

ADVOCACY WORKBOOK

CCMW has partnered with the Institute for Change Leaders to offer FREE advocacy training sessions to CCMW Chapter members, volunteers, Board members and staff. The training sessions will provide an opportunity to learn about the different forms of advocacy that exist today and how we can set the advocacy wheels in motion. As part of the training, the Institute for Change Leaders has kindly shared this advocacy training manual with us to use as a tool to build skills for change.



Canadian Council of Muslim Women (CCMW)
Le conseil canadien des femmes musulmanes (CCFM)



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ABOUT THE CANADIAN COUNCIL OF MUSLIM WOMEN

The Canadian Council of Muslim Women (CCMW) is a charitable organization dedicated to the equality, equity and empowerment of all Muslim women in Canada. Our mission is to affirm the identities of Canadian Muslim women and promote their lived experiences through community engagement, public stakeholder engagement and amplified awareness of the social injustices that Muslim women and girls endure in Canada, while advocating for their diverse needs and equipping local CCMW chapters with necessary resources to maximize national efforts and mobilize local communities to joining the movement.

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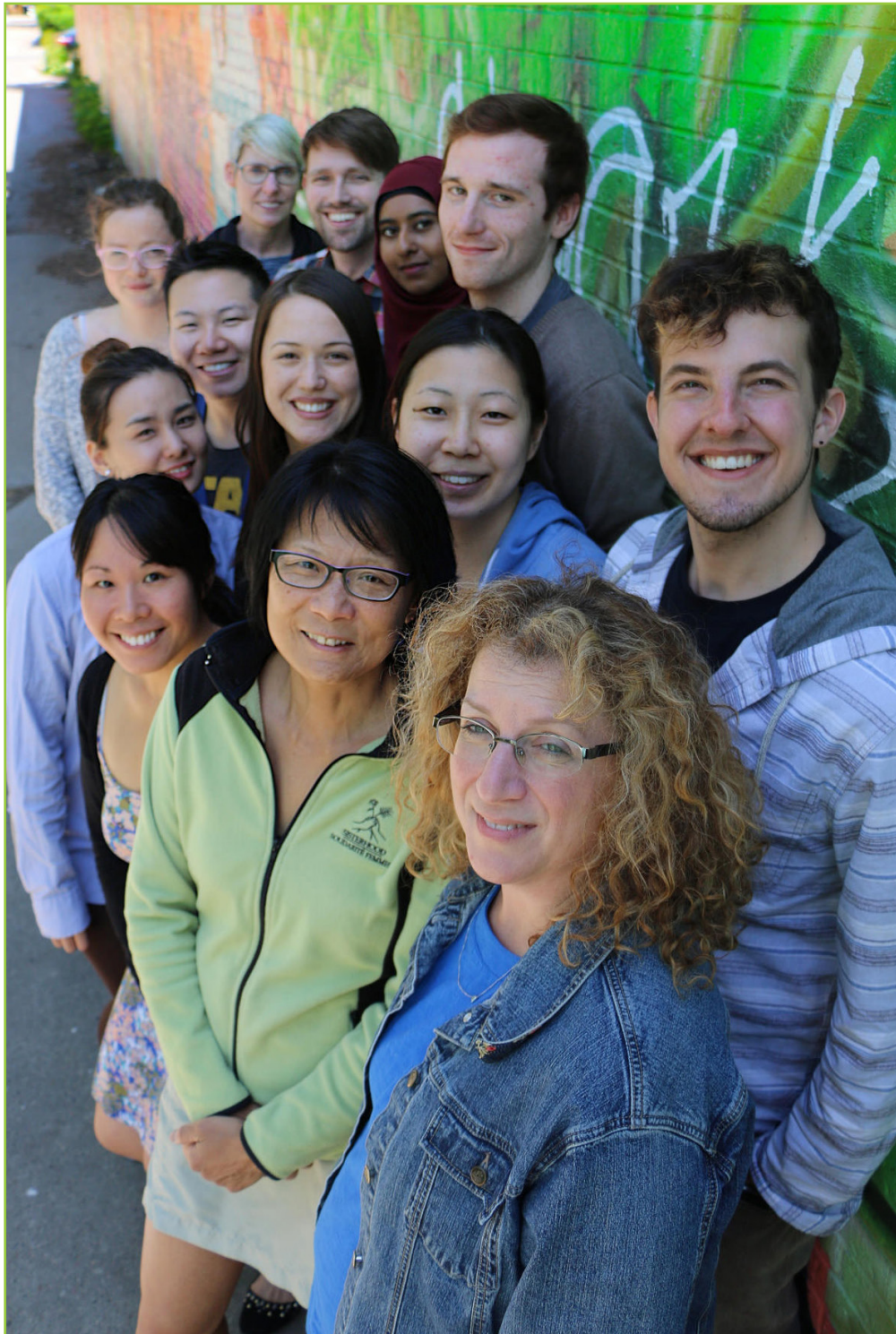
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Canadian Council of Muslim Women (CCMW)
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Building Skills for **CHANGE**

**Toronto
Metropolitan
University**

A Teaching Guide
by the Institute for
Change Leaders



Building Skills for **CHANGE**



Acknowledgements

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Further revised by the collective team of Project Organize, Institute for Change Leaders and Olivia Chow of **Toronto Metropolitan** University.

Project Organize is a team of community activists based in Toronto, Ontario, Canada. Project Organize members come from a diversity of abilities, sexual and gender identities, races, ethnicities, educational backgrounds, classes, and more. Project Organize endeavours to reflect the communities they want to empower. They work with the administrative support of the Institute for Change Leaders at **Toronto Metropolitan** University. The work of these volunteers is deeply appreciated.

All images, clip art, and designs are open source.

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Foreword

Hello and welcome!

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

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

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

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

"Leadership is taking responsibility or enabling others to identify the change they want and empowering them to achieve that change in the face of uncertainty" – Marshall Ganz

And here's what we mean by **organizing**:

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

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

- ñ telling stories
- ñ building relationships
- ñ structuring teams
- ñ strategizing
- ñ acting



FOREWORD



FOREWORD

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

Marshall Ganz, a Harvard professor, codified much of this curriculum over decades of work with communities seeking change. He developed the idea of "Public Narrative" (see the *Telling Stories* section) based on years of organizing and researching social movements. He cut his teeth as a young organizer in the Civil Rights Movement, worked with the United Farm Workers in the 1960s and '70s, and advised numerous unions, non-profits and political organizations for decades. He was also a key trainer and organizing strategist behind the Obama U.S. presidential campaigns of 2008 and 2012.

During Obama's campaign, millions of fellow organizers built on the best practices and techniques of community organizing. Ganz codified these practices based on past movements, and the training program he developed was critical to Obama's victory in the 2008 and 2012 elections. Many organizations, including the Leading Change Network and Organizing for America, grew out of these successful campaigns. Most of this guide has been adapted from the resources by Shea Sinnott and Peter Gibbs of Organize BC. We are very grateful for their generosity in allowing us to adapt Organize BC's guide, "Organizing: People, Power, Change."

In reading this guide, please keep two things in mind:

1. Organizing is practice. We learn to organize by organizing, not just by reading about it. This guide is meant to give you additional support and serve as a resource; the best way to learn this framework is to get out and do it. And don't let them tell you that it can't be done!
2. This organizing framework is just that – a framework, not a formula. We present some concepts and tools that many organizers have found to be effective and helpful in achieving positive change. Most of all, this content comes from practice, not theory.

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

Sincerely,



Olivia Chow
Distinguished Visiting Professor, Toronto Metropolitan University
Institute for Change Leaders
Curriculum Committee – Project Organize

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INTRODUCTION
TO ORGANIZING

1. Introduction to Organizing

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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

Key Concepts

- Organizing is leadership that allows us to join forces and turn our resources and interests into the power we need to make the change we want.
- Organizing has five key components: 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 building blocks of successful organizing.
- The snowflake model is an effective organizational structure that distributes power and responsibility to prioritize leadership development.



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INTRODUCTION TO ORGANIZING

Some activists are full of compassion with a long-lasting desire for social justice. Yet many people are wary of political organizing and getting involved in activism. To them we say: yes, power can corrupt, but power can also create change. Dare to gain power, build power, and make positive change.

The key lesson is not to be discouraged. This means not being discouraged by inevitable individual losses, and to see organizing as a long-term strategy to strengthen our community's capacity to change, but to be as organized as possible. If you don't get the answer you want the first, second, or even the third time, keep asking, keep organizing, and keep bringing people together. And don't expect anyone in power to make it easy or to give up any of their hold on power.

Begin by asking yourself:

- ñ Who are the people experiencing injustice?
- ñ Do they share your passion to change this injustice?
- ñ What is motivating you to get involved?
- ñ What is causing this problem and what needs to change?
- ñ What do you want to do about it?
- ñ What result do you want and by when?
- ñ Who can you recruit to help you?
- ñ Are there any existing groups out there pushing for the same change?
- ñ Who has the power to change the current circumstances?
- ñ What skills can you offer for the cause?

What is Organizing?

Organizing is leadership that enables us to join forces and turn the resources we have into the power we need to make the change we want. You'll learn from this guide that 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 create change is based on perfecting five key leadership practices: telling stories, building relationships, structuring teams, strategizing, and acting. We must master these practices to become effective community organizers.

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The Five Leadership Practices

1. How to tell the **story** of why you are organizing for change, the story of the community you hope to bring together, and the story of why we must act right now.
2. How to build **relationships** in a way that retains volunteers and develops their leadership
3. How to **structure** relationships to distribute power and responsibility, while building new leaders.
4. How to **strategize** with your people to turn your collective resources into the power you need to achieve clear goals.
5. How to turn your strategy into measurable, motivational, and effective **actions**.





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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 using that power to create change.

People

The first question an organizer should ask 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’s about empowering a group of people with common values and problems to mobilize their resources into action to solve their problems.



An organizer should never do for people what they can do for themselves. Instead, the job of an organizer is to empower others to be agents of change themselves.

– McKenna E., Han H.

Identifying a community of people is only the first step. The job of a community organizer is to transform a **community** – a group of people with shared values or interests – into a **constituency** – a community of people working together with a common purpose – to make change. The difference between community and constituency is the **commitment** to work together to reach shared goals.

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

Keep track of any and all contacts you make – on paper, in Excel, or with a community organizing system (e.g. NationBuilder). Every person we come into contact with is a potential lead – and leads can become organizers.

