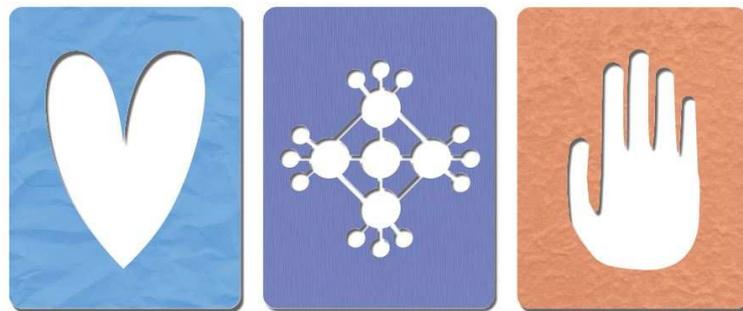


Leadership Development Initiative: Practices of Leadership and Organizing

The spirit of the Lord God is upon me, because the Lord has anointed me; he has sent me to bring good news to the oppressed, to bind up the brokenhearted, to proclaim liberty to the captives, and release to the prisoners. —Isaiah 61:1



leadership development initiative

Jan 25-26, 2013

CHURCH OF THE REDEEMER
CHESTNUT HILL, MA

Originally adapted from the works of Marshall Ganz of Harvard University
<http://www.hks.harvard.edu/about/faculty-staff-directory/marshall-ganz>

Modified by the New Organizing Institute
<http://www.neworganizing.com>

Designed by Zac Willette

ACKNOWLEDGEMENTS

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below.

This workshop guide has been developed over the course of many trainings by Liz Pallatto, Joy Cushman, Jake Waxman, Devon Anderson, Rachel Anderson, Adam Yalowitz, Kate Hilton, Lenore Palladino, New Organizing Institute staff, MoveOn Organizers, Center for Community Change staff, Jose Luis Morantes, Carlos Saavedra, Sean Thomas-Breitfeld, Shuya Ohno, Petra Falcon, Michele Rudy, Hope Wood, Josh Daneshforooz, Kendyll Hlllegas, Duncan Hilton, Ella Auchincloss and many others.

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LAUNCHING THE CAMPAIGN

Goals for the WEEKEND

- Expand the capacity of participants to lead transformational, life-affirming change: within local community; within organization/church/families; within themselves. This will happen by training teams to:
 - Practice and coach the craft of public narrative and understand its many uses
 - Practice 1:1 relationship-building skills and think strategically about whom to cultivate relationships with
 - Establish clear shared purpose, norms, and roles on teams
 - Develop strategic goals campaign timelines that align with their motivating visions

Friday, January 25		
5:30 pm	Registration	
6:00	Opening Worship (30)	
6:30	Dinner (Working/listening) (15)	
6:45	Training Goals, Agenda Review, Norms (10)	
6:55	Introduction to Leadership Through the Practice of Organizing (20)	p. 11
7:15	Introduction to Public Narrative: Story of Self (30)	p. 16
7:45	Teamwork: Story of Self (50)	p.21
8:35	Debrief and Key Learnings (15)	
8:50	Evaluation (5)	
8:55	Closing Prayer (5)	
8:30 am	Breakfast	
9:00	Opening Worship (25)	

Saturday, January 26

9:25	Building Relationships (30)	p. 26
9:55	Teamwork: 1:1 Breakout (30)	p. 29
10:30	Debrief (5)	
10:35	Break (10)	
10:45	Spiritual Practice: Chant (5)	
10:50	Building Strong Teams (25)	p. 32
11:15	Teamwork: Building Strong Teams (35)	p. 35
11:50	Debrief	
12:00 pm	Midday Worship (10)	
12:10	Lunch (30)	
12:40	Strategy in Organizing (30)	p. 40
1:10	Teamwork: Strategizing as a Team (65)	p. 50
2:15	Debrief (15)	
2:30	Break (10)	
2:40	Public Narrative: Linking Stories of Self/Us/Now (20)	p. 57
3:00	Spiritual Practice: Silence (10)	p. 7
3:10	Teamwork: Linking Stories of Self/Us/Now (50)	p. 59
4:00	Debrief (20)	
4:20	Energizer and Norm Corrections (5)	
4:25	Next Steps and Evaluation (15)	p. 63
4:40	Closing Worship (20)	
5:00	Conclusion and Good-byes	

ABOUT LDI

LDI's Mission:

The DioMass Leadership Development Initiative is dedicated to **developing leaders who are agents of transformation for the mission of God in the world.**

Call to Action

Every generation has the opportunity, and the **responsibility, to tell the story of Jesus.** We have chosen to act together in hope, believing that the story we tell and witness to in our churches today can be a powerful, relevant reflection of Christ. In the words of Brian McLaren, we have chosen to “grow communities *where you do not simply learn or learn about, but where you **learn to live in the way of love.***”¹ (*this sentence doesn't make sense to me*)

Parish Calls

Every parish that participates with LDI will **decide for themselves on a local Call to Action**; an urgent need in their community that demands their participation. Their unique project will be an expression of that need (food justice, housing, relationship-building etc) and a reflection of Christ to the surrounding community.

Teams, Leaders & Action

While Calls to Action vary greatly from parish to parish, we find that there is a common root and motivation for many parishes in their desire to work with LDI – a **deficit of leadership skills** in their communities of worship.

The Challenge

Whether demonstrated by a scattered group of individuals, the lone leader disengaged from the reality of their community; or by the all too common ‘committee’ of a half-dozen folks who are responsible for everything at church - leadership deficit is a major challenge. We must form leaders more strategically, and witness to the community more powerfully.

The Choice

As such, the LDI is dedicated to forming prayerful and prophetic Christian leaders who **lead together, not alone.** At each of the 2013 LDI sites, individuals will participate in peer **Leadership Teams.** As Leadership Team members, they will receive extensive, professional leadership training and coaching in the five leadership practices. Teams will be collectively responsible for designing, organizing and implementing their local projects. Through their work, they will learn how to apply their skills, and begin to teach these skills to others.

¹ McLaren, B (2010), *A New Kind of Christianity*, Harper Collins, pg. 170.

The LDI Leadership Team:

- The Rev. Canon Steven Bonsey, Team Chaplain, Cathedral of St. Paul, Co-Founder of LDI
- The Rev. Arrington Chambliss, Director, Life Together Intern Program, LDI Training Team
- The Rev. John de Beer, Rector, St Marks Burlington MA
- The Rev. Karen Montagno, Diocesan Parish Liaison
- Ella Auchincloss, MTS, Director of Training, Organizing for Health, Founder/Director of LDI
- Duncan Hilton, LDI Program Director

LDI 4.0 Timeline:

January 25 and 26 2013:

- 1.5-day training on *the 5 Leadership Practices* at Church of the Redeemer in Chestnut Hill

February-May 2013:

- Teams launch their Missional Projects
- Teams receive monthly on-site coaching workshops from LDI trainers to develop the learning and leadership of team members and provide support and accountability on project goals

Feb 26, Mar 19, Apr 23, May 21 at 7 pm

- Free 60-minute webinars to provide additional coaching and training

June 5, 2013, 6-9 pm:

- Teams gather to share and celebrate at Church of the Redeemer in Chestnut Hill

Previous Participants:

- Iglesia San Pedro, Salem
- Christ Church, Swansea
- Grace Church, Medford (Years 1,2,3)
- St. Andrew's, Hanover
- Trinity Church, Newton Centre
- St. Paul's Church, Newburyport
- Christ Church, Plymouth
- St. Mark's Church, Burlington
- St. Andrew's Church, Framingham (Years 2,3)
- ECM Congregational Justice Network
- Christ Church, Waltham
- Jubilee Ministries, Boston
- Church of the Holy Spirit, Wayland
- St. Paul's, Peabody

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THEOLOGY AND WORSHIP

We believe that, as individuals and teams, we discern and sustain our action through spiritual practice. We draw on three Christian traditional practices and invite teams to try them as well.

Silence

1. Choose an 'anchor word'

- a. Let it be a simple word that expresses your prayer and the desire of your heart
- b. It may be a word of one syllable – “God”, “Love”, “Joy”, “Peace”
- c. It may be the ancient Christian prayer, “Maranatha”, Come Lord Jesus

2. As you enter the silence, rest your attention on your word

- a. Let the word take you deeper into prayer
- b. Dwell on your word, not only with your mind but with your heart
- c. Let your heart open up more and more to God's loving presence

3. As you notice thoughts coming into your mind, simply acknowledge them and return to your anchor word

- a. Think of the thoughts as objects floating on the surface of a stream
- b. Don't try to stop them, but simply let them go, while you return to your anchor word
- c. Let the anchor word take you deeper into the quiet and stillness of the deep water

4. As often as you notice yourself becoming distracted, simply return to your word and begin again

- a. Brilliant insight? Let it go. It won't be lost.
- b. Something urgent you must remember to do? Let it go. This time is for God.
- c. Bored? Restless? Self-conscious? Simply return to your word, and begin.

5. The value of the practice lies in letting go of thoughts and feelings and turning again to God.

- a. With the regular practice of silent prayer, we develop an inner watchfulness that allows us to detach from patterns of thought and emotion that are hurtful to ourselves and others or that separate us from God.
- b. Every time we consciously release a thought or emotion, we free ourselves from captivity to our ego-driven impulses. Every act of letting go is a Christ-like dying to self.
- c. As we are able more and more to put aside our self-centered agendas in prayer, the more we are able to open hearts in love toward God, and the more God's spirit is able to work its healing and empowering work in us.

Chant

Christian sacred chant has four elements:

1. Breath

- a. Attention to the breath is a foundation of meditative practice in all spiritual traditions of the East and West.
- b. Breathe in fully and deeply from your diaphragm, and release the breath in a slow, easy and measured way.
- c. Breath is spirit. Every breath you take is the breath of God.

2. Tone

- a. Your voice is the creation of breath and vibration. Feel the vibration in your body as you create your tone.
- b. Your tone is your being and identity released into the world. Let your voice show up freely in the room.
- c. God spoke the world into being, and vibration is the constituent element of all matter and energy. When you create a tone, something happens within you and outside you.

3. Intention

- a. Pray the words of the chant with all your heart, all your mind and all your strength.
- b. Focus on the prayer with the attention of your mind and the intention of your heart.
- c. The quality of intention in your prayer will lift you up and inspire others.

4. Community

- a. Listen as you sing. Pay more attention to the voices on your left and right than to your own voice.
- b. Strive to blend your voice in pitch and volume with others so that you sing with one voice.
- c. If you are able, sing harmonies that will lift the collected voices to a new level and create a beauty that is greater than the sum of its parts.

Lectio divina: a method of sacred reading adapted for group practice

1. *Lectio*, or Reading

- a. A *short* passage of scripture, two or three verses, is chosen, perhaps a saying of Jesus or a few verses of a psalm.
- b. The passage is read *outloud*. Hearing a passage read is a very different experience than reading it with the eye, engaging the more creative parts of our brain.
- c. The passage is read *slowly*. This allows time for each word to resonate in the mind and the imagination.

2. *Meditatio*, or Thinking

- a. As you hear the passage read for the first time, listen for a word or a short phrase that “shimmers,” that is, that somehow calls for your attention, though you may not know why.
- b. In the silence following the reading, speak your word or phrase into the circle. This will plant it deeper in your mind and heart. Listen to the words that others speak.
- c. [The passage may be read aloud for a second time, followed by an extended silence.]
- d. Let your memory and imagination dwell on your word. What does it mean in the context of the passage? What memories does it bring up from other passages of scripture or from your own life? What feelings does it evoke? Why did this word attract your attention?

