

“Why is this issue important enough for you to act?”

“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 you find similarities between their story and yours, make a connection.

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

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

In this portion of the 1:1, you are trying to get them to share their Story of Self with you, and then to share your story to build a Story of Us. See the Telling Stories section for what this means.

## Best Practices for a 1:1

### Do

Schedule 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

Illustrate a vision that articulates 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

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.
- Plan for no-shows: assume that half of your people will turn up. For example, if you need four people for a successful event, plan on scheduling eight.
- Design actions that are empowering to participate in.

Designing actions so that they are inherently motivational is a key way to keep people engaged. See the Acting: Targets & Timelines section for information on "motivational engagement."

In organizing, it's up to us 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 it is worth their time
- Atmosphere is disorganized and they don't feel they're receiving attention or direction
- No one explained 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
- 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, and 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** - inquire & observe, diagnose, intervene, action, and check-in - and these five steps provide a simple framework for effective coaching in organizing.
- Developing a **culture of coaching** is key for building effective teams.

## What is coaching?

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

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

In organizing, coaching usually takes the form of an intervention (note that the process usually starts with a conversation) in an individual or team's work to support the coachee(s) in improving their effectiveness. Read on for more details on effective coaching and the coaching process.

Maintenance 1:1s are the primary opportunity to coach an organizer. See the Building Relationships section for more information on what these are, how frequently they are practiced, and why.

# Effective Coaching

## Coaching is...

## Coaching is not...

Being present and listening.

Providing solutions before hearing / observing the obstacles.

Providing a space for your coachee to speak and be heard.

Being an expert or having all the answers.

Asking questions that both support and challenge the person you are coaching.

Telling the coachee what to do.

Helping the coachee explore their challenges and successes.

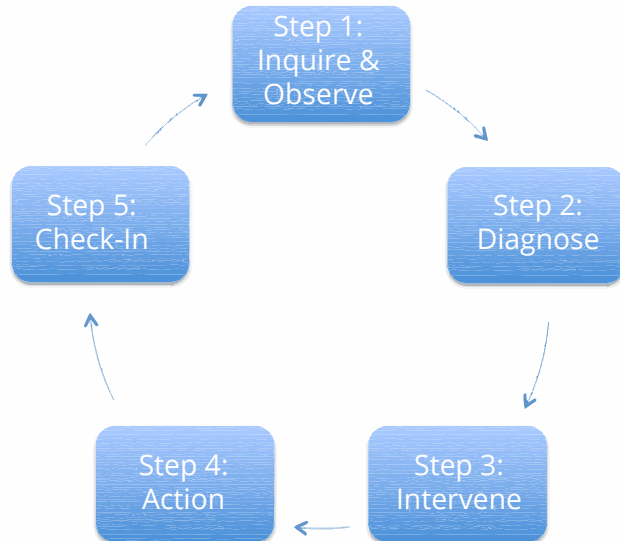
False praising the coachee because you don't want to hurt their feelings or solely criticizing the coachee for their weaknesses.

Empowering the coachee to identify resources and find solutions to the challenges themselves.

Identifying the challenge and coming up with the solution yourself.

# Coaching: A Five-Step Process

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



## 1. Inquire & Observe

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

For example, is the coachee failing to plan or evaluate tactics that meet shared goals? Is the coachee articulating 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 simply supporting 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: strategic, motivational, and skills challenges - or "**head, heart, hands**" - and how you coach depends on the nature of the challenge. *Ask yourself: what is the nature of the challenge and how will I intervene?*

Coaching is not only about addressing challenges and problem-solving. Inquisitive coaching – that is, asking questions with the aim of supporting people in uncovering their own answers – is an invaluable practice in developing our stories and devising strategy. Specifically, see the Coaching Stories worksheet on page 46 for information on how coaching can help in developing our stories. On the other hand, asking coaching questions about strategic goals can be an effective way of supporting people in devising effective strategy.

From 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 articulating 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 practise to make sure they have mastery over their responsibilities.

### 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 information into practice?"

"What is the very next step in moving forward?"

"What resources and support do you need to accomplish this task?"

"When will you do this by?"

### 4. 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!

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

### Further reading

Hackman, R and Wageman, R. (2005). A Theory of Team Coaching. *Academy of Management Review*, 30:2, 269-287. <http://amr.aom.org/content/30/2/269.abstract>

Gawande, A. (2011). Personal Best. *The New Yorker*. <http://www.newyorker.com/magazine/2011/10/03/personal-best>



# 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 explicit norms**.
- The **snowflake model** is defined by mutual accountability and commitment, a sustainable number of relationships, clearly defined roles, and capacity for exponential growth.
- The **“ladder of engagement”** can help us effectively and gradually guide a supporter into becoming a leader.

## Why Organize in Teams?

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

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

## What do effective teams have in common?

Effective teams usually have three elements in common: shared purpose, interdependent roles, and explicit norms.