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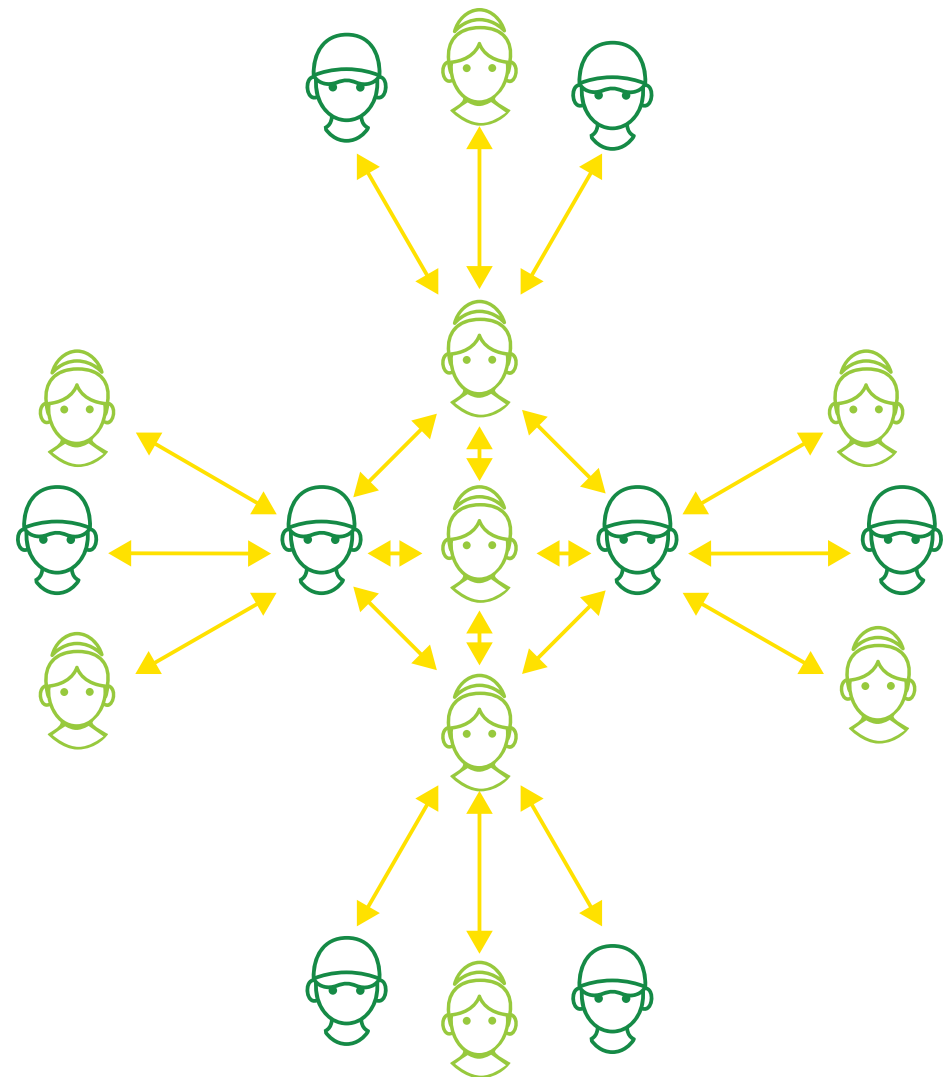
The Snowflake Model: A Distributed Approach to Leadership

One approach to structuring how you transform a community into a constituency is called the 'snowflake model'.

In the snowflake model, **leadership is distributed.**

No one person or group holds all the power; responsibility is shared in a sustainable way, and the structure creates mutual accountability and responsibility. The snowflake is made up of interconnected teams working together to reach common goals.

Second, the snowflake model is based on empowering others. A movement's strength is its ability to **develop new leaders**; in this model, everyone is responsible for finding, recruiting, and developing leaders. Leaders develop other leaders who, in turn, develop other leaders, and so on.



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

Think about the organizational structures you've been part of at work, school, or other areas of your life. Where did you fit into those structures, how did you feel in your role?

How does the snowflake model compare to structures you've been part of in the past?

As you'll see in the Structuring Teams section, the snowflake model is different from most organizing or leadership structures because responsibility is shared and the priority is to develop new leaders.

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Power

Organizing is about power: who has it, who doesn't, and how to build enough of it to shift power relationships and bring about change. Reverend Martin Luther King described power as "the ability to achieve purpose" and "the strength required to bring about social, political, and economic change."

Organizers see power as the influence created by the relationship between **interests** and **resources**. Here, **interests are what people need or want** (e.g., to protect a river, to stay in public office, to make money), while **resources are what people have** (e.g., people, energy, knowledge, relationships, creativity, and money) that they can use to achieve their goals.

We must combine interests and resources in new ways to create the power we need to bring about change. Collaboration brings interests and resources together. Transformative effects happen when people develop deep, trusting relationships with each other and share the benefits of each other's talents.

The constituency against water privatization may ask questions aimed at 'tracking down the power' – that is, investigating the relationship between actors, particularly the interests and resources of the actors in their struggle. For instance, they might ask questions like:

- ñ What are our interests?
- ñ What do we want?
- ñ Who has the resources to enable us to get what we want?
- ñ What are their interests?
- ñ What do they want?
- ñ What resources do we have that they need?

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

Change

In organizing, change must be specific, concrete, and significant. Organizing is not about 'raising awareness' or speech making (though they may contribute to an organizing effort). Organizing is about having a clear goal and mobilizing your resources to achieve it. Identifying your big "**mountaintop goal**" is important. But to get there you must start with **smaller, incremental**

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(nested) goals. This is challenging. It can be difficult to figure out what you can do, what you have to work towards, and what is just not reasonable or realistic at this moment. This is where strategy comes in – how you plan to use your resources to make change while continually building and developing those resources.

Your strategy will be continually **changing, evolving, and being re-evaluated.** This is central to being effective. The world and your context will change in ways you did not expect. To be relevant and effective, you have to stay on top of current events beyond your own interests and be prepared to respond to them quickly if necessary.

In the case of the proposed water privatization project noted above, the constituency against the sell-off must create clear, measurable goals. Note the difference between “our goal is to keep our water public” and “our goal is to put pressure on our town council in the next 3.5 months – through



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door-knocking, events, local newspaper op-eds aimed at getting 1/2 of town residents to sign our petition and 1/5 of residents to meet with their councillors – to pass a motion to keep our water in public hands.”

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

Want to read more about community organizing? Find the complete works that inform this text at changeleaders.ca/references.

Organizing Sentence

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

An “organizing sentence” is a tool to clearly state the main components of your strategy and organizing plan. Every team in a campaign – including the core leadership team and each local leadership team – should write their own unique organizing sentence.

As we’ll learn throughout this guide, community organizing is about people, power, and change – it starts with people and relationships, is focused on shifting power, and aims to create lasting change.

We are organizing (Who) to (What Outcome) through (How) by (When).

Or, put another way:

We are organizing (our people) to (strategic goal) through (tactics) by (timeline).

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

We, as a core team of five people, are organizing 350 tenants in our public housing building to identify everything that is broken and asking that they be fixed, through door-to-door and phone canvassing, meeting other buildings’ residents, forming a tenants’ association, staging rallies and pressuring local elected representatives by Sept. 13, 2019.



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TELLING
STORIES:
PUBLIC
NARRATIVE

2. Telling Stories – Public Narrative

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If I am not for myself, who will be for me? If I am only for myself, what am I? And if not now, when?

– Hillel (Pirkei Avot Chapter 1:14)

Key Concepts

- ñ We tell stories in organizing to share our **values** and use emotion to motivate people to **act**.
- ñ A story's **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 an **outcome**.
- ñ **The Public Narrative** framework includes a Story of Self, a Story of Us, and a Story of Now.
- ñ Learning to craft and re-craft your Public Narrative is a leadership practice.

Storytelling in Organizing

We use storytelling in organizing to answer the “why” questions: why we care, why the work we do matters, and why we value one goal over another.

To motivate people to work for change, we must be able to express our core values. We must dig deep and ask ourselves: at which point in our lives did we face a challenge and make a choice that shaped our values?

We must learn how to explain who we are and why we’re passionate about making a difference. Listing facts and rattling off statistics won’t recruit others to fight injustice. You need to win over hearts, not just minds.

Storytelling allows us to identify and communicate our shared values in a way that spurs us to take action together. In organizing, stories can be used as a source of inspiration, a means to engage and

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TELLING STORIES: PUBLIC NARRATIVE

build relationships with one another, and most importantly, a way to provide hope so others feel their participation can make a difference.

We all have stories of challenge and hope, or we wouldn't think the world needed changing (not that we could change it). The key is to craft a story that identifies our shared values and the current threat to those values, followed by an urgent call for a united response – that together we have the strength and courage to take action, even when faced with seemingly insurmountable barriers.

Remember that storytelling is not the same as 'speech-making.' We use it in many different contexts, not just from a stage at a rally. We use it the most when talking with friends – we share, we are open, and we listen. For example, we can use stories when recruiting a new team member, or when debriefing with a volunteer who had a hard shift.

An organizer could ask a new team member: 'Why did you choose to get involved in this campaign?' or 'Tell me about a time in your life that inspired you to come here today.' In turn, the organizer might share a bit of their story to find a connection, and hopefully, motivate the volunteer to take further action on the campaign.

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

In this section, we'll discuss the importance of emotion in storytelling, story structure, and a storytelling framework called "Public Narrative."

Emotions

The key to motivation is understanding that values **inspire action through emotion**. Stories should convey emotion and help others understand and connect to you. They need to be **true** stories about **real** experiences that share **genuine** emotions.

Since storytelling in organizing is used to motivate people to act, leaders must learn to **evoke emotion and stories so the audience feels their own actions will make a difference**.

The best storytellers adapt their stories to different audiences. They tap into emotions each particular audience can relate to in order to motivate them to act.

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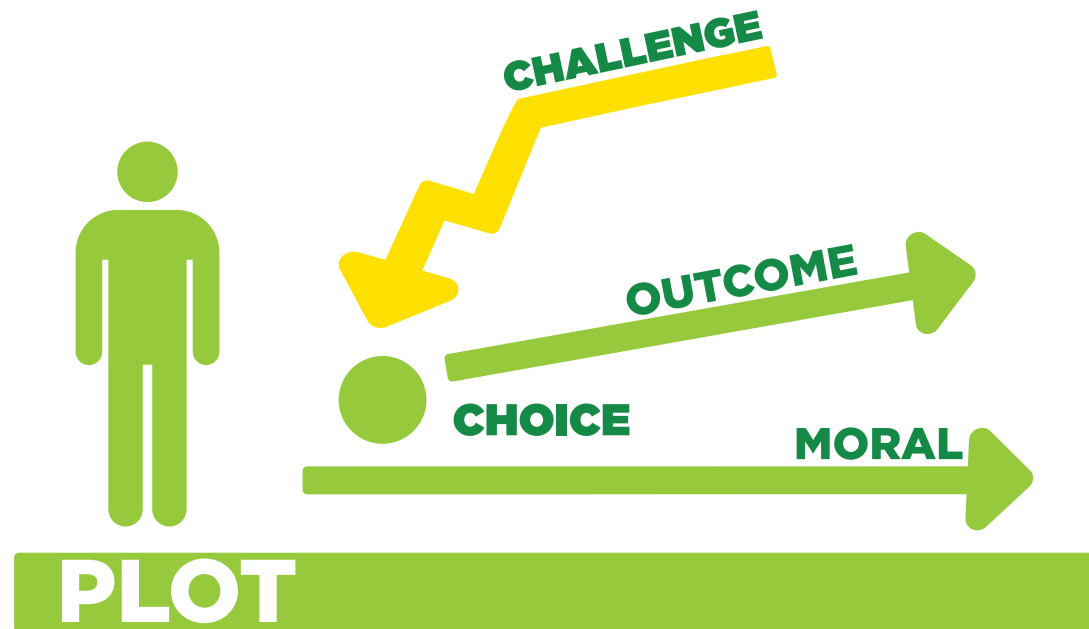
Structure: Challenge, Choice, Outcome

If you think about the stories you remember most vividly, you'll notice they have similar structural elements. Most stories consist of just three things: plot, character, and moral. But what makes a story a story, rather than a retelling of an event?

A story begins with a character confronted with a challenge, the challenge demands a choice, the choice leads to an outcome. Listeners are drawn in by tension and uncertainty, and become invested in the story's outcome. Challenge, choice, and outcome are the structural elements that bring a story to life.

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Challenge: Does the story have a challenge? What was it? What made it so challenging?

Choice: What choice is made in the story? Did it inspire courage or hope? How did the storyteller feel?

Outcome: How did the outcome feel? Why did it feel that way? What did it teach you? What lesson does it teach? How does it make others feel?

Stories are about people. Good stories make us empathize with the character and reflect on the moral. When we hear about someone's courage, we are also inspired by it. The story of the character's choice encourages listeners to think about their own values and challenges, and inspires new ways of thinking about how to make choices in their own lives. The goal is to motivate listeners through a 'lesson of the heart' and not a 'lesson of the head'.

Public Narrative

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

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Through public narrative, social movement leaders – and participants – can move to action by mobilizing sources of motivation, constructing new shared individual and collective identities, and finding the courage to act.

The Public Narrative framework has three parts: **Story of Self, Story of Us, and Story of Now.** The Story of Self communicates the values that have called you to leadership; the Story of Us communicates the values shared by those in action; the Story of Now communicates an urgent challenge to those values that demands immediate action.