3. *Oratio*, or Praying

- a. [The passage may be read for a third time, with the question: “How is this passage calling you to live in the Reign of God today?”]
- b. Consider how your word or phrase, or the passage as a whole, may be speaking to your conscience. Is there some action or some change of your life to which you are being called?
- c. Take time to form an intention: How will you respond to this call today? Ask God for the grace to act on your intention.

4. *Contemplatio*, or Contemplation

- a. Throughout our practice of sacred reading we are not only engaging our minds and consciences, but we are opening our hearts to the movement of the spirit within us.
- b. The heart, in Christian understanding, is not a place of emotions or judgments but is rather an organ attuned to the divine presence and movement within us. As we continue in spiritual practice, the heart becomes more and more attuned in its subtle discernment.
- c. From time to time in sacred reading, the heart may open in a powerful way to the light within as we become aware of God’s presence in a heightened way as our hearts feed directly on God’s Spirit. These moments are a foretaste of our eternal enjoyment of God.

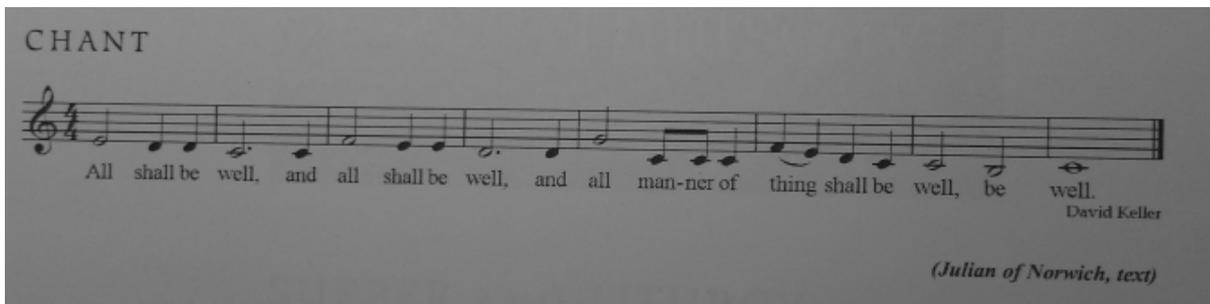
Sample Worship Outline Using the Three Practices

Adjust times and practices depending on the number of people, time, and familiarity with chant and song. Change the prayers, chants, and readings based on the season and the team's situation.

Opening Prayer

Lord of all power and might, the author and giver of all good things: Graft in our hearts the love of your Name; increase in us true religion; nourish us with all goodness; and bring forth in us the fruit of good works; through Jesus Christ our Lord, who lives and reigns with you and the Holy Spirit, one God for ever and ever. Amen.

Chant



Lectio Divina: Isaiah 60:1-2

Arise, shine; for your light has come, and the glory of the LORD has risen upon you. For darkness shall cover the earth, and thick darkness the peoples; but the LORD will arise upon you, and his glory will appear over you.

- *First reading: Listen for a word that “shimmers”. Speak it in the silence following the reading.*
- *Second Reading: Listen again for a word or phrase. Let it lead you into contemplation.*
- *Silence for 10 minutes.*
- *Third reading: Listen for how the passage is inviting you to choose God’s way today.*
- *Share in pairs (2 mins each)*
- *Share in the circle (1 min each)*

Chant

Prayers and thanksgivings

Chant

Benediction

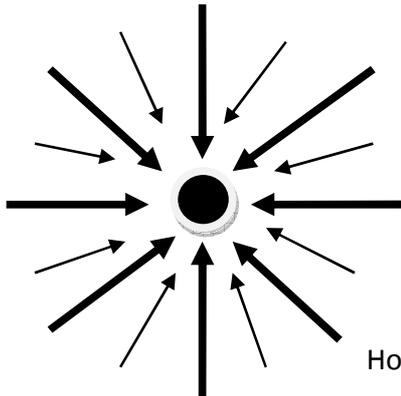
Life is short, and we do not have much time to gladden the hearts of those who make the journey with us. So . . . be swift to love, and make haste to be kind. And the blessing of God, who made us, who loves us, and who travels with us, be with us now and forever. Amen.

PEOPLE, POWER, AND CHANGE

What is Leadership?

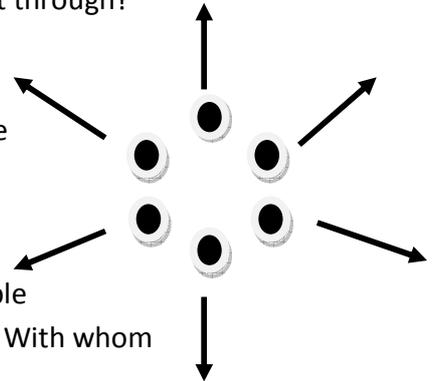
Leadership is taking responsibility for enabling others to achieve shared purpose under conditions of uncertainty. The strength of a movement grows out of its commitment to develop leadership.

Sometimes we think leadership is about being the person that everyone goes to:

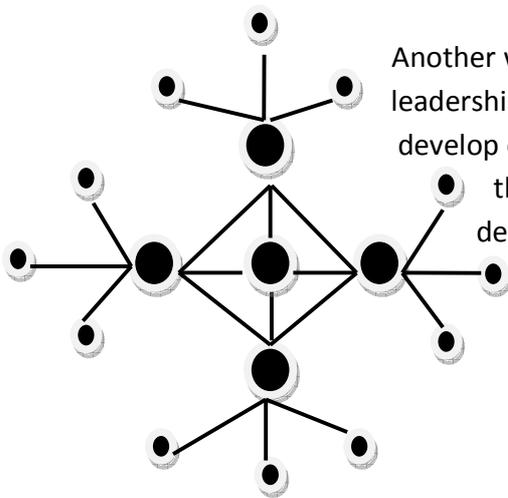


How does it feel to be the dot in the middle of all those arrows? How does it feel to be one of the arrows that can't even get through? And what happens if the "dot" in the middle should disappear?

Sometimes we think we don't need leadership at all because "we're all leaders", but that looks like this:



Who's responsible for coordinating everyone? And who's responsible for focusing on the good of the whole, not just one particular part? With whom does the "buck stop"?



Another way to practice leadership is like this "snowflake": leadership practices by developing other leaders who, in turn, develop other leaders, all the way "down". Although you may be the "dot" in the middle, your success depends on developing the leadership of others.

LDI Theory of Change: Leadership and Organizing

Organizing is a form of leadership that enables a constituency to turn its resources into the power to make change based on the recruitment, training, and development of leadership. In short, organizing is about equipping people (constituency) with the power (story and strategy) to make change (real outcomes).

PEOPLE: Organizing a constituency

The first question an organizer asks is not “what is my issue” but “who are my people” – who is my constituency. A constituency is a group of people who are “standing together” to assert their own goals. Organizing is not only about solving problems. It is about the people with the problem mobilizing their own resources to solve it . . . and keep it solved.

POWER: What is it, where does it come from, how does it work?

Rev. Martin Luther King described power as the “ability to achieve purpose.” It is the capacity we can create if your interest in my resources and my interest in your resources gives us an interest in combining resources to achieve a common purpose (power with). But if your interest in my resources is greater than my interest in your resources I can influence our exchange more than you (power over). So power is not a thing, quality, or trait – it is the influence created by the relationship between interests and resources. You can “track down the power” asking—and getting the answers to—four questions:

- What are the interests of your constituency?
- Who holds the resources needed to address these interests?
- What are the interests of the actors who hold these resources?
- What resources does your constituency hold which the other actors require to address their interests?

Our power comes from people—the same people who need change can organize their resources into the power they need to create change. The unique role of organizing is to enable the people who need/want the change to be the authors of the change, because that changes the causes of the problem (powerlessness in one form or another), not only the problem.

So organizing is not only a commitment to identify more leaders, but a commitment to engage those leaders in a particular type of fight building the power to create the change we need in our lives. Organizing power begins with commitment by the first person who want to make it happen. Without

this commitment, there are no resources with which to begin. Commitment is as observable as action. The work of organizers begins with their acceptance of the responsibility to challenge others to do the same.

CHANGE: What kind of change can organizing make?

Change is specific, concrete, and significant. It requires focus on a goal that will make a real difference that we can see. It is not about “creating awareness”, having a meaningful conversation, or giving a great speech. It is about specifying a clearly visible goal, explaining why achieving that goal can make a real difference in meeting the challenge that your constituency has to face.

Five Leadership Practices

Organizing people to build the power to make change is based on mastery of five key leadership practices. These five practices can change individuals, how their groups operate, and how the world looks, feels, and is.

DISORGANIZATION	LEADERSHIP	ORGANIZATION
Passive	Shared Story	Active
Divided	Relational Commitment	United
Drift	Clear Structure	Purpose
Reactive	Creative Strategy	Initiative
Inaction	Effective Action	Change

1. Creating Shared Story:

Organizing is rooted in shared values expressed as public narrative. Public narrative is how we communicate our values through stories, bringing alive the motivation that is a necessary pre-condition for changing the world. Through public narrative, we tell the story of why we are called to leadership (“story of self”), the values of the community within which we are embedded that calls us as a collective to leadership (“story of us”), and the challenges to those values that demand present

action (“story of now”). Values-based organizing - in contrast to issue-based organizing - invites people to escape their “issue silos” and come together so that their diversity becomes an asset, rather than an obstacle. And because values are experienced emotionally, people can access the moral resources—the courage, hope, and solidarity—that it takes to risk learning new things and explore new ways of doing things. By learning how to tell a public narrative that bridges the self, us, and now, organizers enhance their own efficacy and create trust and solidarity within their campaign, equipping them to engage others far more effectively.

2. Creating Shared Relational Commitment:

Organizing is based on relationships and creating mutual commitments to work together. It is the process of association—not simply aggregation—that makes a whole greater than the sum of its parts. Through association we can learn to recast our individual interests as common interests, allowing us to envision objectives that we can use our combined resources to achieve. And because it makes us more likely to act to assert those interests, relationship building goes far beyond delivering a message, extracting a contribution, or soliciting a vote. Relationships built as a result of one-on-one meetings and small group meetings create the foundation of local campaign teams, and they are rooted in commitments people make to each other, not simply commitment to an idea, task, or issue.

3. Creating Shared Structure

A team leadership structure leads to effective local organizing that integrates local action with state-wide, nation-wide and even global purpose. Volunteer efforts often flounder due to a failure to develop reliable, consistent, and creative individual local leaders. Structured leadership teams encourage stability, motivation, creativity, and accountability – and use volunteer time, skills, and effort effectively. They create the structure within which energized volunteers can accomplish challenging work. Teams strive to achieve three criteria of effectiveness – meeting the standards of those they serve, learning how to be more effective at meeting outcomes over time, and enhancing the learning and growth of individuals on the team. Team members work to put in place five conditions that will lead to effectiveness – real team, (bounded, stable and interdependent), engaging direction (clear, consequential and challenging), enabling structure (work that is interdependent), clear group norms, and a diverse team with the skills and talents needed to do the work.