### Shared Purpose

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

A compelling organizing purpose is a response to injustice. The first step in articulating shared purpose is to identify the people you are organizing – your specific constituency, or, 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 shared purpose. See the Telling Stories section for information on crafting your Public Narrative.

## Interdependent Roles

Each team member must have responsibility, or, their own piece of work that contributes to bigger goals. In an effective team, **no one works in a silo**. A functioning team will have a diversity of identities, experiences, and opinions to ensure that the most possible is being brought to the table.

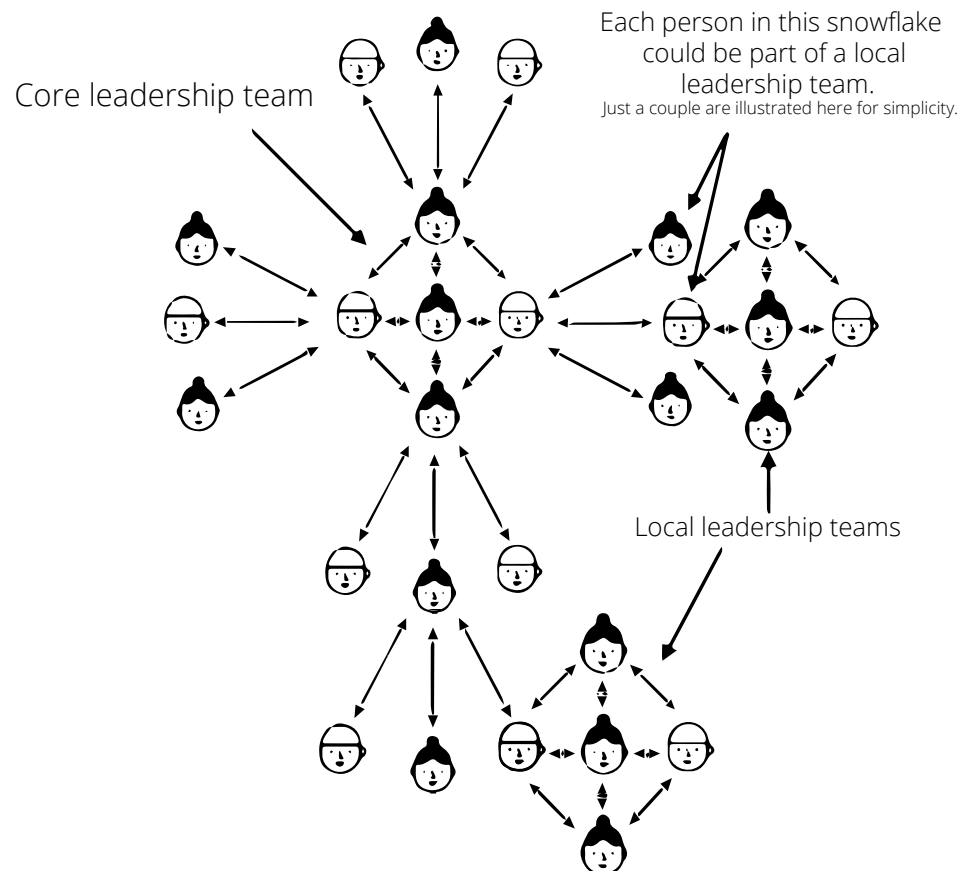
## Explicit Norms

Your team should **set clear expectations** for how to govern itself. How will you manage meetings, regular communication, decisions, and commitments? And, most importantly, how will you correct ground-rule violations so that they remain active and legitimate ground rules?

Teams with explicit operating rules are more likely to achieve their goals. Some team norms are operational, such as – *How often will we meet? How will we share and store documents? How will we communicate with others outside the team?* – while others address expectations for member interaction. Setting norms early on in team formation will guide your team in its early stages as members learn how to work together. Making norms explicit allows your team to have open discussions about how things are going. The team can update and refine norms as they work together to improve working relationships.

## The Snowflake Model: Interconnected teams

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



## Distributed leadership: core and local leadership teams

In the snowflake model, decision-making responsibility is decentralized whenever possible. The core leadership team ensures the whole organization 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 objectives. Everyone is responsible for strategizing, ongoing learning, and identifying and growing new leaders and resources. The core leadership team devises strategy, while local leadership teams test that strategy on the ground. They adapt it locally and provide feedback to improve organization-wide strategy.

## A sustainable number of relationships

In the snowflake model, each person has a sustainable number of relationships. While you are likely to interact with many people in your organizing work, it's important to focus on maintaining relationships with those on your team (one way to do this is through regular team meetings or maintenance 1:1 meetings). As a general rule, if you are organizing full time (i.e. committing 40 hours/week), then you can maintain **up to ten relationships**. If you are organizing part time, as is the case for the vast majority of grassroots organizers, you can maintain **up to five relationships**. Notice that in diagram 6, no one is connected to more than five people.

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

## 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. Rather, team members are accountable to each other, mutually agree on tasks, and expect results from and provide support to each other. Someone within the core leadership team may assign a local leadership team with a task, but someone within a local leadership team is just 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 the 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).