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 how to craft a narrative that bridges the self, us, and now, organizers build trust and solidarity with their constituency. But organizers don’t just tell their stories, they also help new members craft persuasive stories of their own.

Storytelling can be strategic – the most moving stories are those of the people most affected by the issue in question. These groups are called ‘frontline communities.’ For example, if you are organizing to have your municipal government fund affordable housing, the communities with the most moving stories are those who don’t have housing, or those living in subsidized housing in advanced disrepair. Building relationships with these communities empowers those who would benefit most from organizing, and gives the organizer access to powerful stories that recruit volunteers and persuade decision-makers.



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Story of Self

Telling your Story of Self shows who you are, the choices that have shaped your identity, the lessons you have learned from those choices, and the values that guide you. Learning to tell a compelling Story of Self requires looking deep within yourself and finding the courage to share what you discover.

We build our stories of self around “choice moments” – moments in life when our values were challenged and moved us to act, what outcome we experienced, and the lesson we learned from it.

Ask yourself:

- ñ When did I first experience injustice?
- ñ Why does this matter so much to me?
- ñ When did I feel I had to act?
- ñ What did I do?
- ñ How did I feel about this?





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TELLING STORIES: PUBLIC NARRATIVE

A Story of Self is not a biography or a list of all the challenges you've faced. Every person has many stories to tell. The key to a strong story of self is to select "choice points" that are meaningful to your audience.

Once you make your choice, dig deeper and ask yourself: what was the result of this choice and how did it make me feel? What did I learn?

Sharing our stories matters. People from marginalized backgrounds often feel ashamed of their stories and afraid to tell them, or they let "professionals" tell their stories and thus lose the power of their voices. When we step up to represent our community in a position of leadership, we have a responsibility to let others know where we come from, why we do what we do, and what we are asking of them in order to make the change we need.

Our stories give us the chance to connect with each other; and they are opportunities for you to find others like you. By telling our stories we challenge the powers-that-be who try to tell our stories for us.

While developing your Story of Self, think about these questions:

- ñ What is calling me to leadership?
- ñ Why do I want to tackle this specific injustice or problem and work on this organizing effort?
- ñ What values move me to act?
- ñ Have these values always been important to me? If not, when did that change?
- ñ How might these values inspire others to similar action?
- ñ What stories can I tell about specific people or events in my life that would show, rather than tell, how I learned or acted on those values?

Story of Us

Your Story of Us expresses the values and experience of the 'us' your audience shares. This means your 'us' can and will change depending on whom you're speaking to. The goal is to create a sense of unity, togetherness, and focus on the shared values of your listeners.

Similar to your Story of Self, your Story of Us focuses on chosen points, but this time, the character isn't you, it's the **community you are motivating to act**, and the choices are those the community has faced. The key is to focus on telling a specific story, about specific people, at a specific time, that

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addresses the values you share. Telling a good Story of Us requires compassion and empathy – to consider the experience of others deeply enough to take a chance at articulating that experience.

A compelling Story of Us doesn't just highlight challenges, it includes stories of success to give people hope. As Ganz writes, "Hope is one of the most precious gifts we can give each other and the people we work with to make change."

In developing your Story of Us, consider these questions:

- ñ What values do you share with this community?
- ñ What challenges has the community faced?
- ñ What experiences have had the greatest impact on this community?
- ñ What change does this community hope for and why?

2

TELLING
STORIES:
PUBLIC
NARRATIVE

Story of Now

By telling your **Story of Now**, you communicate the **urgent challenge** your community faces, and the threat to your shared values that demands immediate action. It should include moments and experiences that bring the urgency of the challenge alive; for instance, an upcoming moment of opportunity that may not happen again.

The Story of Now also offers real, credible hope. It could touch on what other people are already achieving, the courageous actions of others, or a vision of what you can achieve together.

At the crossroads of the urgency and promise of hope is a choice to make – to act or not to act.

Your Story of Now should paint a picture of what the future looks like if we don't act now (the 'nightmare') and what the future could be if we act together (the 'dream').



2

TELLING
STORIES:
PUBLIC
NARRATIVE

Lastly, your Story of Now should end with a “hard ask” (see the Building Relationships section for what this is). You want to motivate your listeners to take action and give them a specific, concrete way to do it.

Ask yourself these questions while working on your Story of Now:

- ñ Why now? Is something happening in the larger world that makes this important right now?
- ñ What are the risks if we don't act?
- ñ What are the benefits if we do act?
- ñ What are the actions we could take?

Story of Self, Us, and Now: Weaving Them All Together

When woven together, your Public Narrative should: describe the shared values that call you to your mission, the challenges to those values that require urgent action, a plan for solving those challenges, and an invitation to your listeners to join you in taking action.

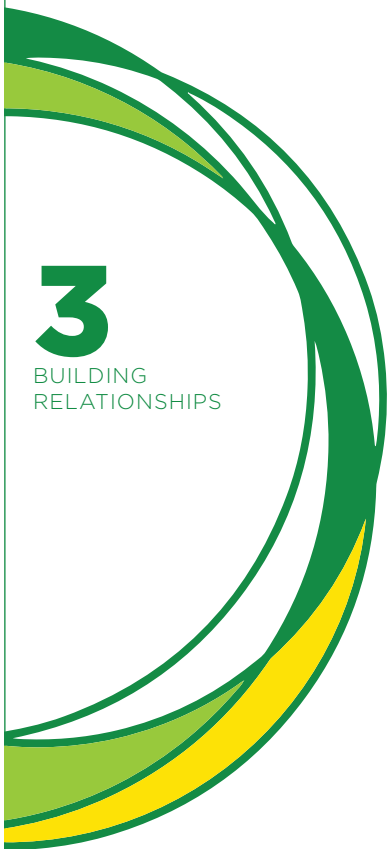
In closing, remember that storytelling in organizing is a way to connect, inspire, and motivate people to join forces to create change.

As you listen to the Public Narratives of others, ask yourself the following questions:

- ñ What values did the speaker's story convey?
- ñ What details showed those values?
- ñ What was the challenge, choice, and outcome in each part of their story?
- ñ What did the character in the story learn from those outcomes?
- ñ What was the speaker asking people to do?

For more help with developing your Public Narrative, see Worksheets II-VIII.





3. Building Relationships



Organizing is a fancy word for relationship-building.

– Mary Beth Rogers

Key Concepts

- ñ **The 1:1 (one-on-one) meeting** is a key tool for starting and maintaining relationships.
- ñ There are three types of 1:1 meetings:
 1. Recruitment one-on-ones
 2. Maintenance one-on-ones
 3. Escalation one-on-ones
- ñ **Testing** is the process by which, through completion of tasks and actions, you determine whether a person can successfully take on more work and responsibility.
- ñ **The Ladder of Engagement** is an escalation tool whereby, through successful testing, you move volunteers from a position of just participating towards one of leadership.
- ñ **Mobilizing** is the process of getting volunteers to complete specific tasks assigned by a leader.
- ñ A **“hard ask”** is a way to ask for a commitment to completing a task.

3

BUILDING
RELATIONSHIPS

Why Build Relationships?

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 a common purpose. **Commitment** is developed by building relationships.

Mobilizing is how most volunteer coordinators and leaders get things done. They come up with tasks that need doing and find volunteers to complete them. This gets the work done, but it doesn't lead to the transformative work we're teaching in this workshop. Organizing differs from mobilizing because it involves **assigning tasks to complete while also developing the skill set of the person doing them**. It's an opportunity to empower people and include them in the process of changemaking.

"Lone wolf" leaders demonstrate the problems that arise when building relationships isn't important. In this scenario, there is one leader doing everything (or mostly everything) all by themselves. They think they are the only person who can do the task at hand and are unwilling to train and develop others.

This situation often leads to burnout. And usually, when the "lone wolf" burns out, the work they are doing comes to a crashing halt. We want to avoid this process as much as possible.

Avoid the lone wolf scenario by building relationships with your recruits and mentoring them to become future leaders. If you continually develop the leadership skills of your team members, if one goes down, the others are strong enough to support the group and keep it moving towards your goal.

Not all relationships will be long-term. It's natural for some leaders to move away while others come forward. The process is dynamic and constantly changing. Be realistic about how much time you have to develop relationships. Quality matters over quantity in deep relationship building.

We cannot overemphasize the importance of relationships in creating change. You must put time and energy into your relationships and into planning how to strengthen them. Your relationships will determine your success or failure as a changemaker.

Building Intentional Relationships

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

While not all relationships are long-term; they are never short-lived. We're not simply looking for



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BUILDING RELATIONSHIPS

someone to complete a task that needs doing. We're looking for people to join and grow with us over time.

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 all grow and change, the purpose that led us to form the relationship may change as well; this can deepen and enrich relationships, and the relationship itself becomes a valued resource.

Relationships involve attention and work. When nurtured over time, relationships should motivate, inspire and become an important source of learning and development for the individuals and communities that make up your organizing campaigns. Be aware of how much time you can devote to building intentional relationships.

The 1:1 Meeting

The 1:1 (one-on-one) meeting is a tool to start, maintain, and grow relationships in organizing. These are intentional conversations. Each 1:1 meeting has four key pieces:

- 1. Purpose** – Be up front from the start about why you're meeting so you're both on the same page. This way, no one will be caught off guard at the end of your meeting. If you plan to ask the person to make a commitment at the end of your 1:1, it's ok to state this when you set up the meeting, and remind them at the beginning of your meeting.
- 2. Exploration** – Most of the 1:1 should involve exploration through probing questions. If you're meeting a person for the first time, ask questions that help you understand their story and values, and learn what knowledge and skills (resources) they have that could contribute to your shared purpose. If you already have a relationship, ask questions that will help you understand what's going on in their life, or about the challenges and successes they are experiencing in their organizing. And most importantly, listen.
- 3. Exchange** – You exchange resources in the meeting such as information, support, and insight; you may connect your stories or provide coaching on a challenging point. This builds a foundation for future exchanges.
- 4. Commitment** – A successful 1:1 meeting ends with a commitment to start working together, or an agreement to continue working together.

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BUILDING
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Three Types of 1:1 Meetings

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

1. Recruitment 1:1 (adding new organizers)

1:1 meetings happen at the start of a relationship to connect you and a new organizer and begin a connection based on shared goals and values. The point of a 1:1 meeting is to find connections using your personal story. Identify possibilities and interests and probe for shared experiences. Lastly, try to move the volunteer to action based on what you've discussed. Think about the volunteer's ability, skills, and connections when considering how to best engage with them.

2. Maintenance 1:1 (support)

1:1 meetings should occur regularly between you and each of your organizers (assuming you're in a leadership role in your team or snowflake). This is an opportunity to catch up on a personal level, debrief recent actions taken by the organizer and their team, and offer coaching (see the Coaching section for more information on how to approach coaching). Maintenance 1:1s should be scheduled regularly: don't wait for a problem to occur to schedule one. A good guideline is to schedule a maintenance 1:1 every two weeks.

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.**"

Try to make maintenance 1:1s face-to-face whenever possible. That said, if you're organizing a remote community, or very short on time, phone and/or Skype 1:1s are still valuable. The key point is that organizers must set aside time to build relationships where they coach and provide leadership development, as best they can in whatever situation they are in.

3. Escalation 1:1

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

In an escalation 1:1, name the skills the organizer already has, and actions the organizer has already taken, then suggest the idea of taking on this new leadership role. If all goes as planned and the

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BUILDING RELATIONSHIPS

organizer accepts, take the time to clearly lay out the responsibilities and expectations for this new role. The opposite of an escalation 1:1 is that you may need to de-escalate a person from a leadership position or action. There can be any number of reasons why this may happen. However, **effective use of maintenance 1:1s and testing will help avoid sticky situations.**

Hard Asks

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



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BUILDING
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Here are some best practices for a hard ask:

●ñ Ask in **brief, plain, and specific language.**

- Example of an effective hard ask: “Can you come to our team meeting next Wednesday at 6 p.m. 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?”