4. Creating Shared Strategy

Although based on broad values, effective organizing campaigns learn to focus on a clear strategic objective, a way to turn those values into action and to unleash creative deliberation; e.g., elect Barack Obama President; desegregate buses in Montgomery, Alabama; getting to 100% clean electricity; etc. State-wide campaigns locate responsibility for state-wide strategy at the top (or at the center), but are able to “chunk out” strategic objectives in time (deadlines) and space (local areas) as a campaign, allowing significant local responsibility for figuring out how to achieve those

objectives. Responsibility for strategizing local objectives empowers, motivates and invests local teams. This dual structure allows the movement as a whole to be relentlessly well oriented *and* fosters the personal motivation of volunteers to be fully engaged.

5. Creating Shared Measurable Action

Organizing outcomes must be clear, measurable, and specific if progress is to be evaluated, accountability practiced, and strategy adapted based on experience. Such measures include volunteers recruited, money raised, people at a meeting, voters contacted, pledge cards signed, laws passed, etc. Although electoral campaigns enjoy the advantage of very clear outcome measures, any effective organizing drive must come up with the equivalent. Regular reporting of progress to goal creates opportunity for feedback, learning, and adaptation. Training is provided for all skills (e.g., holding house meetings, phone banking, etc.) to carry out the program. New media may help enable reporting, feedback, coordination. Transparency exists as to how individuals, groups, and the campaign as a whole are doing with regard to their progress toward their.



CREATING SHARED STORY: Story of Self

Why am I called?



INTRODUCTION TO PUBLIC NARRATIVE & STORY OF SELF

Goals for this session:

- * To learn the basics of how public narrative works: values, emotion & story structure
- * To learn criteria for an effective story of self and coach others on improving the storytelling
- * To practice and get feedback on one's story of self

Public narrative as a leadership practice

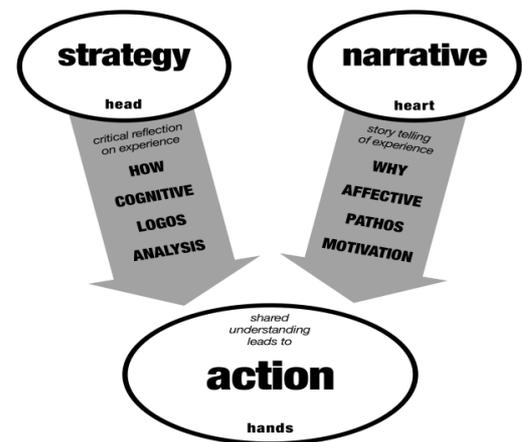
Leadership is about accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty. Narrative is how we learn to access the moral resources – the courage – to make the choices that shape our identities – as individuals, as communities, as nations.

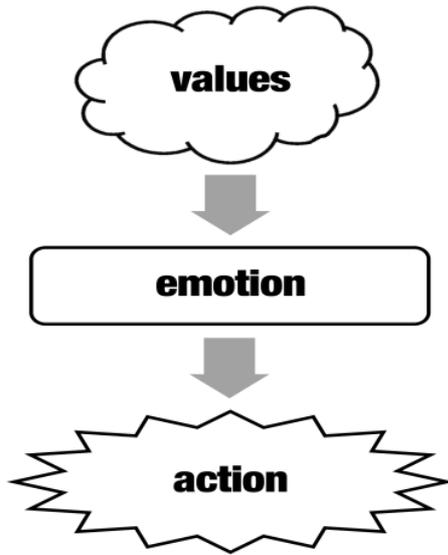
Each of us has a compelling story to tell

Each of us can learn to tell a story that can move others to action. We each have stories of challenge, or we wouldn't think the world needed changing. And we each have stories of hope, or we wouldn't think we could change it. As you learn this skill, you will learn to tell a story about yourself (story of self), the community whom you are organizing (story of us), and the action required to create change (story of now). You will learn to tell, to listen, and to coach others.

Why use public narrative? Two ways of knowing (and why we need both!)

Leadership requires engaging the "head" and the "heart" to engage the "hands"—mobilizing others to act together purposefully. Leaders engage people in interpreting why they should change their world – their motivation – and how they can act to change it – their strategy. Public narrative is the "why"—the art of translating values into action through stories.



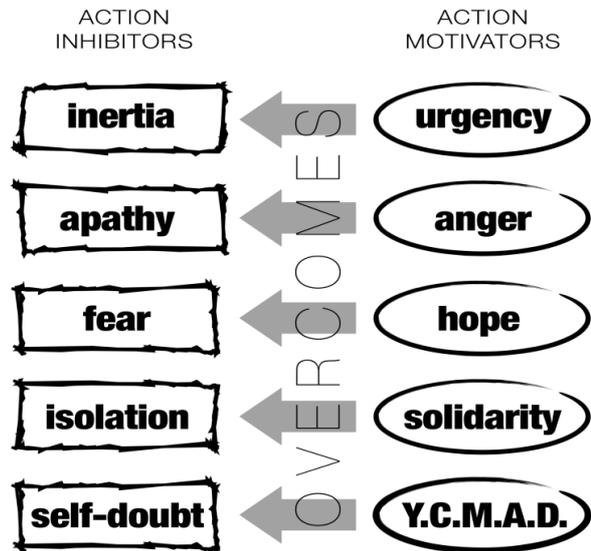


The key to motivation is understanding that values inspire action through emotion.

Emotions inform us of what we value in ourselves, in others, and in the world. And it is through emotion that we can express our motivational content to others. Stories enable us to communicate our feelings of what matters, not only our ideas of what matters. Because stories allow us to express our values not as abstract principles, but as lived experience, they have the power to move others.

Some emotions inhibit action, but other emotions facilitate action.

The language of emotion is the language of movement—they actually share the same root word. Mindful action is inhibited by inertia, fear, self-doubt, isolation, and apathy. Action is facilitated by urgency, hope, YCMAD (you can make a difference), solidarity, and anger. Stories enable us to mobilize the emotions that encourage mindful action to overcome the emotions that inhibit it.



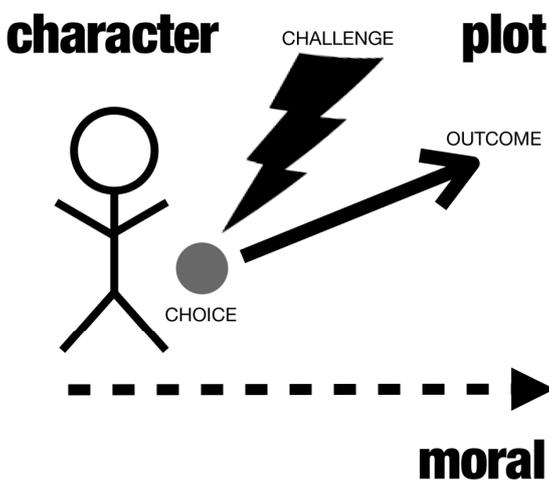
Public narrative combines a story of self, a story of us, and a story of now.

By telling a “story of self” you can communicate the values that have called you to leadership.

Public leaders face the challenge of enabling others to “get” the values that move them to lead. Effective communication of motivating values can establish grounds for trust, empathy, and understanding. In its absence, people will infer our motivations, often in ways that can be very counterproductive. Telling our story of self can help establish firm ground upon which to lead, collaborate with others, and discover common purpose.

Every one of us has a compelling story of self to tell. We all have people in our lives —parents, grandparents, teachers, friends, colleagues — or characters we love—whose stories of challenge influence our own values. And we all have made choices in response to our own challenges that shape our life’s path— confrontations with pain, moments of hope, calls to action.

The key is to focus on our choice points, those moments in our lives when we experienced the influence of our values on the choices we made that have shaped who we have become. When did you first care about being heard? When did you first experience injustice? When did you feel you had to act? Why did you feel you could? What were the circumstances – the place, the colors, sounds – what did it look like? The power in your story of self is to reveal something of those moments that were deeply meaningful to you in shaping your life’s trajectory —not your deepest private secrets, but the events that shaped your public life. Learning to tell a good story of self demands the *courage of introspection* – and of sharing some of what you find.



**The Three Key Elements of Public Narrative Structure:
What turns recounting an event into a story?
Challenge – Choice – Outcome**

A plot begins with an unexpected challenge that confronts a character with an urgent need to pay attention, to make a choice, a choice for which s/he is unprepared. The choice yields an outcome—and the outcome teaches a moral.

Because we can empathetically identify with the character, we can “feel” the moral. We not only hear “about” someone’s courage; we can also be inspired by it.

The story of the character and their effort to make choices encourages listeners to think about their own values, and challenges, and inspires them with new ways of

thinking about how to make choices in their own lives.

Narrative Structure

Incorporating Challenge, Choice, and Outcome in Your Own Story

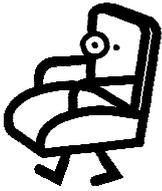
There are some key questions you need to answer as you consider the choices you have made in your life and the path you have taken that brought you to this point in time as a leader. Once you identify the specific relevant choice point, perhaps your first true experience of community in the face of challenge, or your choice to do something about injustice for the first time, dig deeper by answering the following questions.

Challenge: Why did you feel it was a challenge? What was so challenging about it? Why was it your challenge?

Choice: Why did you make the choice you did? Where did you get the courage (or not)? Where did you get the hope (or not)? Did your parents or grandparents' life stories teach you in any way how to act in that moment? How did it feel?

Outcome: How did the outcome feel? Why did it feel that way? What did it teach you? What do you want to teach us? How do you want us to feel?

A word about challenge. Sometimes people see the word challenge and think that they need to describe the misfortunes of their lives. Keep in mind that a struggle might be one of your own choosing – a high mountain you decided to climb as much as a valley you managed to climb out of. Any number of things may have been a challenge to you and be the source of a good story to inspire others.



TEAM BREAKOUT SESSION: STORY OF SELF PRACTICE WORK

GOALS

- Practice telling your Story of Self and get constructive feedback
- Learn to draw out and coach the stories of others

AGENDA

TOTAL TIME: 50 min.

1. Gather in your team. Choose a **timekeeper**. 5 min.
Have your facilitator tell his/her 3-minute story of self as an example.
2. Take some time as individuals to **silently develop your “Story of Self.”** 10 min.
Use the worksheet that follows.
3. As a team **go around the group** and tell your story one by one. 35 min.

For each person:

- 3 minutes to tell their story

- 2 minutes to offer feedback from the group (use the worksheet that follows to write down your feedback)

NOTE: You have just 3 minutes to tell your story. Stick to this limit. Make sure your timekeeper cuts you off. This encourages focus and makes sure everyone has a chance to tell his/her story.



WORKSHEET: DEVELOPING YOUR STORY OF SELF

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

1. Why am I called to leadership? What is my purpose in calling on others to join me in action? What will I be calling on them to do? *Focus on the major project on which you are working with your team. Why did you decide to tackle this specific social problem? What stories can you tell to answer these questions?*
2. What values move me to act? How might they inspire others to similar action?
3. What stories can I tell from my own life about specific people or events that would show (rather than tell) how I learned or acted on those values?

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

FAMILY & CHILDHOOD

Parents/Family
Growing Up Experiences
Your Community
Role Models
School

LIFE CHOICES

School
Career
Partner/Family
Hobbies/Interests/Talents
Experiences Finding Passion
Experiences Overcoming
Challenge

ORGANIZING EXPERIENCE

First Experience of organizing
Connection to key books or
people
Role Models

Think about the challenge, choice and outcome in your story. The outcome might be what you learned, in addition to what happened. You may even try drawing pictures here instead of words. Powerful stories leave your listeners with images in their minds that shape their understanding of you and your calling. Remember, articulating the decisions you make in the face of challenges ultimately communicates your values.