## Capacity for exponential growth

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

The size of a team and its growth rate will vary from campaign to campaign. For instance, teams working in the snowflake model structure 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 state during the 2012 presidential election). That said, if implemented properly, the snowflake model has the capacity to get big, and get big fast.

# The Ladder of Engagement: Recruiting organizers

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 demonstrate that they have the ability to perform the roles of each position.

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

1. **Supporter:** Individual supports campaign (e.g. signs a petition) but does not express interest in 'getting involved.'
2. **Volunteer Prospect:** Supporter signs up on a website or says yes to a volunteer's ask. Organizer invites them to come out to a volunteer event, and ideally, this invitation happens **within 48 hours**, because prospects are more likely to say yes the quicker the follow up timeframe.
3. **Team member:** Supporter comes out to a team event (e.g. a meeting or a canvassing event), and is now a team member. Organizer schedules the team member to come to another event or schedules a **recruitment 1:1** meeting.
4. **Leadership Prospect:** Team member begins taking on leadership. Organizer then schedules an **escalation 1:1** meeting to ask team member to take on a leadership role.
5. **Organizer:** Leadership prospect is able to organize. They have passed tests (read on for what this means), so organizer asks them to be a leader.

"**Passing tests**" means exhibiting ability and commitment. For example, we might ask someone to run a phone bank event - the 'test' - and see if they follow through. If a team member shows that they can follow through on commitments (i.e. the more tests they pass), the more confidence you can have in their leadership and so give them more responsibility (e.g. ask them to step up in running regular phone banks for the team as a phone bank captain).

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.

# Team Stages

Teams aren't created as perfect, fully-functioning snowflakes. Rather, they go through different phases of growth and learning, and inevitably experience growing pains along the way.

**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.

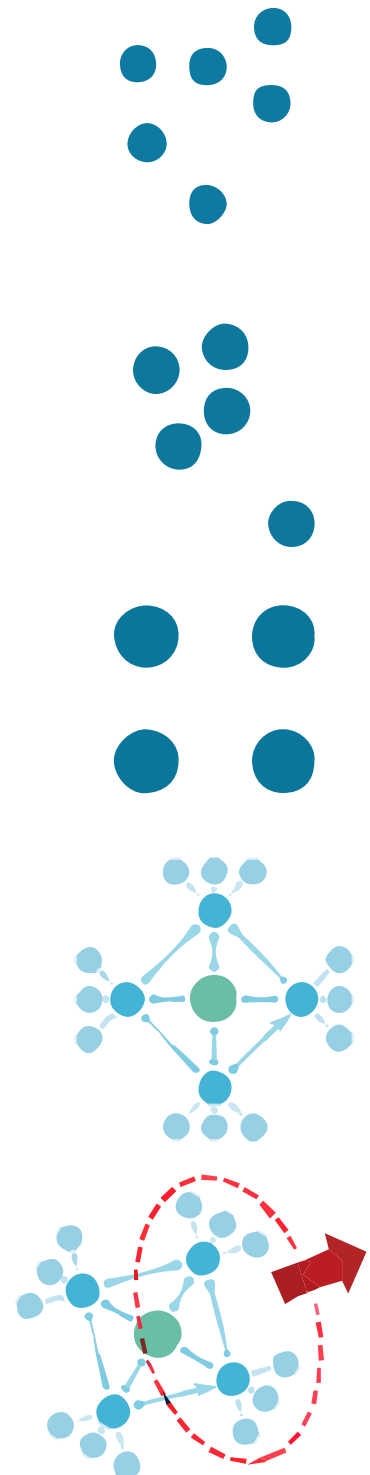
**Phase 2: Team Formation** - At this stage, the 'team' has a local team leader (e.g. a community organizer) but no other organizers. During this phase, the team leader has to work to start recruiting team members and begin moving them up the ladder of engagement until they become organizers. Note that this phase usually takes the longest.

**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 join the team, the team grows as the leaders test, escalate, and make hard asks. The challenge for organizers in this phase is to grow sustainably - that is, without growing too quickly and neglecting members of the existing team. In this phase, you must continue to invest time and resources into testing and escalating individuals that deliver. In other words, don't get hung up on people who don't show up; focus on those that do.

**Phase 4: Developed Team** - At this stage, the team is efficient and well-established. It 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** - 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 new turf to start a team there. Organizers must be intentional and thoughtful in supporting the transformation process, as this can be a complicated time for teams and strong emotions amongst team members could come up.

Above all, remember that effective teams are bolstered by strong relationships, and that in the snowflake model, leadership is distributed, and organizers are committed to developing the leadership capacity of others.



# Strategizing

## Key Concepts

- We devise strategy by asking first, “who are our **people** and what is their **problem?**” before deciding on our **goals**.
- **Strategy is made up of “nested goals”**: smaller, measurable goals that we achieve incrementally in order to meet our larger, ultimate goal.
- A “**theory of change**” statement summarizes our strategy, and provides us with a strategic blueprint for how we plan on making change.