●ñ **Never apologize for asking:** organizing is an opportunity, not a favour. Sometimes we feel bad for asking someone to take action because we feel it’s an inconvenience, when really, **we’re offering the person a unique opportunity to participate and become a leader.**

●ñ Have a back-up hard ask prepared in case they say no.

●ñ Don’t ask them to commit to something general; **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.

●ñ **Express urgency:** describe an urgent problem, and how the person you are asking is the solution to the problem.

Three Types of No

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

NOT NOW

When someone says “I’m too busy next week to help out” it’s an invitation to offer another time for them to get involved. For example:

“We’ve got a rally next Tuesday at 2 p.m. in front of the library. I can sign you up right now.”

“I’ve got class from 2 p.m. to 4 p.m.”

“Ok, we could definitely use help setting up the banners and staffing the tables before the rally starts, between 12 and 2 p.m. Can you come and help?”



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BUILDING RELATIONSHIPS

NOT THAT

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

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

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

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

NOT EVER

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

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

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

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

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

Sample Recruitment/Adding on 1:1 Agenda

Here’s a sample 1:1 meeting agenda. Remember this is just a framework, not an exact itinerary you must follow.

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

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

Start by asking questions like:



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BUILDING RELATIONSHIPS

- ñ “Why is this issue important enough for you to act?”
- ñ “Can you remember the first time you stood up for something you believed in?”
- ñ “Did you always feel strongly about this issue? Why/why not and what changed that?”

Once you have a grasp on their story and motivations, share yours. Whenever you find similarities between their story and yours, make a connection.

In this part of the 1:1, you’re trying to get them to share their Story of Self, and then share your story, to begin a Story of Us.

Best Practices for a 1:1

DO

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

DON'T

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

Recruitment and Retention Best Practices

3

BUILDING RELATIONSHIPS

These 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 a 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're coming back.
- **Confirm a commitment:** use a hard ask, and make sure the person understands you are counting on them. Don't assume their involvement before they confirm it.
- **Plan for no-shows:** assume that only half of your people will turn up. For example, if you



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BUILDING
RELATIONSHIPS

need four people for a successful event, plan on scheduling eight.

●ñ **Design actions well:** actions should empower those who participate.ñ

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

- ñ They don't feel it's worth their time
- ñ The atmosphere is disorganized and they don't feel they're receiving attention or direction
- ñ No one explained to them why the work they're doing is important
- ñ They are uncomfortable doing what they've been asked to do
- ñ They feel overwhelmed by the tasks and goals



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BUILDING RELATIONSHIPS

- ñ The volunteer environment is unwelcoming

- ñ No one recognizes their contribution

- ñ No one asked them

To summarize: building strong relationships is critical for effective community organizing. Our power stems from our commitment to one another, and to taking action together. The hard ask, the 1:1 meeting, and best practices for recruitment and retention are key ways we can secure commitment in our work.





4. Coaching: Enabling Others

4

COACHING:
ENABLING
OTHERS

Key Concepts

- ñ Coaching is a key part of **leadership development**; the goal of coaching is to help people solve problems on their own. The role of the coach is to ask questions that lead the coachee to uncover the answers themselves.
- ñ Coaching can be thought of as a **five-step process**:
 1. Ask and observe
 2. Diagnose
 3. Intervene
 4. Act
 5. Check in
- ñ Developing a culture of coaching is key to building effective teams.

What is Coaching?

Coaching is essential for you to enable new leaders to transform their resources into change. In trying to create change, you will encounter challenges you did not foresee and conflicts you do not want. Coaching is how you prepare the people you organize with to work through these challenges.

The role of the coach is to **help people find their own solutions**; rather than offering advice, coaches ask questions that lead people to find the answers themselves, and to use their own resources to meet challenges. The purpose of coaching is to help people build their own ability to act, so they can coach others, and so on.

In organizing, coaching usually takes the form of a conversation with an individual or team that helps them improve their own effectiveness. As discussed in the previous section, the maintenance 1:1 is the best way to coach an organizer.

Effective Coaching

Coaching is...

- ñ Being present and listening
- ñ Providing a space for your coachee to speak and be heard
- ñ Asking questions that both support and challenge the coachee
- ñ Helping the coachee explore their challenges and successes
- ñ Assisting the coachee in finding solutions to problems themselves

Coaching is not...

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

Coaching: A Five-Step Process

The following five steps provide a simple framework for effective coaching in organizing.

1. Ask & Observe

When someone comes to you for help, start by listening, asking questions, and closely observing what they say and do so you can dig deeper.

For example, is the coachee failing to plan or evaluate tactics that meet shared goals? Is the coachee expressing fatigue or frustration with canvassing? Is the coachee struggling to complete routine tasks correctly or on time?



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COACHING:
ENABLING
OTHERS

4

COACHING: ENABLING OTHERS

Remember, **challenges aren't always obvious**; sometimes, the bulk of the coach's work is to simply support the coachee in discovering the nature of the obstacle they're facing. One skill to help both coach and coachee uncover the challenge(s) is called "backtracking." Here are some sample backtracking statements and questions:

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



2. Diagnose

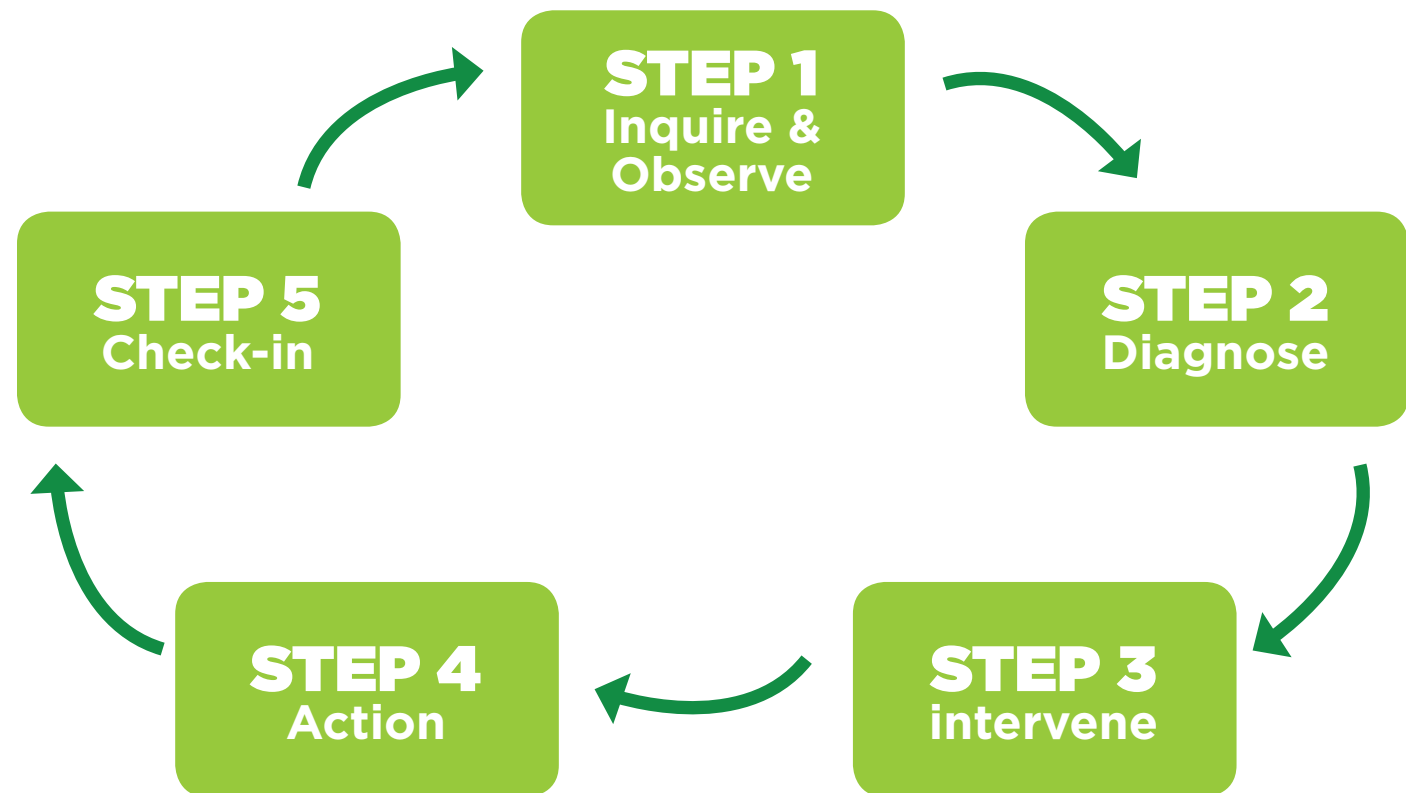
Challenges in organizing usually fall into one or more of the following three categories: strategy, motivation, and skills challenge – or “head, heart, hands.” How you coach depends on the nature of the challenge. Ask yourself: what is the nature of this challenge, and how should I intervene?

In the examples above, if the coachee is failing to plan or evaluate tactics that meet shared goals, you might focus on the coachee’s understanding of strategy (head) and invite them to a planning meeting. On the other hand, if the coachee is expressing feelings of frustration or fatigue with 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 instruction or practice to make sure they have mastery over their responsibilities.



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COACHING:
ENABLING
OTHERS





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COACHING:
ENABLING
OTHERS

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 articulated in Step 2. Here are some sample questions you could ask the coachee in order to come up with next steps:

- ñ "If you knew you wouldn't fail, what would you do?"
- ñ "How will you put this new idea into practice?"
- ñ "What is the very next step, moving forward?"
- ñ "What resources and support do you need to complete this task?"
- ñ "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. **Avoid the urge to do it for them.** ñ

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 reflect on their experience?

Assess whether the diagnosis of the challenge and intervention (i.e., the coachee's plan) was 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!

By establishing a culture of coaching, organizers help find solutions to each other's problems – this is fundamental to leadership development in organizing.



5. Structuring Teams

Key Concepts

- Teams are critical to organizing, in part because we develop relationships with our teammates that support and strengthen our commitment to taking action.
- **Effective teams** need a shared purpose, interdependent roles, and the creation and enforcement of norms.
- The **snowflake model** features:
 1. Mutual accountability and commitment
 2. Sustainable number of relationships
 3. Clearly defined roles
 4. Capacity for growth
- The **stages of team development** refer to creation, enhancement, growth, and development of your team in five general phases:
 1. Potential
 2. Team formation
 3. Team
 4. Developed team
 5. Team transformation

5

STRUCTURING
TEAMS

- The **ladder of engagement** can help us effectively and gradually guide a supporter into becoming a leader. Starting from the bottom:

Supporter



Volunteer Prospect



Team Member



Leadership Prospect



Organizer

5

STRUCTURING
TEAMS

Why Organize in Teams?

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

Secondly, through teamwork we can meet higher goals by tapping into the many different resources, skills, knowledge, and experiences that diverse groups bring.

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



5

STRUCTURING TEAMS

What Do Effective Teams Have in Common?

Effective teams usually have three things in common: a shared purpose, interdependent roles, and agreed upon and enforced norms.

A Shared Purpose

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

A powerful organizing purpose is a response to injustice. The first step in expressing shared purpose is to identify the people you are organizing. Your specific constituency is the community of people who are standing together to realize a common purpose. Shared purpose should also be measurable: your team needs clear goals in order to measure progress.

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

Interdependent Roles

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

Creating and Enforcing Norms

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

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

Most importantly, these norms must be respected and upheld by the group. They cannot just be a list of aspirations – they must be routinely reviewed, affirmed, and enforced by the group.