CHALLENGE:	CHOICE:	OUTCOME:



COACHING TIPS: STORY OF SELF

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

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

DO coach each other on the following points:

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

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

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

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

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

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

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

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

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

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

“Your story made me feel _____ because _____.”

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

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

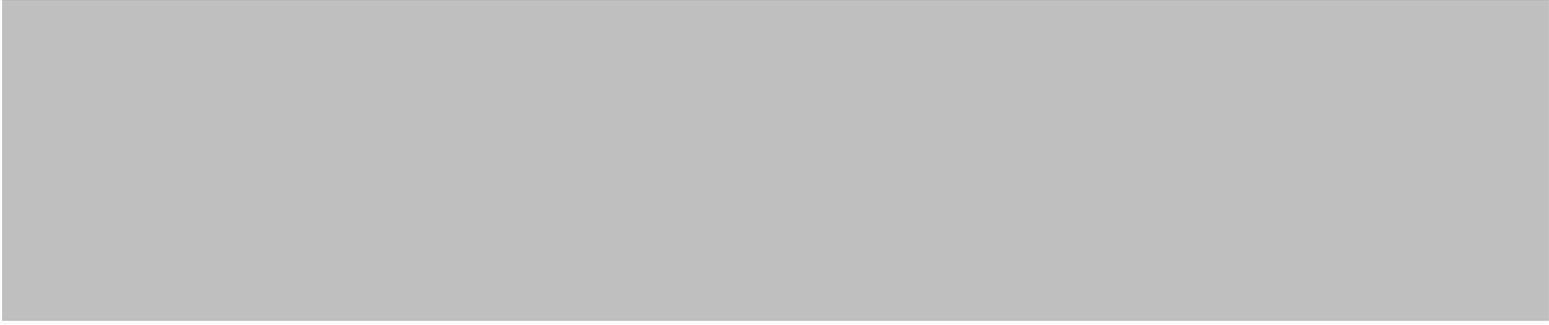
“The image of _____ really helped me identify with what you were feeling.”

“Try telling more details about _____ so we can imagine what you were experiencing.”

Record Feedback/Comments from Your Team Members Here:

Coaching Your Team's "Story of Self": As you hear each other's stories, keeping track of the details of each person's story will help you to provide feedback and remember details about people on your team later. Use the grid below to track your team's stories in words or images.

NAME	VIVID DETAILS	CHALLENGE	CHOICE	OUTCOME



CREATING SHARED COMMITMENT: Building Relationships

To whom am I committed?



BUILDING RELATIONSHIPS

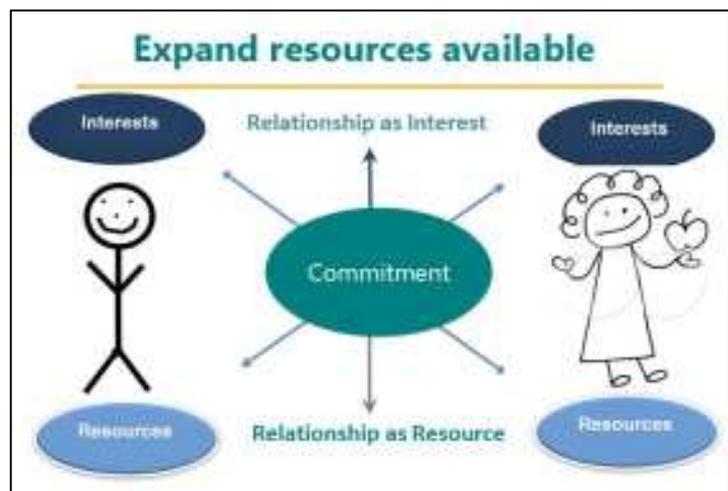
Why Build Relationships? To create commitment, the glue of an organization

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

- 1) Build Relational Commitment:** Relationship building doesn't end when action starts. Commitment is how to access resources for organizing – especially when you come up against competition, internal conflict, or external obstacles. Commitment is based on relationships, which must be constantly, intentionally nurtured.
- 2) Expand Resources:** Leaders, in turn, continually reach out to others, form relationships with them, expand the circle of support, grow more resources which they can access, and recruit people who, in turn, can become leaders themselves.
- 3) Build Capacity:** We build relationships with potential collaborators to explore values, learn about resources, discern common purpose, and find others with whom leadership responsibility can be shared so that we can make meaningful change.

What Are Relationships?

- ☑ **Relationships are rooted in shared values.** We can identify values that we share by learning each other's stories, especially 'choice points' in our life journeys. The key is asking "why."
- ☑ **Relationships grow out of exchanges of interests and resources.** Your resources can address my interests; my resources can address your interests. The key is identifying interests and resources. This means that relationships are driven as much by difference as by commonality. Our common interest may be as narrow as supporting each other in pursuit of our individual interest, provided they are not in conflict. Organizing relationships are not simply transactional. We're not



simply looking for someone to meet our “ask” at the end of a one-to-one meeting or house meeting. We’re looking for people to join with us in long-term learning, growth and action.

- ☑ **Relationships are created by commitment.** An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time. A commitment of time to the relationship gives it a future and, therefore, a past. And because we can all learn, grow, and change, the purposes that led us to form the relationship may change as well, offering possibilities for enriched exchange. In fact the relationship itself may become a valued resource – what Robert Putnam calls “social capital.”

- ☑ **Relationships involve constant attention and work.** When nurtured over time, relationships become an important source of continual learning and development for the individuals and communities that make up your campaign. They are also a great source for sustaining motivation and inspiration.

Building Intentional Relationships: *The One-to-One Meeting*

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

Attention – We have to get another person’s attention to conduct a one-on-one meeting. Don’t be “coy”. Be as up front as you can be about what your interest is in the meeting, but that first, you’d like it take a few moments to get acquainted.



Interest – There must be a purpose or a goal in setting up a one-on-one meeting. It could range from, “I’m starting a new network and thought you might be interested” to “I’m struggling with a problem and I think you could help” or “I know you have an interest in X so I’d like to discuss that with you.”

Exploration – Most of the one-on-one is devoted to exploration by asking probing questions to learn the other person’s values, interests, and resources and by sharing enough of your own values, interests, and resources that it can be a two-way street.

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

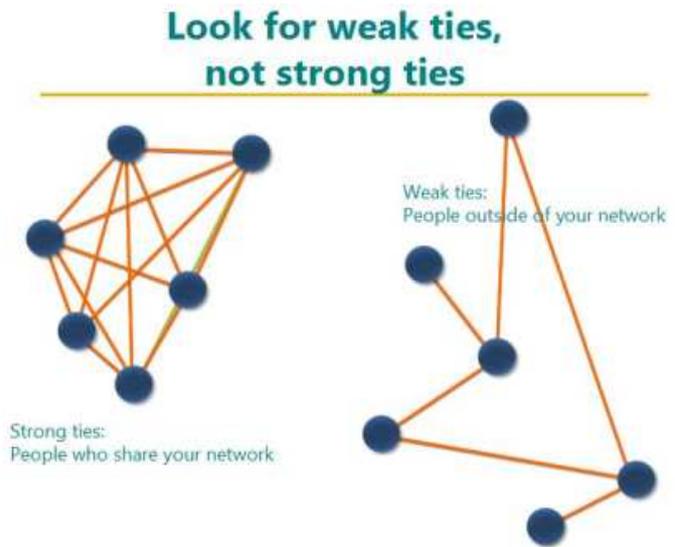
Commitment –A successful one on one meeting ends with a commitment, most likely to meet again. By scheduling a specific time for this meeting, you make it a real commitment. The goal of the one-on-one is not to get someone to make a pledge, to give money, to commit their vote as it is to commit to continuing the relationship.

Identifying and Recruiting and Leadership: Key Features

Qualities to look for in identifying

Leaders:

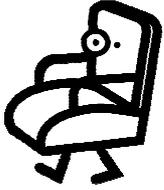
- Brings others to meetings
- Encourages participation
- Someone whom others tell you to find or meet
- “Doer’s”(community service leaders, school leaders, other “informal schools of leadership”)
- Good listening
- Curiosity/Imagination/Creativity
- Sense of Humor
- Courage—a hopeful heart
- Risk Taker—willing to try something new
- Has weak ties with you: brings diversity of resources and networks



Recruiting Leadership:

- Feel good about asking! This is about giving people a way to share what they’re good at
- Show your passion for the work
- Make choices based on evidence from your 1:1; not a hunch

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



BREAKOUT: The LDI “Speed Dating” 1:1 Exercise

PRACTICE BUILDING RELATIONSHIPS

Goals

- Practice the art of the 1-to-1 conversation by using probing questions to discern shared values based on learning each others stories, to identify each other’s interests, and to discover resources that could address those interests.
- Discern values, common interests, and common resources across teams

Agenda—TOTAL TIME: 35 min.

1.	Gather in a circle. Decide who will initiate the conversation and who will be the respondent. The initiator learns about why the other person has been called to do this work. Probe with “why?” questions to get to choice points and specific experiences that shaped her/his life. The initiator can shares his/her own story. Listen to the other’s story for the motivations and the resources s/he brings to the campaign (leadership skills, a following, action skills, etc.). Be specific. Use the worksheet on the following page as a resource.	10 min
2.	Find a new partner in your circle. If you initiated a conversation last time, you will now be the respondent. Have a 1:1 meeting	10 min
3.	Repeat again.	10 min
4.	On a piece of flipchart paper have a scribe capture the values, interests, resources, and commitments that people heard during the 1:1’s.	5 min

Listening During the 1:1: As you hear each other's stories, keep track of details using the following grid.
Possible starting questions:

What calls you to leadership in your church? What pain or challenge in your community moves you? Who is a person who has inspired you?

VALUES AND INTERESTS	RESOURCES	COMMITMENTS TO ONE ANOTHER



CREATING SHARED STRUCTURE: Building Strong Teams

What is our purpose and what are our norms and roles?



BUILDING LEADERSHIP TEAMS

Goals for this session:

- To develop an understanding of the core practices of successful leadership teams
- To practice those skills by developing a shared purpose, clarifying team roles and responsibilities, and creating norms and practices of coordination

Why do leadership teams matter?

Most effective leaders create teams to work with them and to lead with them. Take for example Moses, Aaron and Miriam in the story of Exodus, or Jesus and the twelve disciples in the New Testament, or Martin Luther King, Ralph Abernathy, Rosa Parks, Jo Ann Robinson and E D Nixon during the Montgomery Bus Boycott.

A leadership team offers a structured way to work together interdependently, each person taking leadership on during part of the team's activity. At their best leadership teams recognize and put to productive use the unique talents of the individuals who make up the team.

Team structures also help create strategic capacity—the ability to strategize creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. In the Obama campaign, the field structure created multiple layers of leadership teams to engage people creatively and strategically at all levels of the campaign. Each state had a state leadership team that coordinated regional leadership teams (of Regional Directors and Organizers), which coordinated local neighborhood leadership teams of volunteer leaders.

At every level the people on leadership teams had a clear mission with clear goals and the ability to strategize creatively together about how to carry out their mission and meet their goals. This structure created multiple points of entry for volunteers, and multiple opportunities to learn and to exercise leadership.