## What is strategy and how does it work?

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

**What you have** is your **constituency’s resources**: people, time, skills, money, experiences, relationships, credibility, your allies, supporters, your leadership.

**What you need** to achieve the **change you want is power**. Power is gained through tactics that can creatively turn your resources into the capacity you need to achieve your goal.

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

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

Strategy is **motivated** by an urgent challenge

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

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<sup>5</sup> For more information on the 1956 Montgomery Bus Boycott, see Branch, T. (1989). Chapter 4: First Trombone. *Parting the Waters: America in the King Years 1954-63*. New York, NY: Simon & Schuster Inc.

Strategy is **creative**

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

Strategy is a verb, and is an **ongoing process**

Strategy is something we do, not something we have. Strategizing is not about creating a static strategic plan at the beginning of a campaign and implementing it. Rather, we continually strategize as we implement our strategic choices and change our strategy in response to what happens. In this way, we 'act our way into new thinking' rather than 'think our way into new acting.'

Strategy is **collaborative**

Strategy is most dynamic and effective when the group responsible for strategizing brings diverse experience, background, and resources to the table.

Strategy is **intentional**

Strategy is a theory of how we can turn what we have (*resources*) into what we need (*power*) to get what we want (*achieving goals*). We call this a "**theory of change**," and will discuss it later in this section.

## How to strategize

When strategizing, we ask ourselves three questions:

1. Who are our PEOPLE?
2. What is the PROBLEM?
3. What is our GOAL?

### Step 1: Who are my people?

When strategizing, there are different distinct groups we need to consider: our constituency, and within it our leadership, our supporters, our competitors, and our opposition. See page 47 in the Appendix for the "Tracking down the power" exercise to help you map out and prioritize your people.

#### Constituency

Constituents are people who have a need to organize, who can contribute leadership, can commit resources, and can become a new source of power. An organizer's job is to turn a **community** - people who share common values or interests - **into a constituency** - people who have committed to act on behalf of those values or interests.

#### Leadership

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

## Supporters

People whose interests are not directly or obviously affected may have an interest in backing an organization or effort's work. Although they may not be part of the constituency, and are not directly involved in making change, they may have similar values and resources to contribute. For example, non-indigenous Canadians that are not directly affected by infringements on aboriginal rights may have similar values and be able to contribute resources (e.g. logistical support, money) to campaigns run by Indigenous Peoples.

## Competitors

These are individuals or organizations with whom we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. For instance, two unions trying to organize the same workforce may compete or collaborate, or two community groups trying to serve the same constituency may compete or collaborate in their fundraising. When strategizing, identify competitors and, where possible, take steps to turn them into supporters.

## Opposition

In pursuing their interests, constituents may find themselves in conflict with the interests of other individuals or organizations. An employer's interest in maximizing profit, for example, may conflict with an employee's interest in earning an adequate or living wage. The interests of a Liberal candidate conflict with those of the NDP candidate in the same riding. At times, however, opposition may not be immediately obvious, and might emerge only during the course of a campaign. When strategizing, identify your opposition, consider how they will respond to your organizing, and how you can respond in turn to neutralize their oppositional actions.

## Step 2: What is the problem?

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

### What is the problem?

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

### Why hasn't the problem been solved?

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

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



## What would it take to solve the problem?

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

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

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

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

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

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

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

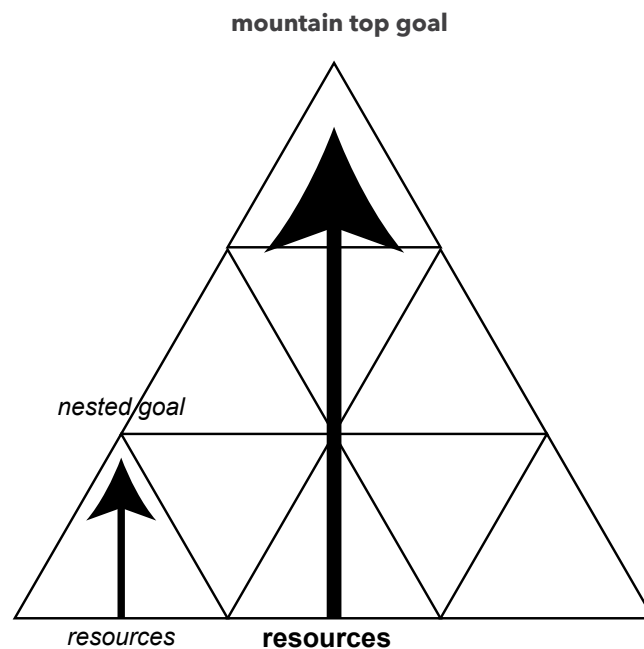
Once we have answered these questions, we’re one step closer to deciding on our strategic goal.

### Step 3: What's the goal?

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

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

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



An **effective strategic goal**:

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

## Theory of Change

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

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

A theory of change statement uses this format:

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

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

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

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

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

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

**If** we turn out more than 25,515 votes in Richmond Centre  
**then** our candidate will win the riding  
**because** that will provide us with over 50% of votes in the election in the riding.