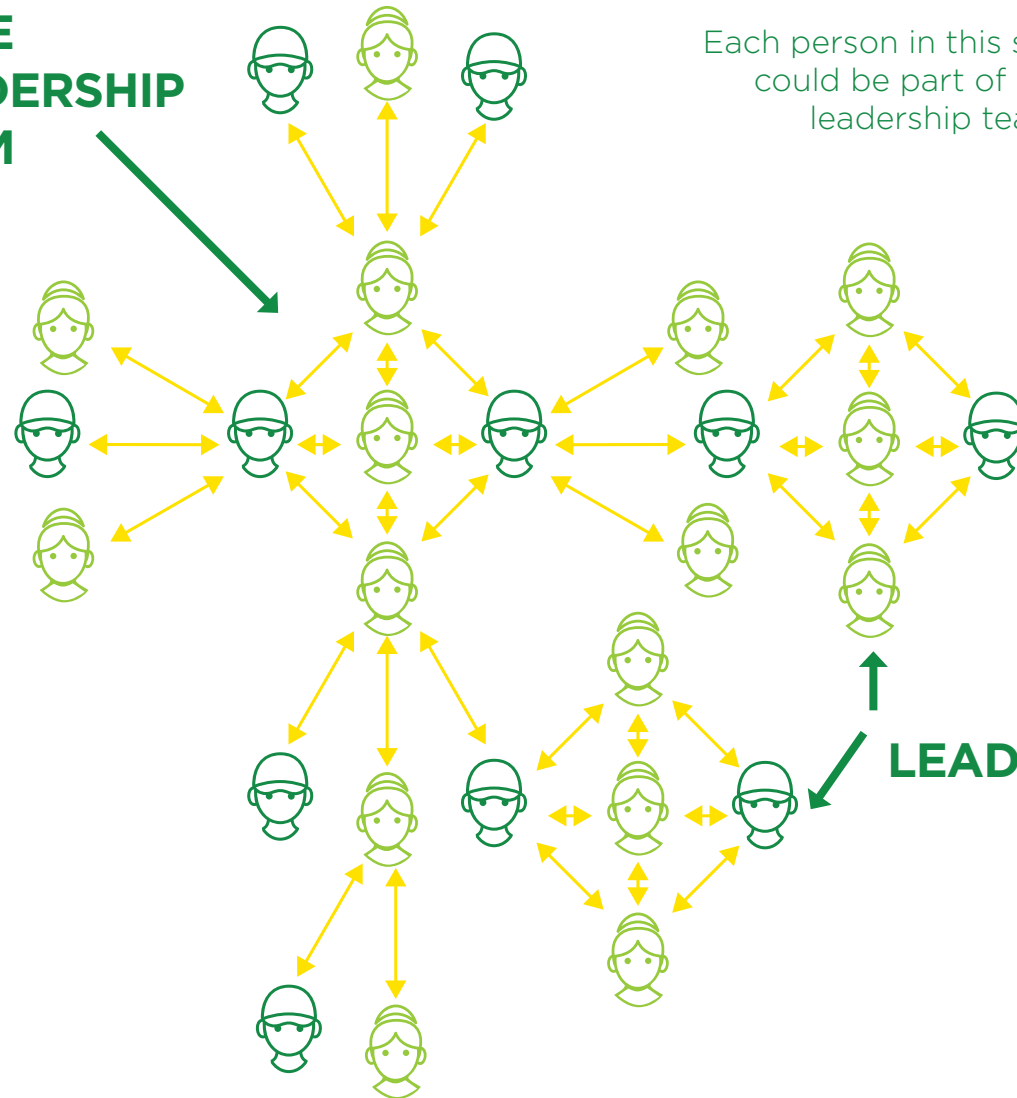
The Snowflake Model: Interconnected Teams

The snowflake model is defined by its distribution of leadership and by its commitment to leadership development. Relationships are the bonds that hold the snowflake together, and these relationships support the interconnected teams that make up the snowflake.

Each person in this snowflake could be part of a local leadership team

CORE LEADERSHIP TEAM

LOCAL LEADERSHIP TEAMS



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STRUCTURING
TEAMS



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STRUCTURING TEAMS

1. **Distributed leadership: core and local leadership teams**

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

2. **Sustainable relationships ratios**

In the snowflake model, each person has a sustainable number of relationships. While you are likely to interact with many people in your organizing work, it's important to focus on maintaining relationships with those on your team (one way to do this is through regular team/maintenance 1:1 meetings). As a general rule, if you are organizing full-time (i.e., committing over 40 hours/week), then you can maintain up to 10 relationships. If you are organizing part-time, as is the case for the majority of grassroots organizers, you can maintain up to five relationships. Be realistic about the amount of functional relationships you can have.

3. **Mutual accountability**

The snowflake model doesn't operate as a hierarchy with managers delegating tasks in a top-down fashion while expecting results. Instead, team members are accountable to each other, mutually agree on tasks, and expect results from and provide support to each other.

4. **Clearly defined roles and responsibilities**

Though the team is working towards a common goal, each team member has a specific role, with specific tasks, and clearly understands their responsibilities.

5. **Capacity for growth**

The snowflake model has the ability for continued growth. Teams take on new people who eventually break off and form their own teams, those teams add people who break off into new teams, and so on. Teams working in the snowflake model structure have ranged in size from two or three people running a local campaign to 20,000-80,000 working on a federal election.

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STRUCTURING
TEAMS

Team Stages

Teams go through different phases of growth and will naturally experience growing pains along the way.

Phase 1: Potential

The team is brand new. A few excited volunteers are eager to do more, but have limited or no involvement beyond a shared interest. An organizer's role is to develop this team to Phase 2 as soon as possible. The organizer must network and recruit within the community by scheduling 1:1 meetings, and organize events to attract potential new team members.

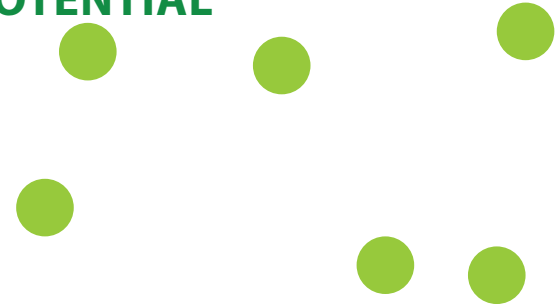
Phase 2: Team Formation

At this stage, the team has a local leader (e.g., a community organizer) but no other organizers. The team leader is recruiting team members and beginning to move them up the ladder of engagement. This phase is usually the longest. The establishment of norms and ground rules can begin.

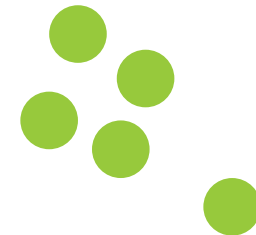
Phase 3: Team

The team has one team leader and at least one other organizer. The team is official and needs to grow to increase its potential. Events draw more attendees and the leaders test, escalate, and make hard asks to bring volunteers into the snowflake.

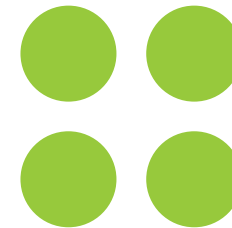
POTENTIAL



TEAM FORMATION



TEAM



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STRUCTURING TEAMS

The challenge for organizers in Phase 3 is to grow and strengthen the team, but not so quickly that existing members of the team are neglected. In this phase, time and resources should be put into maintaining your relationships with experienced, reliable organizers as they move up the ladder of engagement. In other words, don't get hung up on people who don't show up; focus on those that do.

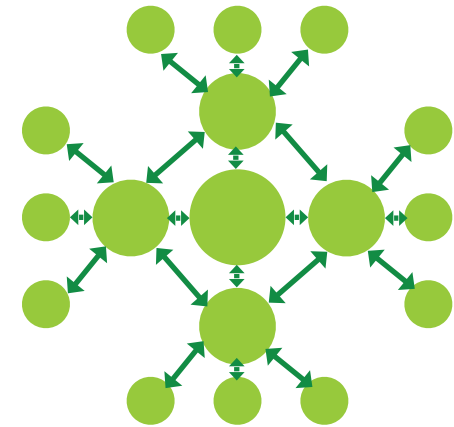
Phase 4: Developed Team

The team has at least four core organizers, including the team leader. If the team follows the ladder of engagement approach, it will grow into a bigger and more efficient snowflake over time.

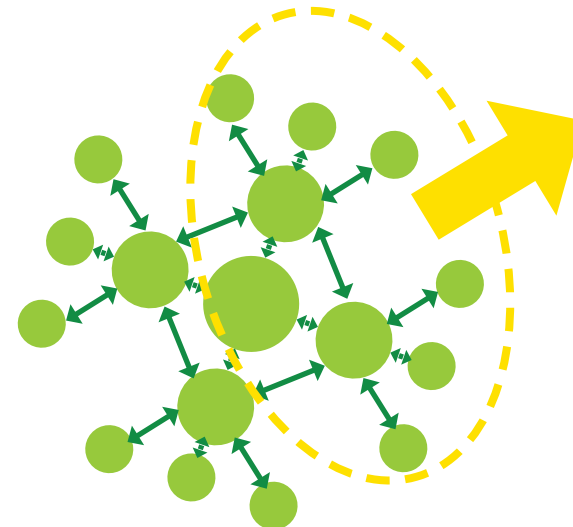
Phase 5: Team Transformation/Changes

The team has reached its full potential and is ready to multiply into more teams. Organizers may train existing team members to start new teams in other neighbourhoods or regions (known as "turfs"). Organizers should offer more support to team members during this process, as it can be a complicated and emotional time.

DEVELOPED TEAM



TEAM TRANSFORMATION/CHANGES



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STRUCTURING
TEAMS

The Ladder of Engagement: Recruiting Organizers

Turning an interested supporter into an organizer does not happen overnight. A supporter is recruited, and over time, tested, and escalated into roles requiring more and more commitment and skills. The recruit must show they have the ability to perform the duties of each position.

As an organizer, it's your role to identify and develop leadership in others. We call this process the ladder of engagement. Here's an example of the ladder of engagement (note that your ladder might look somewhat 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 an organizer's ask. Organizer invites them to come out to a volunteer event; ideally within 48 hours when prospects are more likely to say yes.
- 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.





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STRUCTURING TEAMS

- 4. Leadership Prospect:** Team member begins taking on leadership. Organizer schedules an escalation 1:1 meeting to ask team member to take on a leadership role.
- 5. Organizer:** A leadership prospect has proven their ability and commitment. They are able to organize and follow through on their commitments. As a result, an organizer may ask them to be a leader.

Note: Steps 1 and 2 can be repeated over and over to escalate the organizer into new roles as they take on more responsibility and become more committed.

Recruiting from Outside Your Social Circles

(This material is inspired from content at trainings.350.org)

It's common in organizing to reach out to and recruit people similar to ourselves. This is limiting, however, because we miss the opportunity to access entirely new networks and skills. Here are some tips on how to recruit people from different social circles:

- ñ **Show up at community events for other issues and communities.** You can learn different way to organize events, and discover values you have in common
- ñ **Experiment with new events and tactics.** If your only tactic is public deputations (one person speaking on behalf of a group), you may fail to recruit volunteers afraid of public speaking. If your only tactic is canvassing, you might not recruit more introverted people, or those self-conscious about their language skills. By using a range of tactics, you can recruit a diverse group of people who bring a wide variety of resources to your group.
- ñ **Book 1:1s with organizers from different movements.** Not only can you find ways to collaborate, but you can learn how different movements organize their people.
- ñ **Use big-tent messaging.** If your issue is very specific, people with related (but not identical) concerns might not see how they fit in. For example, if you want wheelchair accessibility at your local park, show community members interested in a generally accessible neighbourhood how the one change you want fits into their broader goals.
- ñ **Include positive events.** Though using negative messaging (Stop! No! Enough! etc.) can be effective, it can turn off passive allies who prefer to see a positive vision of the world. Positive events are things like Pride parades, take your bike to work days, food drives, etc.



6. Strategizing

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STRATEGIZING

Key Concepts

●ñ **Resources + Interests = Power**

●ñ **Strategy must be:**

1. Motivated
2. Intentional
3. Situated
4. Flexible
5. Goal-Oriented

●ñ **Strategizing in Five Steps:**

1. Identify Actors
2. Identify Activity
3. Make Clear Goals
4. Identify the Power
5. Theory of Change

- ñ A strategy has **big (mountaintop) goals** and **smaller (nested) goals**. Big goals are made up of smaller, measurable goals. A series of smaller goals lets us work towards our mountaintop goal without feeling intimidated or overwhelmed.
- ñ A **“Theory of Change”** statement is a summary of your strategy and a short blueprint for how your group plans to bring about change.