Leadership teams provide a foundation from which an organization can expand its reach. Once a team is formed, systems can be created to establish a rhythm of regular meetings, clear decisions and visible accountability, increasing the organization's effectiveness. An organization of 500 people is not accomplished by one person alone. It is built by finding people willing and able to commit to helping build it, and creating relationships and a solid structure from which it can be built.

So why don't people always work in teams?

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

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

Three measures of an effective team:

1. **OUTPUT (WORLD):** The success of your team in taking the action required to achieve its valued goals – winning the game, winning the campaign, putting on the play, etc.
2. **CAPACITY (TEAM):** Over time your team is learning how to work more effectively as a team, and developing more leadership.
3. **LEADERSHIP DEVELOPMENT (INDIVIDUAL):** Individuals who participate on your team learn and grow as a result of their participation.

Three conditions that make for a "real" team:

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

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

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

Three steps to launching an effective team: purpose, ground rules, and roles

You have a shared – and engaging purpose.

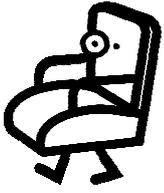
You are clear on what you have created your team to do (purpose), who you will be doing it with (constituency), and what kinds of activities your team will participate in. The work you have to do is readily understood, it's challenging, it matters and you know why it matters. Team members need to be able to articulate for themselves and others this "purpose".

You have created clear interdependent roles.

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

Your team has explicit ground rules.

Your team sets clear expectations for how to govern itself in your work together. How will you manage meetings, regular communication, decisions, and commitments? And, most importantly, how will you correct ground-rule violations so they remain real ground rules? Teams with explicit operating rules are more likely to achieve their goals. Some team norms are operational, such as how often will we meet? How will we share and store documents? Communicate with others outside the team? etc. Others address expectations for member interaction with each other. Initial norms guide your team in its early stages as members learn how to work together. Norms can be refined through regular group review of how well the team is doing.



TEAM BREAKOUT SESSION: BUILDING YOUR TEAM

Goal

The purpose of this exercise is to help you:

- (1) Develop your team purpose.
- (2) Identify the norms you will practice as a team.
- (3) Define your leadership roles. Then discuss the roles relative to the talents of those in your team.

Agenda

TOTAL TIME: 35 min.

1. Gather and review agenda. You will need a timekeeper, scribe, and notetaker for this session. 5 min
2. Review your team's **shared purpose** that you composed earlier in the month. 5 min
3. Decide on collaborative **norms** that will enable you to function with shared commitment. Use the worksheet that follows. Write on flipchart and capture in notes. 15 min
4. Determine team **roles**. Using the list of roles as a starting point, brainstorm what roles your team will need. What are the responsibilities of each role? What gifts are needed for each role? How can you best divide the roles based on individuals' gifts and interests. Write on flipchart and capture in notes. 10 min
5. If extra time, discuss key learning: What did you learn about how to structure and run a good team? What worked? What didn't?

Be prepared to present your team purpose , norms and roles during the debrief.



WORKSHEET: DEVELOPING SHARED PURPOSE

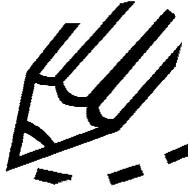
SHARED PURPOSE (5 minutes)

Most teams in preparation for the training wrote down a shared purpose. If you haven't already, come to a consensus with your team about your team's shared purpose (see sample sentence below). **Write your team's shared purpose on a piece of flipchart paper and be prepared to share your shared purpose during the debrief.**

Examples of a shared purpose sentence:

The purpose of the St. Peters LDI Team is to mobilize young people and churches in Springfield to secure funding from the city council to build a youth center. We will achieve this by hosting events, developing relationships with local and government leaders, and developing one another's leadership through coaching and listening.

Our team's shared purpose is to

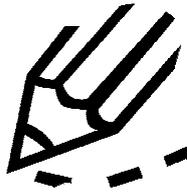


WORKSHEET:
DEVELOPING TEAM NORMS

TEAM NORMS/EXPECTATIONS (10 minutes)

Review the sample team norms below. Add, subtract or modify to create norms for your team. Be sure to include group norms on each theme below and how you will self correct if the norm is broken. (If you don't self correct, the new norm will be breaking the norms.)

<p>Discussion and Decision-making: <i>How we will discuss options and reach decisions as a team to ensure vigorous input and debate?</i></p>	
<p><u>Always Do</u> Engage in open, honest debate Ask open-ended questions Balance advocacy with inquiry **Consensus, voting, or delegating when making a decision?</p>	<p><u>Never Do</u> Engage in personal attacks Fail to listen to what others say Jump to conclusions</p>
<p>Meeting Management : <i>How will we manage meetings to respect each other's time?</i></p>	
<p><u>Always Do</u> Start on time; stay on time Be fully present throughout the meeting **Teams work best when you have a regular, reliable time to coordinate together. What will your team's regular meeting time and place be?</p>	<p><u>Never Do</u> Come to meetings unprepared Answer cell phones or do email</p>
<p>Accountability: <i>How we will delegate responsibilities for actions and activities? How will we follow through on commitments?</i></p>	
<p><u>Always Do</u> Clarify understanding Provide follow-up on action items Ask for/offer support when there is a need Weekly check-in</p>	<p><u>Never Do</u> Assume you have agreement Assume tasks are getting done Commit to a task that you know you won't do</p>
<p>How will you "self correct" if norms are not followed?</p>	



WORKSHEET: DEVELOPING TEAM ROLES

Understanding Team Roles (10 min.): Review the sample team roles below as an example of what roles might look like for your team.

- Are there roles that your team wants to add/subtract or combine?
- Brainstorm together what qualities would be a good fit for each role
- Team members volunteer for each role.

Note: For the team to be strong, all leaders should have to earn leadership by carrying out responsibilities relevant to the role they seek. Once the project has begun the team can evaluate if the roles fit.

Role	Responsibilities	You would be good for this role if you . . .	Interested Team member
Team Coordinator	Coordinate the work of the leadership team. Prepare for meetings, give support and coaching to the team. Liaison with LDI staff. Speaks once/month by phone with LDI coach.		
Volunteer Coordinator	Coordinate, recruit and manage your team's volunteers (training, deployment, and debriefing, evaluating work of volunteers).		
Chaplain	Plans and facilitates spiritual practices. Assesses the emotional needs of the team. May attend trainings with LDI Chaplain Katie Ernst.		
Communications/Messaging Coordinator	Coordinate earned media and local messaging with the statewide Core Team Communications Coordinator. Produce a monthly update to keep local supporters and volunteers informed and engaged in your campaign.		
Logistics Coordinator	Lead the team in creating a plan for team actions. Coordinate logistics for team actions. Help generate resources necessary.		
Public Narrative Coach	Listens and provides coaching to team members. Teaches and coaches volunteers on public narrative.		



**STRATEGY IN ORGANIZING:
Creating a Plan That Meets Goals and
Develops Leaders**

How do we creatively strategize?



STRATEGIZING IN ORGANIZING

Goals for this session:

- To understanding strategy in the organizing context
- To learn how to develop creative, dynamic strategy

The purpose of this session is to devise your team's strategy to achieve a successful campaign launch by early February. You will practice strategizing: turning the resources you have into what you need to get what you want. Or in other words, you will to turn the resources you have into the power you need to achieve a specific, measurable goal.

WHAT IS STRATEGY IN ORGANIZING?

Strategy in organizing is your plan for turning the resources you have into the power you need to get the change you want. Strategy involves:

- **DEFINING AND COMMITTING TO A GOAL:** Develop clear, measurable outcomes that allow you to know if you've won or lost, succeeded or come up short in achieving them.
- **TAKING STOCK OF RESOURCES:** Begin with the resources you have and brainstorm those you need in order to shift relations of power.
- **DEVISING FLEXIBLE TACTICS:** Tactics reflect your theory about how to creatively use the resources you have to build your power you need to meet your goal. You are constantly testing your theory by trying new tactics, evaluating and improving them over time.

CHARACTERISTICS OF GOOD STRATEGIZING

Strategy is motivated

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

Strategy is intentional

Strategy is a theory of how we can turn what we have (*resources*) into what we need (*power*) to get what we want (*achieving goals*). It is a hypothesis about how we can use certain tactics to achieve specific goals. What clear goal was Martin Luther King and the boycott leadership trying to achieve? How is that distinct from their overall vision? What clear, specific goals are we trying to achieve?

Strategy is creative

Challenging the status quo requires making up for our lack of resources by using the resources we do have intentionally, enabling creative resourcefulness. In the bus boycott the leadership turned the resources of their constituency (a simple bus fare) into power by mobilizing that resource collectively. Remember, power is nearly always dependent on the participation of the powerless. Disrupting that participation can get the attention of decision makers and shift the balance of power.

Strategy is a verb

Strategy is verb, something we do, not a noun (something we have). Strategizing is not about creating a "strategic plan" at the beginning of a campaign and implementing it. Rather, it is about constantly making opportunistic, but mindful, choices with regards to challenges and opportunities that emerge along the way – always with intentionality with respect to our goals.

Strategic Planning	Call to Action Strategy
Something we have Think your way into new acting – energy goes into the document We create, then implement a plan Time as a cycle	Something we do Act your way into new thinking – energy goes into actions We strategize as we implement Time as an arrow

Action is at the heart of strategizing. As Hirschhorn and May put it, we “act our way into new thinking” rather than “think our way into new acting.” As leaders, we commit ourselves and our resources to the course of action we believe likely to yield a desired outcome. At the same time, as we take action to move towards our goal, we remain ready to adapt to new opportunities and to learn from our successes and failures. Strategic action is not a single event, but a process or a loop continuing throughout the life of a project. We plan, we act, we evaluate the results of our action, we plan some more, we act further, etc. If we learn that our tactics aren’t helping us move closer to our goal, we devise new ones – firmness of goals and flexibility of means. Constructively managing the tension between commitment to a course of action and adaptation is one of the primary responsibilities of strategic leadership.

KEY QUESTIONS IN STRATEGIZING

1. What is the **VISION** (or the change you want to see)?
2. Who are the **ACTORS** involved? What are their **VALUES** and **INTERESTS**?
3. What are the **RESOURCES** that we can draw on within our constituency?
4. What is our **MEASURABLE GOAL**?
5. What **TACTICS** can we employ to turn our resources into power?
6. What is our **TIMELINE**?

(1) WHAT IS OUR VISION (OR THE CHANGE YOU WANT TO SEE)?

Our vision will articulate both a “nightmare” – a concrete, urgent need for change in moral (injustice) and specific terms – and will contrast this challenge with a “dream” – a source of hope, also articulated in moral (justice) and specific terms.

- What is the intolerable condition that we want to end or avoid?
- Why is it urgent now?
- What is at stake?
- What will happen if we don’t act?
- What could happen if we do?

For example:

Think of a community that will be positively impacted if your collective efforts are successful. Describe how their daily experience will be altered. How will their life be affected?

(2) WHO ARE THE ACTORS INVOLVED? WHAT ARE THEIR INTERESTS?

In organizing we mobilize people, not issues. Our teams are made up of the leaders who are central to our work, whose leadership we develop. Our constituencies are the people who are teams mobilize, and to whom we are accountable.

Who are we organizing? Individual citizens? Faith-based organizations? Are we targeting particular subgroups, such as mothers? How many will we target? Where are they located? How can we reach them?