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

# Acting: Tactics & Timelines

## Key Concepts

- For a tactic to be effective, it should be **strategic, strengthen your organization, and develop individuals.**
- To effectively engage our people in action, we need their **commitment** and to use **motivational engagement.**
- An **organizing sentence** summarizes your campaign and provides clarity on your people, strategy, tactics, and timeline.

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

## Tactics: Strategy in Action

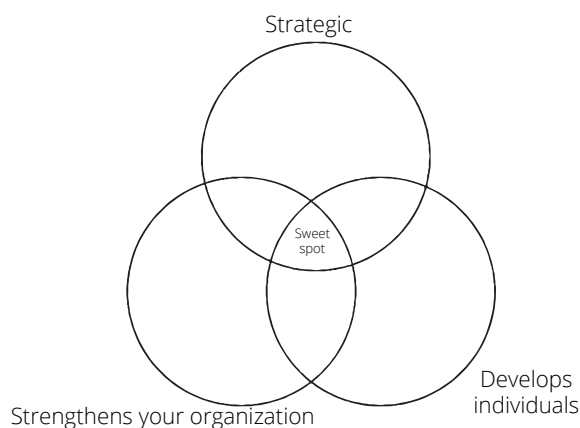
We act to put our strategy into practice, and we do this by **implementing tactics.** Just as it's important to devise effective strategic goals, it's important to choose the most effective tactics to meet those goals. Your organizing effort will quickly run into challenges if you use tactics that fail 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 skillfully and effectively - you will have wasted your time.

## The "Sweet Spot"

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

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

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



# Commitment and Motivational Engagement

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

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

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

There are three characteristics of a **motivational action**:

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

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

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

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

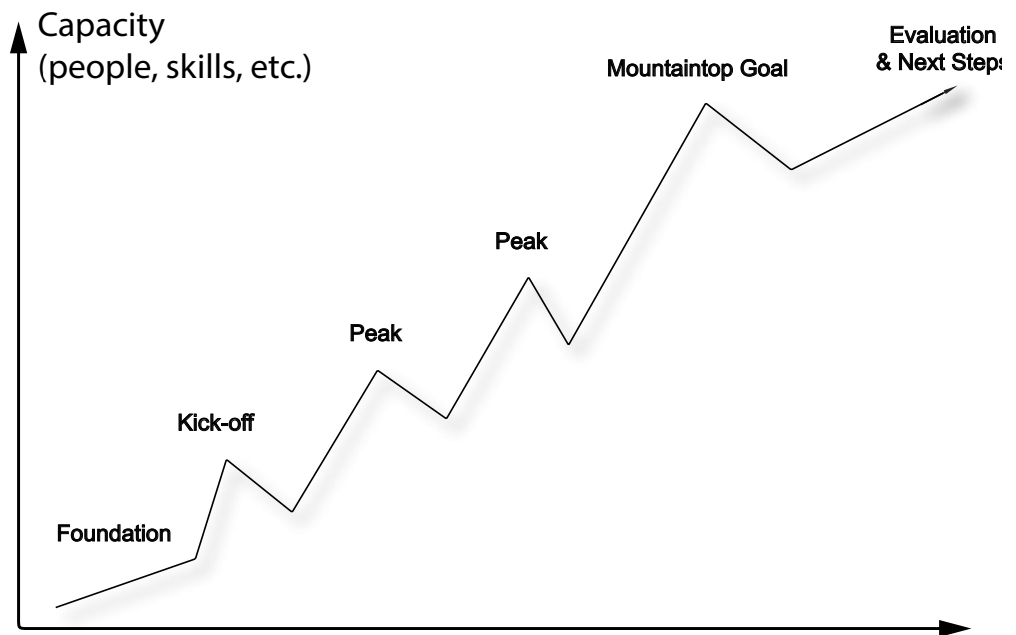
The more we ask people to commit to actions that meet these five criteria, the more likely people are to commit and continue taking action. Nearly any action can be redesigned to provide a more meaningful experience that supports individual creativity and growth while achieving the campaign's goals.

We build commitment through relationships, and the best way to secure a commitment to a specific action is by making a "hard ask." See the Building Relationships section, in particular the section on Hard Asks, for more information.

# The Campaign Timeline

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

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



## Foundation

During the foundation period, the goal is to create the capacity (or, the "power with," see the Strategizing section for more information) needed to launch a campaign. A foundation period may last a few days, weeks, months or years, depending on the scope of the undertaking and the extent to which you start 'from scratch.' Organizers prioritize relationship-building during the foundational period. This typically includes 1:1 meetings, house meetings, and meetings of small groups of supporters. You want to build as broad a base as possible while not letting things heat up too quickly. This is a crucial period for leadership development.

## Kick-Off

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

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

## Peaks

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

## The "mountain top" peak

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

## Evaluation and next steps

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

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

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

## Organizing Sentence

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 compose an organizing sentence unique to their team.