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STRATEGIZING

Strategy

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

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

Principles of Strategy

- ñ Strategy is **motivated**: It's a response to a pressing need/problem and a commitment to a solution/goal.
- ñ Strategy is **intentional**: It requires choosing tactics with purpose and significance.
- ñ Strategy is **situated** and developed within a complex ecosystem of supporters, opponents, and other actors. A successful strategy anticipates what other actors will do, and leverages the strengths and weaknesses of allies and opponents.
- ñ Strategy is **flexible** and must continuously respond to evaluation and shifts in the environment. Strategy requires monitoring, responsiveness, and action.
- ñ Strategy is **goal-oriented** (nested and mountaintop) and should always be crafted with these goals in mind. Each goal needs a different strategy.

How to Strategize

Step 1: Who are Your People?

Who are our people? When developing your strategy, there are five main groups to consider: constituency, leadership, supporters, competitors, and opposition.

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STRATEGIZING

- **Constituency:** People **actively** working on your campaign who share a specific interest and are committed to working together.
- **Leadership:** Organizers draw leadership from within their constituency. These leaders enable others to make change. They are responsible for and to their constituents.
- **Supporters:** People who share your values or interests but are not actively working on your campaign.
- **Competitors:** Those doing the same or similar work as you. They influence discussion and activity around your issue. For example, they may be trying to recruit the same people as volunteers.
- **Opposition:** Individuals and organizations in conflict with you and your interests.

Step 2: What is the Problem?

Once we have established who the actors are, we need to figure out the problem. A situation has brought us together so let's figure out what it is.

Analyze the problem by asking three questions:

1. What exactly is the problem we're trying to solve?
2. Why hasn't it been solved?
3. 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.

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 spend more time figuring out how to solve the problem?

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

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STRATEGIZING

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.

Step 3: Make Clear Goals

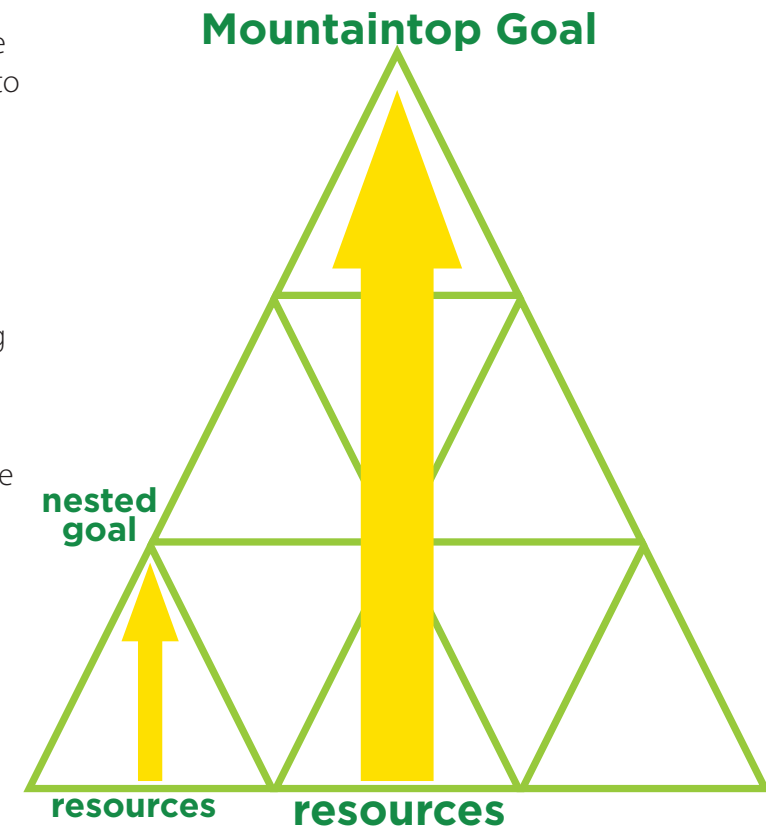
Strategic goals are clear and measurable. To reach our **mountaintop goals**, we start with **smaller goals** and work our way up.

As a guide, goals:

- Are as **measurable** and **quantifiable** as possible (e.g., gather 1,000 signatures, collect \$10,000, put in 80 hours of training)
- Focus **resources** on achieving the goal (e.g., if getting 1,000 people to speak to their elected representatives is needed, using most of the team to organize a rally won't be effective)
- **Strengthen your team** (i.e., continue learning and developing skills amongst the group)
- Can be **replicated** (e.g., a great canvass kit can be used in multiple locations across the city)

Step 4: Identify the Power

In community organizing, the theory of change is based on power relationships. In this context, power is not something you have because of your position in an organization. Instead, organizers see





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STRATEGIZING

power as the influence created by working with people and organizations with shared interests. The way interests and resources are combined is known as the **balance of power**. This imagines power as a fulcrum in which you use tactics to equal or outweigh the challenge your constituency is facing. Keeping this in mind, you can use power in two particular ways:

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

For example, you may start with people with shared interests to organize a community garden (Power With) and then discover that you need to get the city government to approve the leasing of the garden space (Power Over).

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

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

Power must be identified in order to form effective strategies. For instance, if you are writing a petition to an elected official, make sure you send it to the official who can make a difference.

Power can also be identified on being at one of three levels:

Level 3: Invisible Power – Systemic, institutional issues like racism, patriarchy, and colonialism. These are larger, socially constructed norms not associated with particular people but systems of people and power.

Level 2: Agenda Power – Access to the “halls” of power, like Parliament Hill, City Council, or the

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STRATEGIZING

Boardroom – places where the decision makers are, and the people who have access to them such as their staff and journalists.

Level 1: Visible Power – Common power, like police, money, 100,000 people on a listserv, five million followers on Twitter, physical manifestations of power (i.e., election signs), 10,000 people at a rally.

Critical to your success is political pressure.

Here are some suggestions:

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

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

Action is also critical. Meet with your local elected representative to press your point. Remember: **your representative is your employee.** Bring a large group of neighbours to the meeting OR a letter signed by at least a hundred neighbours. Neighbours are better than a wider community of interest or co-workers because you and your neighbours have the same employee – this MP or Councillor who may soon be up for re-election. Learn the names of all staff members at the elected official's office and thank them for facilitating this meeting. Staffers are the gatekeepers who maintain schedules and provide support and advice to the politicians.

Your demand should be be very specific. For example, "Will you vote in favour of my issue (yes or no)?" or "Will you write a letter to the minister and make a statement in the House of Commons?" Bring a sample statement (the more succinct the better – no more than 100 words) that can be used by the politician.

Followup is important. Return with your neighbours to the same representative and ask for results. At your first meeting, book a return date to find out if your representative has made good on your requests – and so the representative knows he or she has to provide results.

If the elected person works hard for you and delivers results, publicly acknowledge that effort; celebrate victories with an event or a letter to the editor. If your representative is dead set against what you stand for, then mobilize your neighbours and do massive outreach so this politician can be

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STRATEGIZING

defeated at the next election. Find a candidate who supports your cause and get her or him elected. Finally, remember to share credit with your allies and neighbours and celebrate small victories.

Step 5: Theory of Change

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 for 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.



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STRATEGIZING

A Theory of Change statement uses this format:

If we do... (STRATEGY + TACTICS)

Then... (STRATEGIC GOAL or CHANGE)

Because... (REASON)

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

Good Example

IF we can demonstrate student power and organize 200 students to use nickels to pay their transit fares,

THEN we will be able to persuade the Transit Authority to give students a monthly pass,

BECAUSE we will be able to illustrate how much faster students (and other passengers) can use the transit system.

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

In a Canadian federal election, a partisan theory of change might look 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. A single campaign may have many local theories of change nested within a broader campaign.

Bad example

IF I get 5,000 people to sign up by August 30, to march against climate change in front of Suncor's Headquarters,

THEN the Prime Minister will say no to pipelines,

BECAUSE he will see the power of our protest.



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STRATEGIZING

In this case, the strategies do not draw on a credible theory of how to change the balance of power because they have chosen the wrong target.

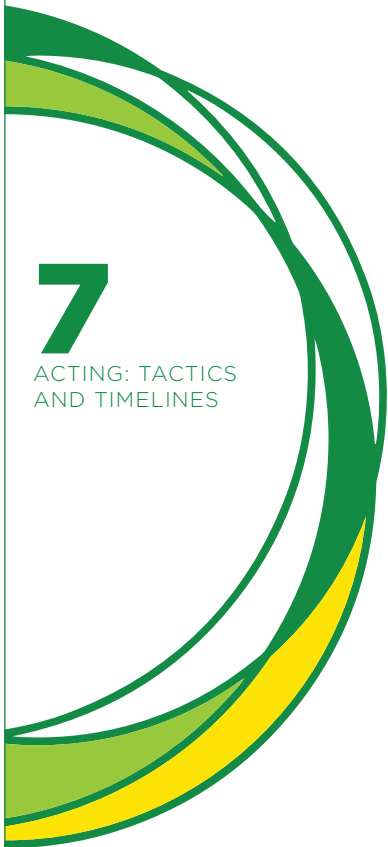
In closing, strategy is simply turning the resources you have, into the power you need, to get what you want.

Theory of Change vs. Organizing Sentence

A theory of change is based on locating power. It is used for determining strategy and tactics. An organizing sentence is very specific: who are you bringing together, towards what goal, what and how are you going to achieve that goal, and by when.

You should have one organizing sentence, but you can have many theories of change based on different goals. Each smaller goal you are working towards should have its own theory of change. As organizers, your theory of change should be a thoughtful, intentional expression of what you are working towards at that moment. It will help to keep your work focused and effective.





7 ● Acting: Tactics and Timelines

Key Concepts

- ñ **Tactics**, or actions, are activities used to create change.
- ñ An effective action meets three criteria:
 1. Strategic
 2. Strengthens the organization
 3. Develops individuals
- ñ A tactic hits the **sweet spot** when all three criteria overlap.
- ñ **Motivational tasks** have five characteristics:
 1. Specificity
 2. Significance
 3. Variety
 4. Autonomy
 5. Feedback and coaching
- ñ The **campaign timeline** is a strategic plotting of tactics over a set period of time.

Tactics: Strategy in Action

We put strategy into practice by implementing tactics. Just as it's important to set effective strategic goals, **it's important to choose effective tactics to meet those goals**. Your organizing effort will quickly run into problems if your tactics fail to move you closer to your goal. Similarly, if you spend all your time strategizing without putting it into practice via tactics – you will have wasted your time. Strategy without tactics is just a bunch of nice ideas.