Our strategy will ultimately be about how to influence the choices made by these potential allies, supporters, competition and opposition. Imagining them on a map quite literally helps us “map” the values, interests and resources at play. Who are they? By name? By organization? By subgroup? What do they value? What interests do we share? What interests conflict with ours? What resources do they have that we want? What challenges do they face? What resources do we have that they might want? Why might they join us?

Opposition. In pursuing our goals we may find ourselves in conflict with the values and interests of other individuals or organizations. Some hospitals, for example, may be anxious about a campaign that reduces services that generate income. Some insurers may oppose campaign outcomes that cut them out of a profit. How are you going to anticipate this opposition and design the campaign to overcome it?

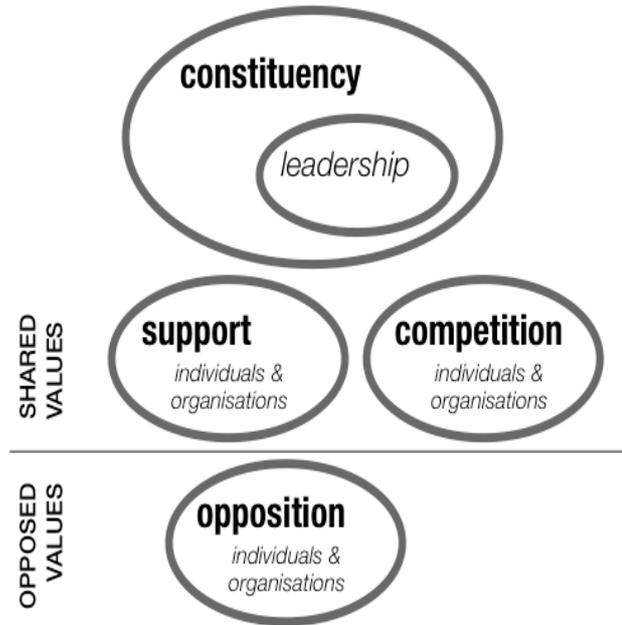
Supporters. There will be people whose interests are not directly or obviously affected by the campaign but who may find it in their interest to support it. For instance, other initiatives in your community or state may have interests aligned with the campaign and agree to provide resources.

Competition. There will be individuals and organizations with whom we may share some interests, but not others. For example, they may target the same constituency, or they may seek the same sources of support. They may face the same opposition but have a different vision and measurable outcome for their work. Another program may compete with you for the time and commitment of citizens; the Open School may compete with you for the time and commitment of nursing students. How can you turn your competition into your supporters or your constituency?

Our map of actors is not static. As you develop your strategy, consider how you will build capacity by turning supporters into allies and competitors into supporters. Is there a basis for developing an exchange of resources so you can make a commitment to one another? Does your map reveal anything new about whom you should recruit?

Who should we recruit?

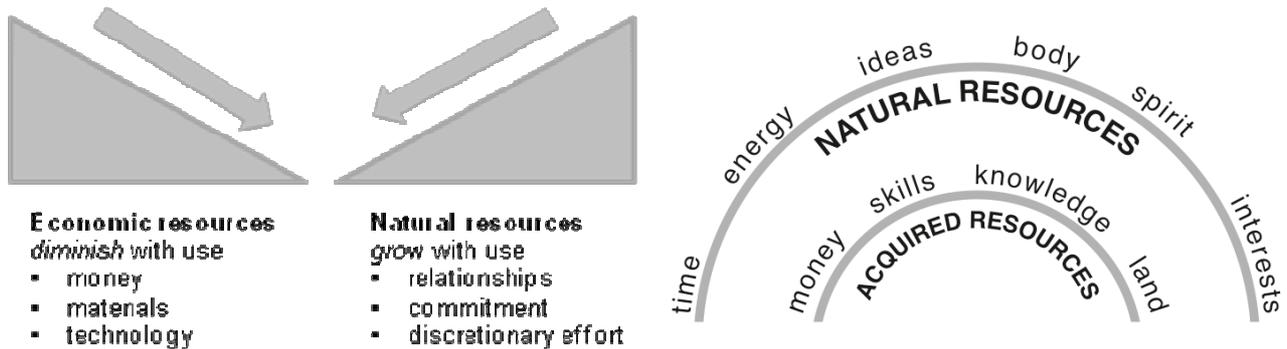
There is a tendency to think of leaders as the people who speak for a group, from behind a microphone, or the people who run institutions. But those are just the most visible forms of leadership. When recruiting leaders for organizing, look for other assets that a person brings.



- ***The best people to recruit are those who can bring others along.*** They are rooted in one or more of the constituencies you want to organize. You may choose to recruit individuals who can bring along other *individuals* or *informal networks* because of their deep networks of relationships in a community. You may look for people who can bring *organizations* along.
- ***Look for people with good relational skills.*** They should be good listeners, not just good talkers, and able to relate to a wide variety of people. ***Good leaders believe in people.*** They encourage them, respect them, and help them develop their own leadership skills.
- ***Look for people who are clear about their values and have a positive outlook toward tackling challenges.*** Be careful about naysayers, as they can dampen the spirits of others.
- ***Seek out those with a history of collaboration.*** Leaders need to be able to put their personal agendas and organizational identities aside and work for the good of the whole. One way to know if they can do that is to find out if they've done it before. Pay attention to whether they have been part of other group efforts – perhaps at church, work or school, or in a larger, more complex collaborative.
- ***Look for people who will share leadership with others.*** Again, probe to see if they've done it before. Pastors, physicians and other traditional authority figures often lack experience in sharing leadership and may fall back on top-down models to get things done. Those who have been part of voluntary organizations, such as PTAs, may have valuable experience in sharing responsibility. Organizing depends on shared leadership and responsibility. This has to be modeled from the top.
- ***Look for passion and commitment to the cause.*** Passion and commitment are central to motivating others and providing effective leadership in the face of uncertainty.
- ***Look for those who build consensus and accept compromise.*** Watch out for overly zealous people who don't listen and can't accept constraints. The ability to compromise is critical to team success.
- ***Look for people with resources:*** relationships, knowledge, moral, and financial resources. For "knowledge resources," look for people with an understanding of the problem you are trying to solve. For "moral resources," look to people who have widespread respect in their communities or among co-workers. For "relational resources," look for people who bring others along with them or whose relationships create political space for the campaign.
- ***Find people with a learning orientation, who are willing to take risks, learn from others and work outside their comfort zone.*** If the problem could be solved through conventional approaches, it would have been solved by now.

(3) WHAT ARE THE RESOURCES THAT WE CAN DRAW ON IN OUR CONSTITUENCY?

Strategy is based on the resources of our constituency. What unique resources do our constituencies have? Drawing on their resources collectively empowers our campaign to challenge the power dynamics that constrain the outcomes we seek.



As you develop your strategy and tactics, take time to make an inventory of the resources that your constituency has access to – either directly or indirectly. Drawing on constituency resources empowers the constituency to change power dynamics that created the problem in the first place.

- What resources are available to you in this room today?
- To what resources does your constituency have unique access? Time? Knowledge? Expertise? Credibility? Moral authority?
- What additional resources do you need? Who has access to them?

Challenging the status quo requires making up for your lack of resources by using the resources you do have intentionally. Developing a successful strategy, therefore, will require creativity and flexibility. It is through tactics that you give practical effect to your theory about how to use the resources you have creatively to build the power you need to achieve your purpose. You are constantly testing your theory by trying new tactics, evaluating them and improving them over time.

(4) TO WHAT MEASURABLE GOAL WILL WE COMMIT?

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

The art of choosing strategic goals is the art of turning problems into solutions. It's the art of asking ourselves: "What concrete solutions could we create in the world that would begin to solve the challenges we face?" No one strategic objective can solve everything, so there is no use waiting or hoping for it. Focused, winning calls to action that create real, tangible change in the world have the discipline to choose a single objective and focus all resources strategically on achieving it.

Your choice of strategic objective will depend on your assumptions and analysis about why things are the way they are and what action needs to be implemented in order to change them, i.e. your theory of change. All of us make assumptions about how change happens, but we can strategize more effectively if we make our assumptions explicit.

When developing our campaign, we ask ourselves why the change we are seeking has not happened

already and what it would take to create effective collaboration to address the challenge we're facing:

- If the need is so urgent, why hasn't it been addressed already? If it has, why did previous efforts fail?
- Who holds the resources to meet the challenges, i.e. who are our commitment groups? Who specifically?
- What resources does each group have to take action on the change we want?
- Why haven't they acted? Or have they, but not known how to act effectively?
- What are the interests of our constituencies? What do they want?
- How can we use the resources of our constituencies groups to achieve change?

(5) WHAT TACTICS WILL WE USE TO TURN OUR RESOURCES INTO THE POWER WE NEED TO ACHIEVE OUR GOAL?

Tactics are the specific activities through which we implement strategy. Tactics are targeted in specific ways and carried out at specific times in order to focus limited resources on doing what is likely to yield the greatest result.

The most obvious tactics are not always the most effective tactics. For instance, if we are looking to recruit five people to a leadership team, we could give our campaign narrative at a large event, circulate a sign-up sheet and follow up with one-to-ones. But would that necessarily be the most effective tactic given the number and the nature of the people we are trying to recruit? We may want to visit a meeting with fewer participants and ask them to share their motivations, interests and perspective on the challenge we face. We could ask influential community members to recommend 2-3 people and conduct one-to-ones with them.

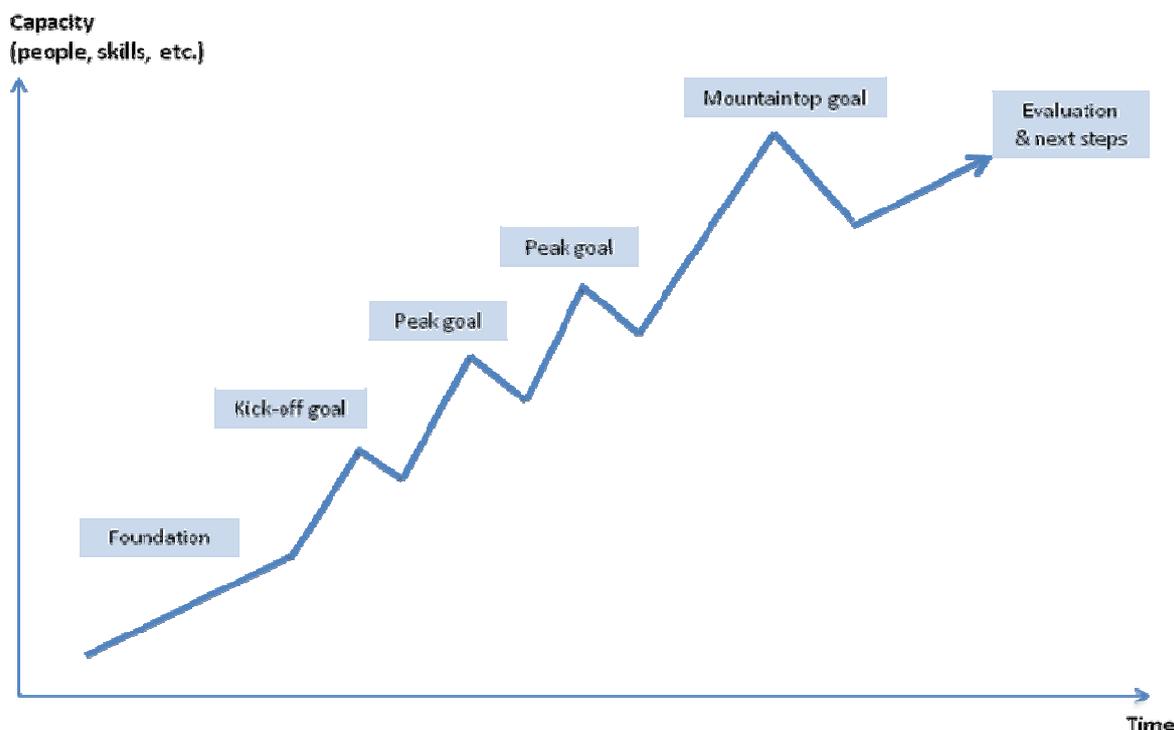
Designing tactics is a collaborative and creative process. Ensuring that we have a diversity of perspectives and experiences on our teams will help to maximise our creativity and capacity. The deliberation process should also allow time for genuine brainstorming – open, creative, no-idea-too-crazy – before decisions are made.