An organizing sentence looks like this:

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 provincial election, a core leadership team’s organizing sentence may look like this:

**We are organizing** *BC Liberal Party members and other supporters of a free enterprise coalition* **to** identify 805,126 voters who will pledge to vote Liberal **through** *door-to-door and phone canvassing* **by** *May 13, 2014*.

Similarly, a local leadership team’s organizing sentence in a provincial election may look like this:

**We are organizing** *BC Liberal Party members and other supporters of a free enterprise coalition in the Nechako Lakes riding* **to** identify 4,920 voters who will pledge to vote Liberal **through** *door-to-door and phone canvassing* **by** *May 13, 2014*.

To summarize, 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.

## Further Reading

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

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



# Tying It All Together

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

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

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

# Appendix

## Worksheet: Developing your Public Narrative

### Story of Self

To start in developing your Story of Self, reflect on the following 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?

Next, use the table below to dig deeper on who you are and why you're here. Write down thoughts or draw pictures to illustrate your responses.

Where you come from	Who you are	How you got involved
<ul style="list-style-type: none"> <li>- Where were you born and where did you grow up?</li> <li>- Are there people that made an impact on you while growing up (family members, community members, role models, friends)?</li> <li>- Are there significant childhood experiences that stick out for you (early memories, coming-of-age experiences)?</li> </ul>	<ul style="list-style-type: none"> <li>- What are you passionate about (interests, talents, hobbies)?</li> <li>- Are there significant experiences that have had an impact on your choices (school, travel, work, family, or partners)?</li> </ul>	<ul style="list-style-type: none"> <li>- Are there people or significant experiences that stick out for you (social movement leaders, role models, books or knowledge) that spurred you into taking action for the first time?</li> <li>- What was your first experience of getting involved in organizing (volunteering in your community, supporting an organization, voting, attending a rally or protest)?</li> </ul>

Next, based on your reflection, use the table below to write out the details of one choice point - a specific experience when you faced a challenge, made a choice, experienced an outcome, and learned a lesson.

Challenge	Choice	Outcome
<ul style="list-style-type: none"> <li>- Why did you feel it was a challenge? What was so challenging about it?</li> </ul>	<ul style="list-style-type: none"> <li>- Why did you make the choice you made? How did it feel?</li> </ul>	<ul style="list-style-type: none"> <li>- How did the outcome feel and why? What did it teach you?</li> </ul>

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

## Story of Us

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

1. What values 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?

Next, based on your responses to the above, use the table below to reflect on another choice point but this time, for your community. (Note: 'community' here can mean your group or organization, people involved in your campaign, or even the specific individual or group of people with whom you're sharing your story).

Challenge	Choice	Outcome
- What was the challenge we faced? What's the root of that challenge?	- What specific choice did we make? What action did we take?	- What happened as a result of our choice? What hope can it give us?

Your goal here is to tell a shared story that evokes shared values, illustrates the challenge(s) your community has faced or faces, and gives them hope that it can act together to make change.

## Story of Now

In developing your Story of Now, reflect on these questions

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

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

Challenge	Choice	Outcome
- What is the problem your community faces? Why is it urgent to organize now? What stories or images can you convey to make the challenge real for your listeners?	- What will the future look like if we fail to act? What could the future look like if we do act?	- What choice are you asking people to make? It is clear what form their action will take and how it fits within the bigger picture (the 'dream' of the future you've described)?

In drafting your Story of Now, remember that you're trying to paint a clear and vivid picture of the urgent challenge your community faces, what the future could look like if they join you, and what specific action your listeners can take now to make it happen. Quick tip: your Story of Now should end with a "hard ask."

## Weaving it together

Now it's time to weave Self, Us, and Now together. Use the table below to guide you. Then, it's time to try it out by practicing your full Public Narrative with others.

Self	Us	Now
<ul style="list-style-type: none"><li>- Which choices in your life have led you to be here today? Pick one or two that relate to this community and this moment.</li></ul>	<ul style="list-style-type: none"><li>- What is this community all about and which stories reveal that? What specifically moves you about this community?</li></ul>	<ul style="list-style-type: none"><li>- What challenges make you feel enough (or angry enough) to act? What gives you hope? What specific choice are you asking people to make?</li></ul>

# Worksheet: Coaching Stories

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

## 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 following elements of the story and ask yourself the attendant questions. Repeat some of your reflections back to the storyteller using the sample statements.

### A. Challenge, choice, outcome.

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

"When you described \_\_\_\_\_, I got a clear picture of the challenge."

"I understood the challenge to be \_\_\_\_\_ and the choice to be \_\_\_\_\_. Is that what you intended?"

"How would you describe the outcome of your choice? I heard \_\_\_\_\_ or learned \_\_\_\_\_, is that what you intended?"

### B. Values.

- Could you identify the storyteller's values and where they come from?
- Did you hear the storyteller voice or describe certain emotions? How did the story make you feel?

"It's clear from your story that you value \_\_\_\_\_."