The “Sweet Spot”

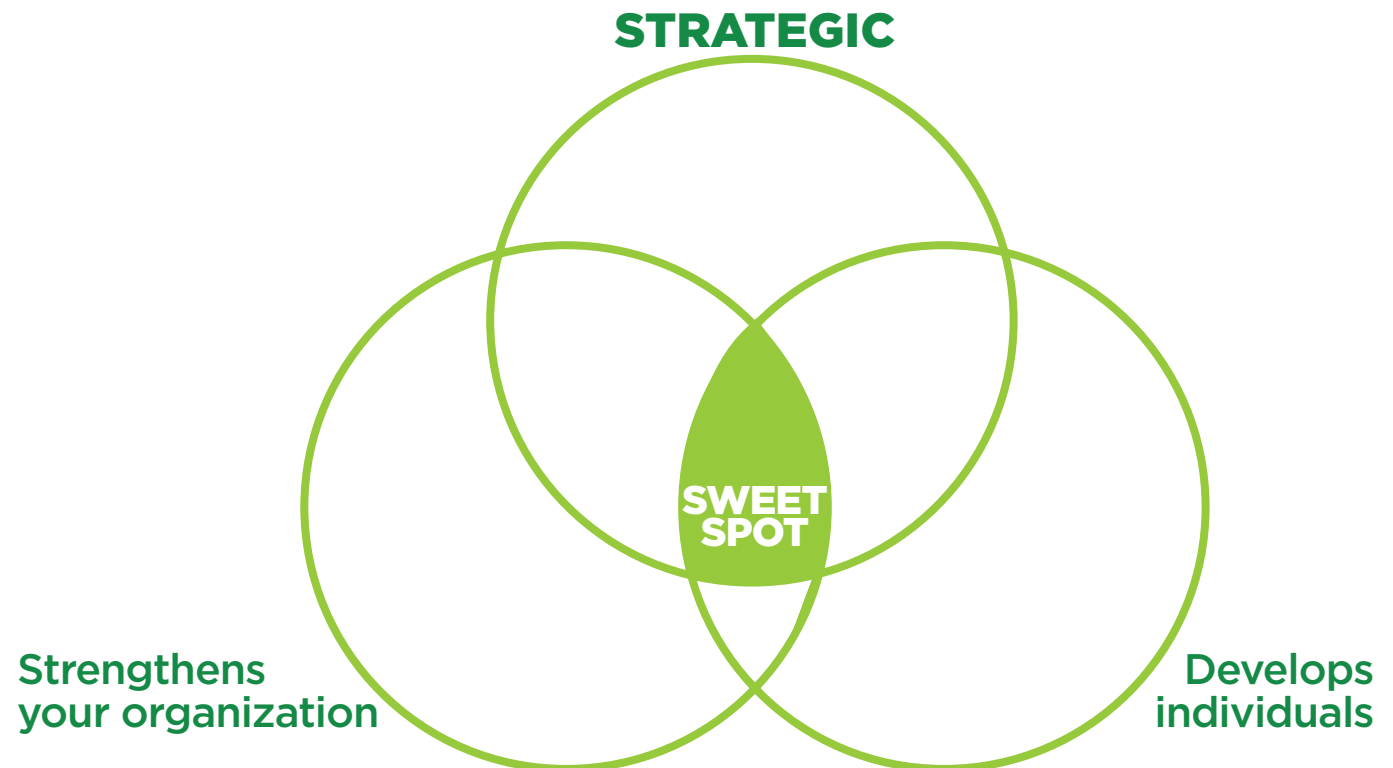
A tactic is most effective when it meets three criteria:

- 1. Strategic:** the tactic results in concrete, measurable progress toward your campaign goals.
- 2. Strengthens your organization:** the tactic attracts new people to your campaign which strengthens your community’s ability to make change.
- 3. Develops individuals:** the tactic builds the leadership skills and capacity of your people.

When choosing tactics to implement your strategy, aim for the “sweet spot” where all three criteria overlap.

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ACTING: TACTICS
AND TIMELINES





7

ACTING: TACTICS AND TIMELINES

Commitment and Action

Action requires leaders to engage others in making firm commitments to achieve specific, measurable outcomes. We can't achieve our goals on our own, so we need others to join us.

Designing Motivational Tasks

Action requires leaders to engage others in making commitments to achieve specific, measurable outcomes. But it's not just about getting people to complete tasks.

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, 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.

Organizers design effective tasks with the following characteristics in mind.

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ACTING: TACTICS
AND TIMELINES

Characteristics of Motivational Action

1. The task is **specific** and clear to volunteers.
2. The task is **significant**. Taking time to explain the significance of the task to your volunteers will contribute to its success. People are more likely to participate when they feel they are truly contributing to a greater goal.
3. The task uses a **variety of skills**. An effective task will use head, heart, and hands. Tasks will appeal to different learning styles like auditory, visual, written, and kinesthetic. The task will allow your participants to try different skills and approaches.
4. The task has a degree of **autonomy**. Giving participants a level of responsibility suitable for their skills and abilities provides a sense of ownership of the work.
5. **Feedback and coaching** is provided to participants. Measuring success, communicating progress, and providing coaching builds healthy relationships and develops leadership.

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

The Campaign Timeline

Campaigns are an important part of organizing. They are bursts of activity targeted towards goals. There can be many campaigns of varying priority happening at the same time, but all must contribute to a goal(s). Working together, we build our campaigns upon one another to continuously move our capacity and resources upwards. The key to this process is constantly evaluating and learning from all tactics involved.

Timelines generally have the following features:

- **Foundation:** During this period, the goal is to create the capacity needed to launch a campaign. A foundation period may last a few days, weeks, months, or years, depending on the scope of the undertaking and the extent to which you start 'from scratch.' You should plan how you will focus on leadership development and capacity building.

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ACTING: TACTICS AND TIMELINES

- ñ **Kickoff:** This is the official beginning of the campaign. Setting a kick-off date creates urgency, focus, and the commitment needed to get things going. Implementing a tactic that supports your campaign in its infancy is also important.
- ñ **Peaks:** A campaign proceeds toward a series of peaks, each one building on what has come before. Each peak is a goal and the goals should build on one another.
- ñ **Mountaintop peak:** This is the ultimate goal of the campaign. We hope to get here, but it takes a lot of work.
- ñ **Valleys:** Tactics take time and energy from your team that must be replenished. This means focusing on relationship-building after events so your team feels connected and supported. Whenever possible, apply the “Act, Recruit, Train,” (ART) approach to those who joined an event. After you take action, you should have a sense of which new volunteers have potential.

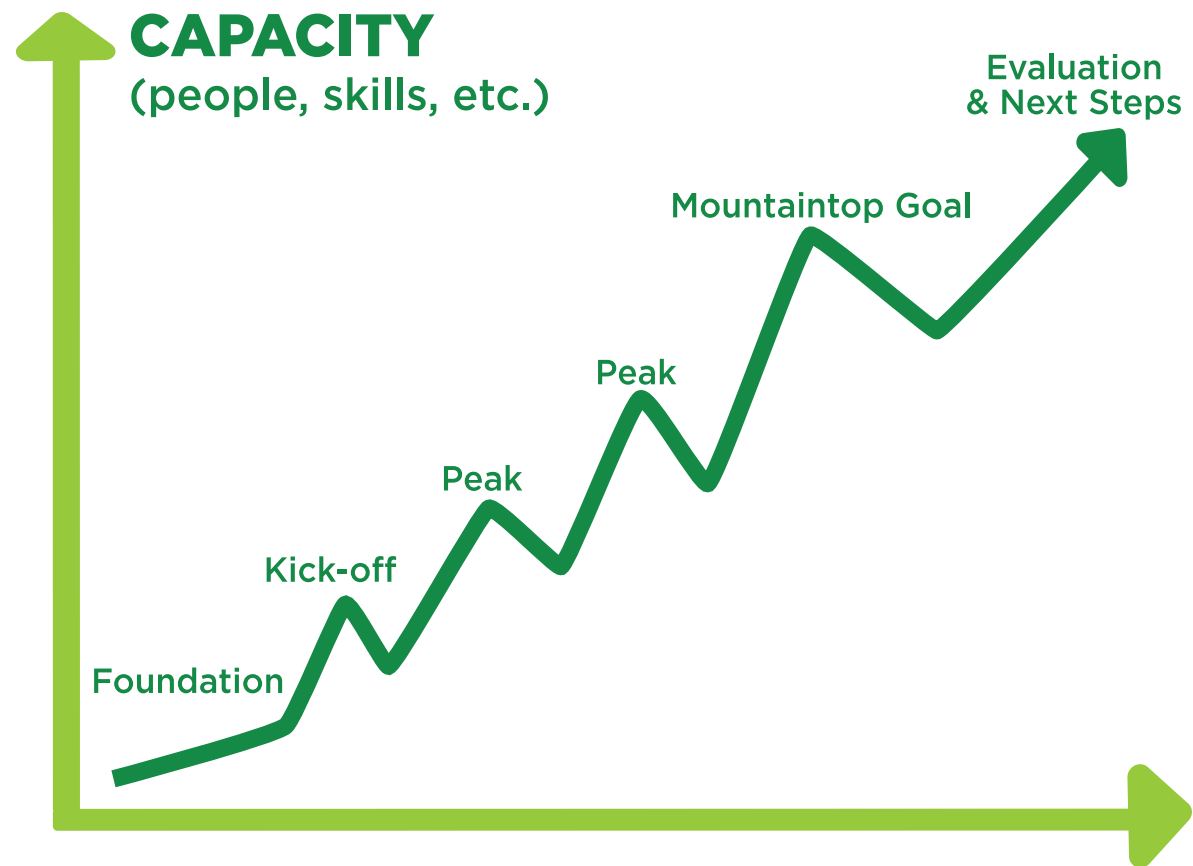


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ACTING: TACTICS
AND TIMELINES

It's important to celebrate after actions so you can build relationships with new participants and create momentum. Recruiting includes following up with new participants individually to secure their commitment to remain involved. Training can be understood broadly as the time we invest in coaching new volunteers so they can move up the ladder of engagement in your organizing campaign.

Before any event, make sure the next few events are scheduled. This way, even if volunteers aren't available for this specific event, you can tell them about upcoming campaign events they can still participate in.





7

ACTING: TACTICS AND TIMELINES

Win or lose, a campaign should always conclude with evaluation, celebration, and preparation for next steps. When we win, we are sometimes so caught up in celebrating, we forget to analyze why and how we won, what we did right or wrong, and recognize those who contributed. When we lose, we should analyze and evaluate, but also celebrate the hard work, commitment, courage, and achievements of those involved in the campaign. The important thing about campaigns is there will be a 'next time' and we must use what we've learned to prepare for it.

Unsuccessful tactics

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



Join the
Movement
for
Decent Work

8. Tying It All Together



8

TYING IT ALL
TOGETHER

This guide has provided an introduction to organizing leadership that enables people to join forces and turn the resources they have into the power they need to make the change they want. We've outlined the five key leadership practices – telling stories, building relationships, structuring teams, strategizing, and acting – that form the 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 connects us to one another and is key to building strong relationships. By building relationships, we secure commitment from our communities and strengthen and grow a constituency. In turn, relationships are the glue that bind effective teams together, and we structure teams so that we can work together in a sustainable and empowering way.

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

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

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



WORKSHEETS

Organizing Sentence

Use this tool to clearly state the main components of your strategy and organizing plan.

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).



1

WHO are you organizing? (e.g., I am organizing 5 people on my street)

I am organizing:

2

WHAT is your goal? (e.g., to have a bike lane added to our street)

Our goal is:

3

HOW do you plan to achieve it? (e.g., through canvassing and direct action)

The actions we will take are:

4

WHEN does change need to happen (e.g., before the next municipal election)

Our timeline is

Preparing Your Public Narrative

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."

Consider the following when crafting your story of self:



1 Where you come from:

- Where were you born and raised?
- Who shaped your upbringing? (family, friends, role models)
- Are there any significant childhood events or memories that have had an impact on the person you are today?

2 Who you are:

- What are you passionate about? (interests, hobbies, talents)
- Are there any significant experiences that have had an impact on your life choices? (school, travel, work, family, or partners)

3 How you got involved:

- What was your first organizing experience? (volunteering, voting, attending a rally or protest)
- Was there a specific event or person that inspired you to act?

Coaching Stories



Step 1: Ask Questions

Start by asking:

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

"If you were to tell it again, would you change anything?"

If yes, "what would you say differently?"

Share some of your first impressions, then give them time to speak to your observations.

"I noticed you said _____ while telling your story, what was your reasoning for that?"

"When you said _____, in the story, what did you mean by that?"

"I really like _____ part of your story. How could you change it to give that part more time?"

Step 2: Pay Attention

As you're listening, reflect on the story and ask yourself the attendant questions.

Repeat some of your reflections back to the storyteller using the sample statements.

A. Challenge, Choice, Outcome

- ñ What specific challenges did the storyteller face?
- ñ Did the storyteller paint a clear picture of those challenges?
- ñ Was a clear choice made in response to the challenge(s)?
- ñ What was the outcome of the choice(s)?