Once we've developed a range of possible tactics we will need to decide which ones to pursue. Some key criteria for us to consider when making our choice include:

- Is it consistent with your values and the goal you are hoping to achieve?
- Will it develop leadership?
- Will it develop organizational and team capacity?
- Does it use your resources creatively?
- Is it motivational, fun and simple?
- Does it build on your strengths and your opposition's weakness?
- Will it help to broaden your constituency beyond the usual suspects?

(6) WHAT IS OUR TIMELINE?

How will we “chunk out” our measurable goal over time and space? What are the dates and benchmarks? How will we construct our campaign so we are building capacity and developing leadership over time?



A campaign is a way to structure time. It unfolds over time with a rhythm that slowly builds a foundation, gathers gradual momentum with preliminary peaks, culminates in a climax when the call to action is won or lost, and then achieves resolution.

In organizing we assume that we begin a campaign with far fewer resources than we will need to tip the balance of power and achieve our goal. Growing our capacity (people, money, skills, etc.) is critical for success. Most campaigns therefore devote an initial chunk of time to recruiting enough volunteers along the snowflake to create the “critical mass” that will allow them to reach out to get supporters on a large enough scale. This is what builds momentum. Like a snowball, each success contributes resources and capacity, which makes the next success more achievable. As we map our campaign we identify milestones for when we will have created enough new capacity and developed enough power to undertake activities that we couldn’t before.

Reaching a threshold that gives us new capacity is a “peak.” A peak isn’t simply a milestone on a strategic plan – it is a peak because it is a threshold that we are able to cross as a result of mobilizing the most resources we can to achieve it. Is it an unsustainable peak of effort – once we cross that peak, we can relax our effort briefly, assess, and then deploy our new resources to reach our next peak. An organizing strategy is necessarily built around a series of peaks, culminating in a final “mountaintop” peak when we have either achieved our goal or not.

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

Creative Tactics from the Past

It's important to remember that creative use of resources depends on the particular context we find ourselves in. We must look around and try to understand the current power relationships and develop tactics that allow us to shift those relationships of power. These examples from the past are not likely to be repeated, as today's context is very different. Rather, their creative use of resources can spark our own creative thinking, just like Frida Kahlo looked to Diego Rivera for inspiration and then went out and did her own work.

- California Farm Worker *Peregrinación*, 1966: 51 members of the National Farm Workers Association (NFWA) - precursor to the United Farm Workers (UFW) – undertake a 300-mile march from Delano to Sacramento to bring statewide and national attention to their struggle against Schenley Industries, a national liquor distributor and Delano grape grower with whom the NFWA had been involved in a protracted local dispute. The march, planned to coincide with the Catholic commemoration of Lent, brought renewed energy to a hard fought campaign. The thousands of supporters who showed their support to the marchers made Schenley reconsider their resistance to negotiating with the NFWA. Three days before arriving in Sacramento, Schenley agreed to terms on the first real union contract in California farm workers history. The movement was launched.
- Flood the Store (Saul Alinsky): To protest the discriminatory employment policies of a department store, organizers *threatened* to bus 3,000 Black customers in their Sunday best to the store and fill it. The plan was for Black customers to keep the clerks busy by asking detailed questions about the merchandise, then an hour before closing, they'd buy everything in sight and ask it to be shipped Cash On Delivery. Upon delivery, they'd refuse it. Because it was credible, the threat itself proved enough to change the store's hiring practices. An important lesson: the threat of a tactic is often more powerful than the tactic itself.
- Bathroom Sit-In: Woodlawn Association (Saul Alinsky) In Chicago, to "persuade" authorities to keep their commitments to investment in the Woodlawn ghetto, community leaders arranged for a sit-in in the airport's restrooms. Protesters planned to come with books and newspapers, occupy the stalls and crowd the urinals, and stay there for hours on end. Again, the *threat* of this tactic, which at the time was completely legal, forced the political establishment to re-commit to the investment in Woodlawn.
- Montgomery Bus Boycott: Civil rights leaders turned a small individual resource (bus fare) into powerful collective capacity by asking people to withhold bus fares and stay off the bus. In a situation in which all the power seemed to be on the side of elite whites, the African-American community found ways to turn their individual powerlessness into collective power and eventually shifted the tide in a landmark campaign for equal rights.



TEAM BREAKOUT SESSION: STRATEGY

Materials: 5 sheets of flipchart paper, post-it notes.

GOALS

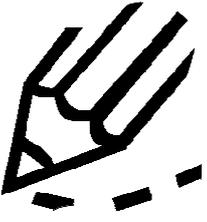
- Develop **Vision, Map of Actors and Resources**
- Develop a **Strategic Goal** and **Organizing Sentence**.
- Devise the **Tactics** your constituency can use to achieve their **Strategic Goal**.
- Decide how you will sequence those **Tactics into a Timeline and Campaign Chart**.

TIME: 65 minutes

MATERIALS: 5 sheets of flipchart paper each, post-it notes, map of actors (if already drawn up)

AGENDA:

1. Gather in your team. Review agenda, and clarify concepts. Choose a timekeeper, notetaker, scribe. 3 min
2. Flipchart 1: **Vision:** Given your team's shared purpose. What is the change you want to see in the world? 15 min
3. Flipchart 2: Create or review your **Map of Actors and Resources**. 15 min
4. Flipchart 3: Develop your **Strategic Goal** based on the criteria listed in the worksheet on the next page. Use your **Strategic Goal** to develop your **Organizing Sentence**. 15 min
5. Flipchart 4: Brainstorm **Tactics** and create a **Campaign Timeline** using the worksheet that follows. 15 min
6. Choose one person to present the following in a 2-minute presentation: your team's campaign chart with at least 3 tactics. 2 min



WORKSHEET: DEVELOPING A GOAL, TIMELINE AND TACTICS

1. VISION: What is the change you want to see? (15 min)

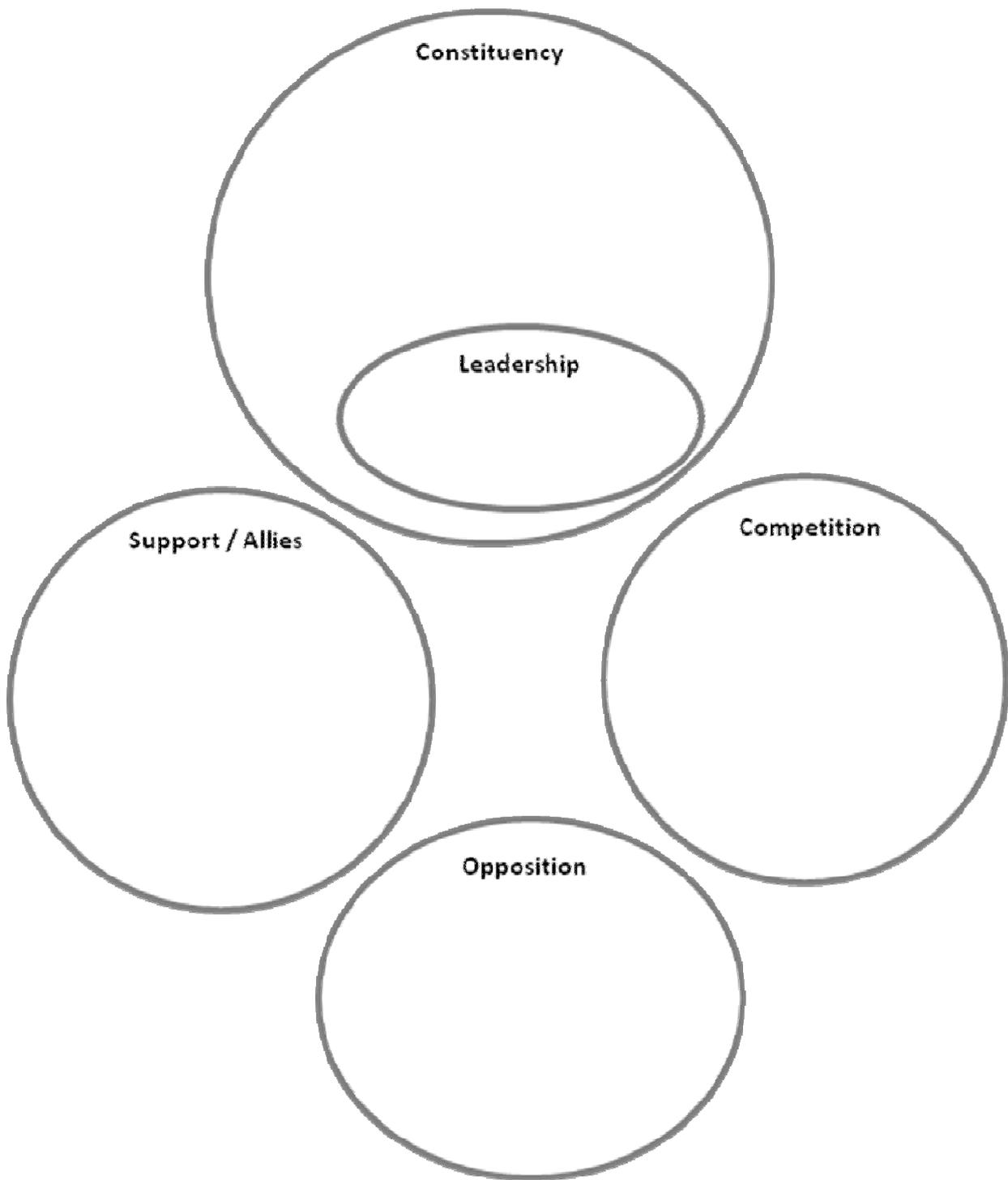
What change do you want, what is your dream? Visualize a different future by creatively using your resources – draw a picture, tell a story, imagine what a member of your constituency experiences (sees, touches, hears, tastes, says) in the new world. Is your team seeing the same picture? Write or draw this on a piece of newsprint.

2. DRAW MAP OF ACTORS AND THEIR RESOURCES

Review or create your resources and actors map (15 min):

Using the worksheet on the next page, draw or *review* your map of actors. What are their names, what organizations do they work in or lead in, what titles or roles do they have? What specific decision-making power or resources do they have that you need? Put yourself in their shoes – what are their interests?

If you do not already have a map of actors, on post-it notes, brainstorm as a group each of the actors. Write them on post-it notes and have the scribe put them in the appropriate category (constituency, support, etc.) on the chart. As a group, name each of the actors' resources and interests and add this information to the post-it note. The note taker can capture this information on the following page for future reference.



KEEP IN MIND WHEN MAPPING ACTORS:

- What are the interests of each actor?
- What are their resources?
- Who do you want to recruit?
- Who do you want to target?