"Your description of that value / emotion resonated with me because..."

### C. Details & Setting.

- What were the sections of the story that had especially vivid details? What did these descriptions do or how did they make you feel?

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

## Step 3: Tell them what you'll remember.

Tell the storyteller what stood out for you or resonated with you, and what you will remember.

"Your description of detail / image / feeling stood out for me, because..."

"The story hooked me at \_\_\_\_\_ point, because..."

# Worksheet: Tracking down the power

Here is an exercise to help you identify important people or groups when strategizing, and when designing and implementing tactics.

This exercise needs:

- Markers
- Post-it notes
- Two sheets of flipchart paper or a large whiteboard or blackboard
- Your leadership team

## Step 1: Map the actors

Draw the diagram from the following page ("Map the Actors") on a large piece of flipchart paper or whiteboard. Gather your leadership team. On post-it notes, write out the names of individuals and groups who have influence on your campaign (or have the potential to influence your campaign). Stick the names in the appropriate ovals in the "Map the Actors" diagram you've drawn out. Refer to the "Step 1: Who are my people?" portion of the Strategizing section to guide you.

## Step 2: Field of Play

Now, draw the "Field of Play" diagram on a large piece of flipchart paper or whiteboard. Take the actors you mapped out and put them on the field. The field of play is a spectrum – ranging from those with the greatest interest in change to those with the greatest interest in the status quo. Place each post-it note from your map of actors onto the field of play along the spectrum. As you go, ask if each actor is currently taking action on the issue (whether in support of or in opposition to your goals), or if they are 'on the sidelines.'

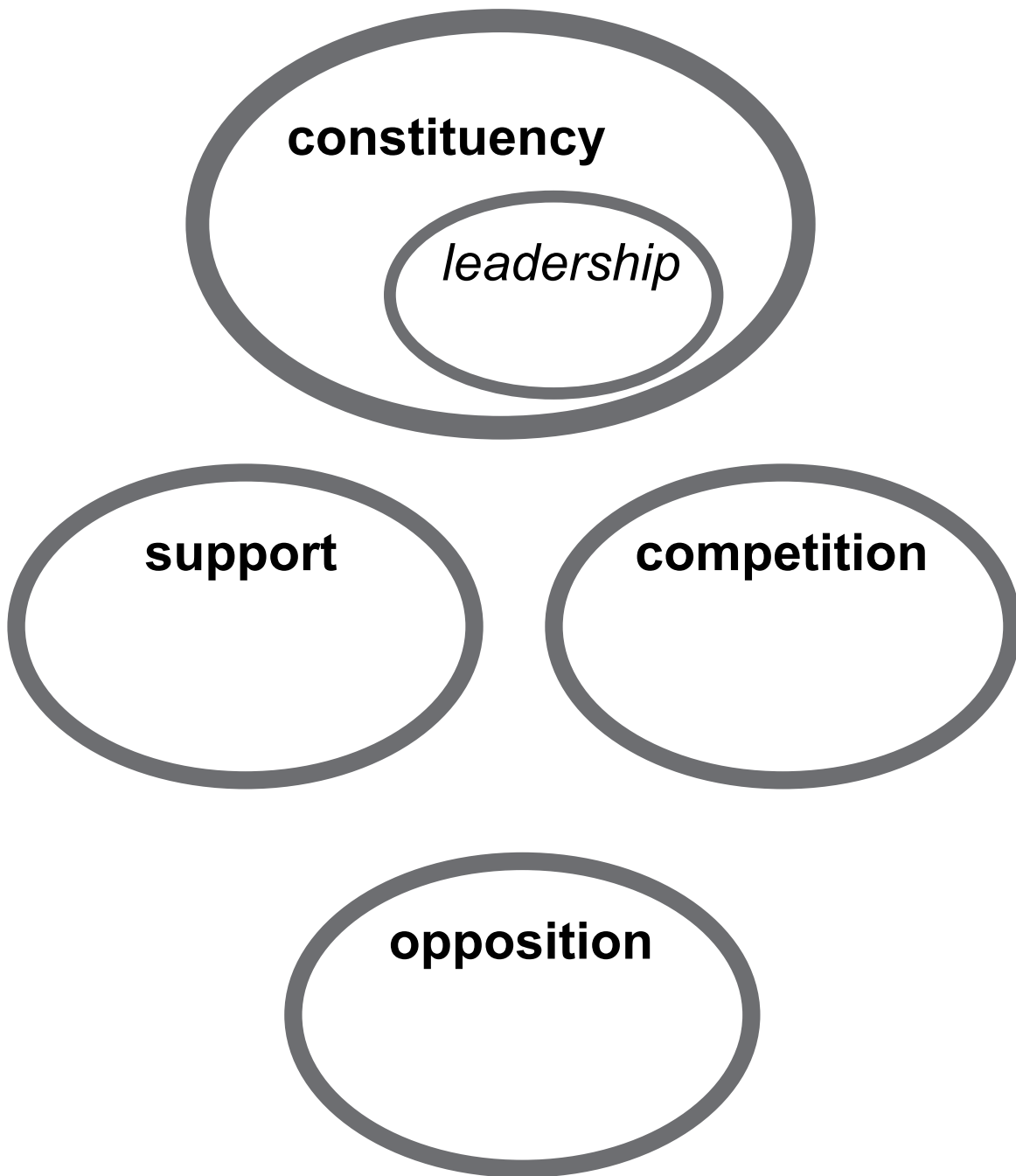
## Step 3: Debrief and reflect

When finished, step back and observe your field of play. Ask yourself the following questions:

- Are there key supporters on the sidelines?
- What would it take to get those key supporters off the sidelines?
- Are there influential competitors taking action in conflict with your goals?
- What steps could be taken to convert them to supporters or to your constituency?
- Are there effective opposition groups taking action?
- What steps could be taken to neutralize or overcome their efforts?

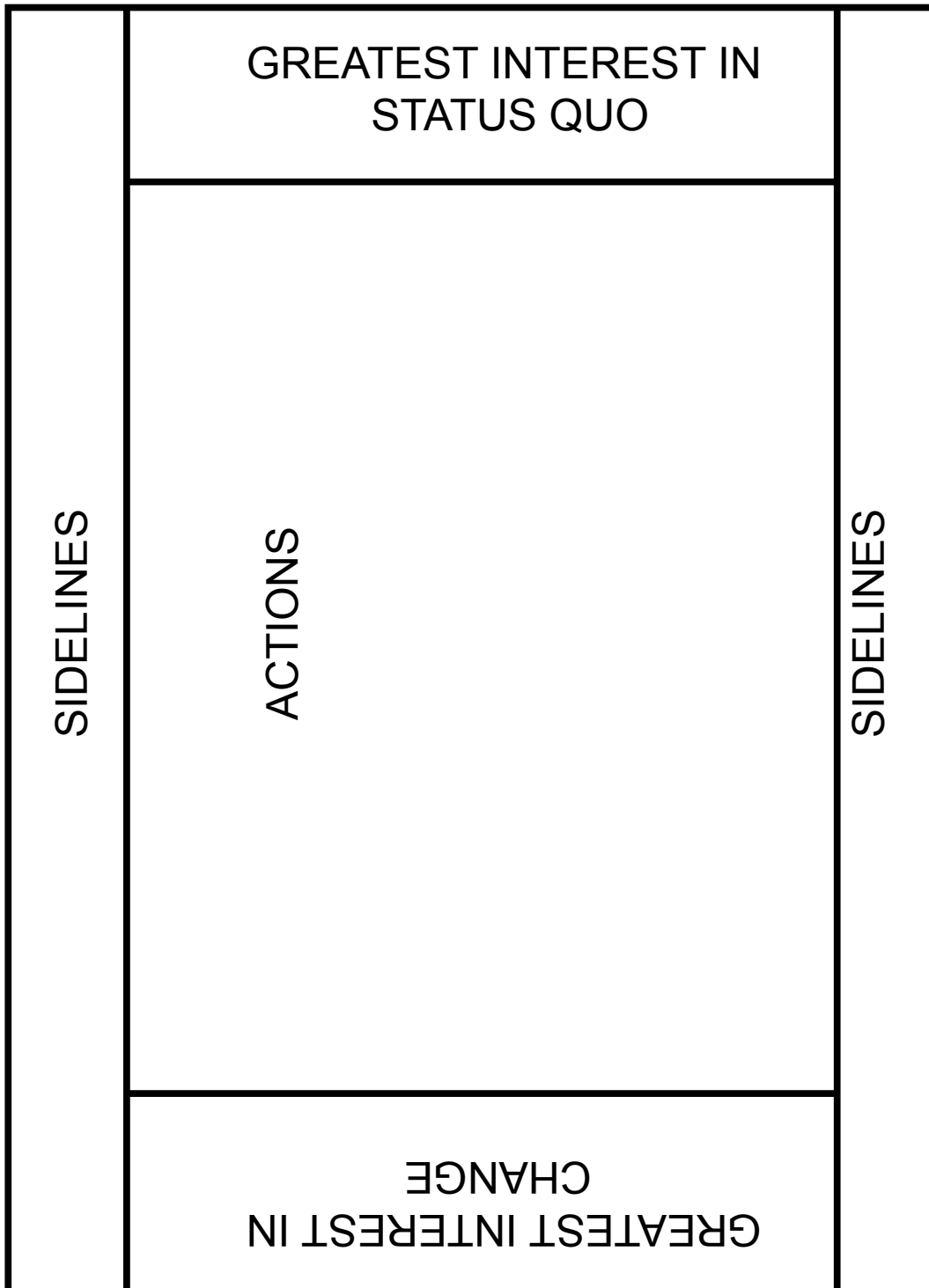
Remember: don't get stuck addressing every actor; instead, try to focus on a few that are the most influential.

## Map the Actors





## Field of Play



**ORGANIZING:  
PEOPLE, POWER, CHANGE**