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

"How would you describe the outcome of your choice?
I heard _____ or learned _____. Is that what you intended?"

B. Values

- ñ Could you identify the storyteller's values and where they come from?
- ñ Did you hear the storyteller voice or describe certain emotions?
- ñ 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

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

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

"Your story hooked me at _____ point, because..."

Story of Self

Your Story of Self shows who you are, the choices that have shaped your identity, the lessons you've learned from those choices, and the values that guide you. **Remember: Your Story of Self is a narrative, not a biography.**



Be sure to include the following in your Story of Self

- The challenge you faced: what it looked like and how it felt
- A setting: where you were and what it looked like
- How you felt emotionally and physically
- A specific choice you made
- The lesson you learned, how it felt, and the concrete change you saw

1

Your Challenge: _____

- Why did you feel it was a challenge?
- What was so challenging about it?

2

Your Choice: _____

- Why did you make the choice you made?
- How did it feel?

3

Your Outcome: _____

- How did the outcome feel and why?
- What did it teach you?

Story of Us

The Story of Us identifies the values and experiences you share with your audience and builds a sense of unity and common purpose.

Your Story of Us should:

- Make clear your connection to the audience
- Spell out your shared values
- Evoke a time your community came together successfully to solve a similar challenge
- Convey hope about your community's future
- Specify the choice your community faces



1 Identify your Challenge: _____

- What experiences have had the greatest impact on this community?
- What is our current challenge?

2 Choice: _____

- What specific choice did we make? What action did we take?
- What specific change does this community hope for and why?

3 Outcome: _____

- What have been the outcomes of my community's past organizing?
- What change does my community hope for?

Story of Now

The Story of Now identifies the immediate challenge facing your community, communicates the threat this challenge poses to your shared values and future, and concludes with an urgent call to action.



When writing your Story of Now, be sure to:

- Explain why your issue is urgent and your audience must act now
- Convey your strategy/theory of change
- Describe the dream for your community and the nightmare if you don't act
- Include a hard ask

1

Challenge: _____

- What will the future look like if we fail to act?
- What stories or images can you convey to make the challenge real for your listeners?

2

Choice: _____

- What specific action are you asking your people to do?
- By when?
- How will their action make a difference?

3

Outcome: _____

- What could the future look like if we do act?

Telling Your Stories: Public Narrative

Use this space to combine your Story of Self, Story of Us, and Story of Now. Together, they become the public narrative you will use to inspire others to action.



Story of Self

(What motivates you to be a change leader? Pick one choice that brought you here today.)

Story of Us

(Includes the shared values of your community, the change they want, and why.)

Story of Now

(What specific action do you need people to take now? How can they do it? By when?)

Practice: One-on-Ones



One-on-one meetings build relationships that prepare and strengthen communities for action. The goal of this session is to practice sharing your stories and getting a commitment in a 1:1 conversation. A successful 1:1 builds a relationship by telling/sharing your stories so you can end with getting a commitment. If either piece is missing, the one-on-one could have been done more effectively. Keep in mind, a 1:1 is a relationship – it's probing, purposeful, scheduled for a specific location, time, and duration, and is about securing a commitment to perform a specific action.

Agenda

- 1.** In your team, appoint a team time-keeper and a note-taker.
- 2.** Break into pairs with a person you don't know. Make a rough agenda for your recruitment 1:1. You can use the checklist on the next page as a template. It's not a script, but a chance to order your thoughts and plan a hard ask.
- 3.** Practice a 1:1 with one person as the organizer who moves the conversation from story, to identifying each other's interests and resources, to explaining the strategy, to conveying purpose and urgency, to getting the commitment. The organizer fills out their sheet.
- 4.** Give feedback to the "organizer" who led the 1:1. What connected with you? What didn't? Why did you commit or not commit?
- 5.** Switch and have the other partner act as the organizer making their recruitment 1:1 pitch.
- 6.** Give the "organizer" who led the 1:1 feedback. What connected with you? What didn't? Why did you commit or not commit?
- 7.** Report back to the team. Each pair reports the interests and resources they identified in each other that the group's note-taker will record.

Checklist: One-on-Ones

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

- Do you have a hard ask and back-up ask prepared before the meeting?
- Be clear about why you are meeting today
- Share parts of your public narrative
- Share experiences and motivations
- What resources can they offer?
- What resources can you offer?

- Find common organizing interests (e.g., poverty)

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

- Find shared value



- Clarify your next steps together

- Make your hard ask – Don't apologize for asking

- What is your back-up hard ask?

- Get a commitment

Add any more best practices you can think of.

Strategy Goals

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



Mountaintop Goal

This is your BIG “We’ve done it!” goal. It’s where you want to go, but you need to start in a more manageable place.

Incremental (nested) Goals

Incremental goals are smaller, more manageable goals that contribute to your “mountaintop goal.” These are what your strategy and tactics should focus on while keeping the larger goal in mind.



Strategy: Theory of Change



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

Guiding Questions

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

Power

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

Limited resources DOES NOT equal less power.

COLLABORATION is the pooling and sharing of resources and interests. Power comes from strong, deep, and trusting relationships..

My Theory of Change

If (Strategy): _____

Then (Goal): _____

Because (Reasoning): _____

Tracking Down Power



Share Organizing Sentences

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

Spectrum of Allies

- ñ Use the chart in the next worksheet to identify people and/or organizations that are affiliated with your campaign. **Worksheet XV**
- ñ Plot the actors on your “spectrum of allies” graph. **Worksheet XVI**

Tactics

- ñ Brainstorm Tactics in **Worksheet XVII**
- ñ Discuss which tactics best fit the tactical “sweet spot”
- ñ Plot tactics on timeline in **Worksheet XVIII**

Strategy: Who are Your People?



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

Your Leadership

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

Your Constituency

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

Your Supporters

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

Your Competition

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

Your Opposition

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

Strategy: Spectrum of Allies

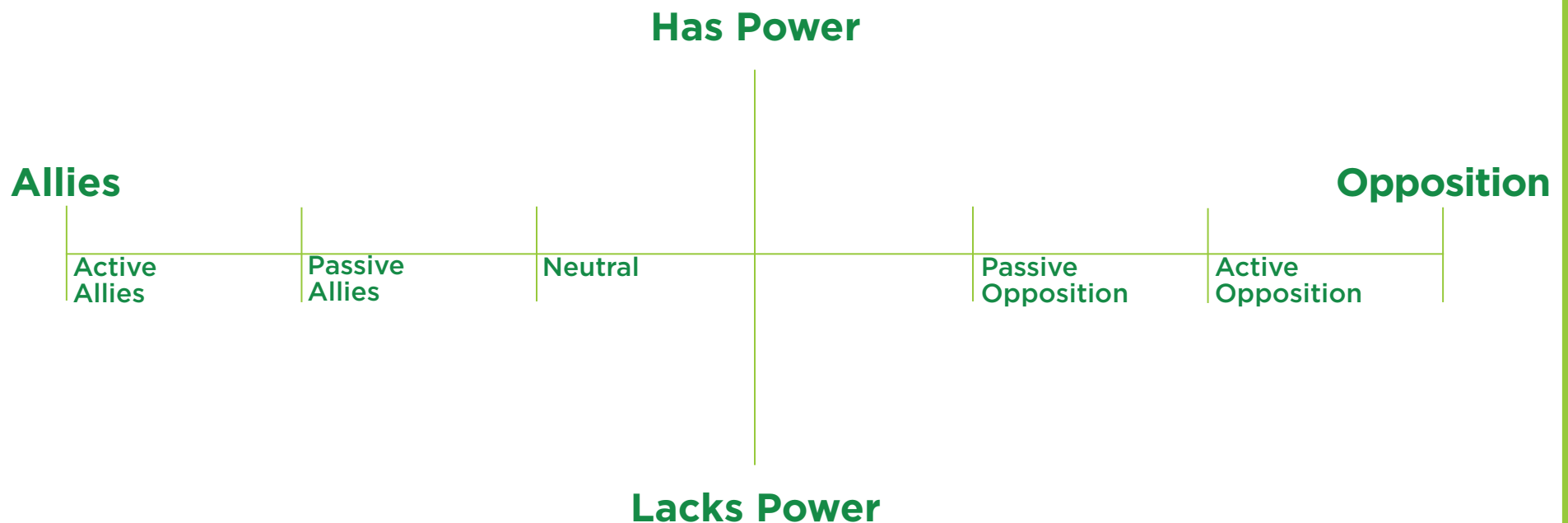


The Spectrum of Allies is used to identify which groups and key individuals you should reach out to and collaborate with or move. Start by adding groups and people who are affected or involved in your campaign. Keep in mind the following:

- Typically, your group is the leading ally
- Active allies are involved but not leading
- Passive allies are supportive but not active
- Those who are neutral might be undecided or unaware of the issue
- Passive opponents are opposed but not active
- Active opponents are opposed and are also active
- Leading opponents are your direct opposition, actively opposed in a leadership position

Most groups choose one or two priority stakeholders to reach out to and “move” in a campaign. It’s a huge win when a stakeholder moves even a little closer to your side. Once you’ve filled in the chart, decide which stakeholders you are best equipped to move. Once identified, decide what strategies, tactics, and messaging will enable you to move these stakeholders closer to your side.

Your goal is to move key targets towards being active allies, and to empower your allies through stories, relationships, tactics, and an effective structure. If you have an active opposition, you should aim to neutralize them as much as possible.



Tactics: Actions and Analysis

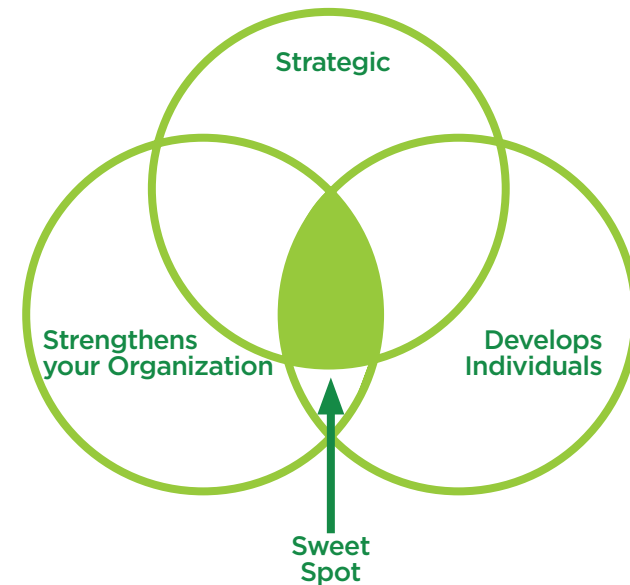
A tactic is a specific action that you and your team undertake to work towards your goal. Anyone can come up with tactics, but we want to choose tactics that work.



Analysis: The Sweet Spot

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

- 1. Strategic:** Will this tactic have a measurable effect on the problem?
- 2. Strengthens the Organization:** Does this tactic/action develop and build capacity within the group? Does it enhance the ability to do more work in the future?
- 3. Develops Individuals:** Does this tactic require training and provide opportunity for growth?



Tactics/Actions

Hits the Sweet Spot?

	Y or N
	Y or N
	Y or N
	Y or N
	Y or N
	Y or N

Tactics: Campaign Timeline



Kick-Off: _____

Tactic 1: _____

Tactic 2: _____

Tactic 3: _____

Goal: _____



Transformative Task Redesign



Ensuring that people have a meaningful experience when they join us in action is very important if we want them to continue to commit to us. If people don't feel like what they are doing is important, or if they feel they aren't growing and learning, they will become less inspired to act next time. Use the transformational task chart below to analyze how you can make a task more meaningful.

	What you currently do	What you could do
Task Identity Do volunteers understand the project from start to finish?		
Task Significance Do volunteers understand the importance of their task and see the impact it has?		
Skill Variety Do volunteers use a variety of skills during this task?		
Autonomy Do volunteers have the agency to make their own choices about how they perform the task?		

Write out your redesigned task:

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