3. STRATEGIC GOAL (15)

Review criteria for a good strategic goal:

Is it SMARTT (Specific, Measurable, Attainable, Realistic, Resource-based and Time-Bound)?

Brainstorm and Decide on a Strategic Goal

Keep these criteria in mind when brainstorming your Strategic Goal. What concrete outcome will you aim to achieve that will help your constituents get what they want? First openly brainstorm goals and build upon each idea. You can write ideas on flipchart paper.

Use the criteria above to evaluate the ideas, and make a decision.

Compose an organizing sentence based on your work in this session

“I am organizing _____ (WHO: constituency and leadership)

to do _____ (WHAT: strategic goal) Is it measurable?

by _____ (WHEN: timeline)

in order to _____ (WHY: motivating vision).”

2. Tactics and Timeline

Develop Your Tactics (8 min)

On what resources can you draw?

To what specific resources do you have unique access (maybe ones that you give away without thinking about it every day)? What resources are in this room today? Consider the resources identified in your one-to-one meetings. Write on newsprint.



Brainstorm as many tactics as you can on a flipchart paper as a team. Your tactics should be based on your resources. How will you organize your constituency’s resources to create the change they want? Good tactics are based in the culture and experience of your people and reflect your values.

What tactics will you use turn these resources into power?

After brainstorming, evaluate the tactics according to the criteria below (and any other you would like to add); select the ones you believe will yield the desired outcome; then think about how you can make them more effective, resourceful and liable to build capacity and develop leadership.

- **Effectiveness:** will your tactics enable you to achieve your goal?
- **Resourcefulness:** do your tactics make creative use of your unique resources?
- **Capacity:** will your tactics enable you to build greater capacity in your organisation?
- **Leadership:** do your tactics create opportunities for leadership development?

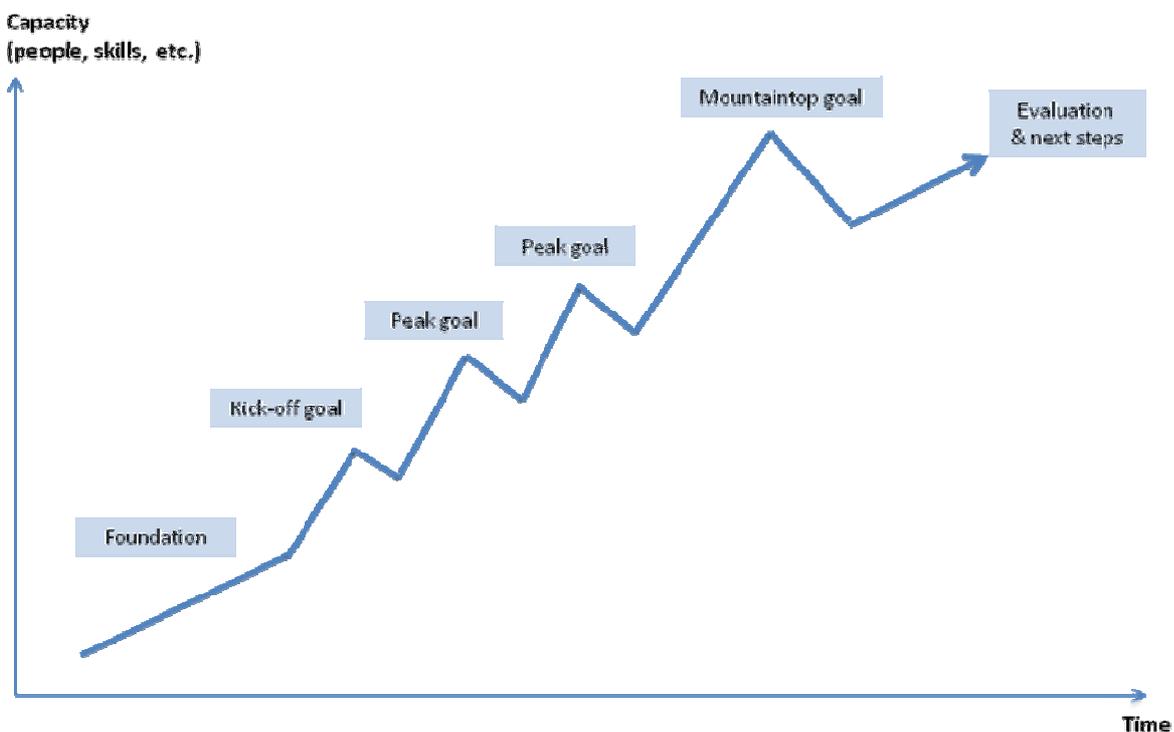
Hint: Strategy requires choosing. A laundry list of "what we are going to try" is not a strategy!

Decide on the top three tactics using the criteria above.

Step 2: Sequence Tactics into a Timeline (7 min)

For each tactic, determine a peak – what would it look like to achieve it? A peak is typically an event or action with your constituency that shows all of the capacity that's been generated since the last peak.

Working backward from your strategic goal, sequence your peaks on a timeline on a campaign chart. Each peak should build on what went before, culminating in your strategic goal. Figure out the outcome you want from each peak (for example, how many new people sign up or how many people participate in a march). Make sure to include the key date and the benchmark goal you will have reached at each peak. Use newsprint provided.



If you have time, make a list of the things that need to get done in the next few weeks. Make sure that the next steps are assigned by the roles previously created. Each next step should have a date and team member assigned to it. When possible, delegate goals rather than tasks, i.e. the goal “recruit 5 volunteers” leaves more room for creativity than “email the team list to recruit people.”

Team Member	Next step	By when?
Duncan	Create 1:1 list and delegate 1:1's to the rest of team	2/5
Arrington	Secure location for 3/1 event and email team with the information	2/5
Jason	Recruit 5 volunteers to help with worship	2/10
Ella	1:1 meeting with school principal	2/15



PUBLIC NARRATIVE:
Linking stories of SELF, US and NOW

How do we invite others to join us in collective action?



LINKING SELF, US AND NOW

Goals for this session: Get **commitments** from people to join you in action by linking your story of self, us and now.

Tying Together all of the Pieces into a Successful Public Narrative

If I am not for myself, who will be for me?

When I am only for myself, what am I?

If not now, when? —Hillel, 1st century Jerusalem sage



Public Narrative

As Rabbi Hillel’s powerful words suggest, to stand for yourself is the first step, but insufficient on its own. You must also find or create a community to stand with, and that community must begin acting now. To combine the stories of self, us and now, you have to find the link between why you are called to this mission, why we as a community are called to this mission, and what our mission calls on us to do now.

That linking may require you to continually rethink the stories of self, us, and now that you are working on.

Storytelling is a dynamic, non-linear process.

Each time you tell your story you will adapt it – to make yourself clearer, to adjust to a different audience, to locate yourself in a different context. As you develop a story of us, you may find you want to alter your story of self, especially as you begin to see the relationship between the two more clearly. Similarly, as you develop a story of now, you may find it affects what went before. And, as you go back to reconsider what went before, you may find it alters your story of now.

Storytelling takes practice.

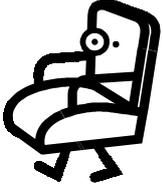
Our goal is not to leave with a final “script” of your public narrative that you will use over and over again. The goal is to help you learn a process by which you can generate your narrative over and over and over again, when, where, and how you need to in order to motivate yourself and others to specific, strategic action.

By telling a “*story of us*” you can communicate values that can inspire others to act in concert by identifying with each other – not only with you.

Just as with a story of self, key choice points in the life of a community – its founding, crises it faced, or other events that everyone remembers—are the moments that express the values that it shares. Consider stories of experiences that members of your group have shared, especially those that held similar meaning for all of you. The key is to focus on telling a specific story about specific people at a specific time that can remind everyone – or call to everyone’s attention – values that you share against which what is going on in the world can be measured. Telling a good story of us requires the courage of empathy – to consider the experience of others deeply enough to take a chance of articulating that experience.

By telling a “*story of now*” you can communicate an urgent challenge we are called upon to face, the hope that we can face it, and choices we must make to act.

A story of now requires telling stories that bring the urgency of the challenge you face alive – urgent because of a need for change that cannot be denied, urgent because of a moment of opportunity to make change that may not return. At the intersection of the urgency of challenge and the promise of hope is a choice that must be made – to act, or not to act, to act in this way, or in that. Telling a good story of now requires the courage of imagination, or as Walter Brueggemann named it, a prophetic imagination, in which you call attention both to the pain of the world and also to the possibility for a better future.



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

GOALS

- Learn how integrate your stories of self / us / now into a public narrative
- Ask for commitments by articulating a specific choice point for others to make

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

AGENDA

TOTAL TIME: 50 min.

1. Gather in your team. Nominate one person to be a **timekeeper**. 5 min.
2. Take some time as individuals to **silently develop your "Public Narrative."** 10 min.
Use the worksheet that follows.
3. Gather in your **small group to practice** your public narrative. **Practice telling your public narrative for 3 minutes with 2 minutes feedback.** 35 min.
Be sure that you end by **asking for a clear commitment** that is rooted in your team's project and your strategy.

Each person has 3 minutes to tell his/her story and 2 minutes for feedback.
Adjust the time accordingly depending on the size of your team.



WORKSHEET:
LINK SELF / US / NOW & ASK FOR COMMITMENT

SELF	US	NOW
What experiences and values call you to take leadership?	What values and experiences do you share with the people you are speaking to?	Why is it urgent to find ways to support one another now? What is your strategy to overcome the challenges? What is the first step that each person can take with you?
		* START HERE and be sure to ask for a clear commitment!



COACHING TIPS: PUBLIC NARRATIVE

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

DO coach each other on the following points:

1. **THE CHALLENGE:** What is the specific challenge we face now? Did the storyteller paint a vivid and urgent picture of it? What details might make it even more vivid and urgent?
“The challenge wasn’t urgent enough. Why not mention _____?”
2. **THE OUTCOME:** What is the specific outcome if we act together? Is there a clear and hopeful vision of how the future can be different if we act now?
“The outcome could be even more hopeful if you described _____.”
3. **THE CHOICE:** Is there a clear choice that we are being asked to make in response to the challenge? How did the choice make you feel? (Hopeful?)
“What exactly are you asking us to do? When should we do it? Where?”
4. **VALUES:** What values do you share with the storyteller? Does the story of now appeal to those values?
“Instead of telling us to care, it would be more effective if you showed us the choice to be made by illustrating the way in which you value _____.”
5. **DETAILS:** Were there sections of the story that had especially vivid details or images (e.g. sights, sounds, smells, or emotions)?
“The image of _____ really helped me feel what you were feeling.”
“Try telling more details about _____ so we can relate to this shared experience.”
6. **INTERWEAVING SELF, US AND NOW:** Did the story of self and the story of us relate to the story of now? If so, what was the common thread? If not, what thread could the storyteller use to rethink the connections between self, us and now?

Record Feedback/Comments from Your Team Members Here:

Coaching Your Team's Public Narrative

As you hear each other's public narratives, keeping track of the details of each person's story will help you to provide feedback and remember details about people on your team later. Use the grid below to track your team's public narratives.

NAME	VALUES	SELF	US	NOW

EVALUATION

1) What are your key learnings from this training?

2) What facilitated your learning?

3) What would you change for next time?

4) How do you feel about starting your project?

5) In what ways did times of worship/prayer support