Direct Action Community Organizing
Training Sessions and Exercises Guide

Prepared for the Community Learning Partnership by Michael Jacoby Brown

Note: This training guide is designed to aid trainers and teachers in preparing and leading training sessions on community organizing, especially in the classic Alinsky tradition. It is built around day-long sessions, with shorter sections within these day-long sessions. Many sections of this guide may be helpful to community college and university instructors, especially as they focus on basic concepts and skill-building workshops.

Introductory Session:

Goals:
● To review the goals of the class, including forecasting what students will gain in knowledge, skills and understanding and why that’s relevant to their lives
● To enable students to introduce themselves and begin to know others
● To begin exploring issues of self and community, culture, gender and class as background for exploring issues of social change
● To familiarize students with the key concepts and tactics of Alinsky-style direct action organizing and, briefly, contrast it with other strategies for social change

Different strategies for social change

Techniques: Lecture, Q and A, group discussion

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1 Michael Jacoby Brown is an experienced organizer and trainer in the classic Alinsky tradition. He is also the author of Building Powerful Community Organizations. He prepared this training guide for CLP in 2008. CLP Senior Advisor Andy Mott added some information in 2016, especially to clarify what this guide does and doesn’t cover.

2 With its focus exclusively on classic Alinsky community organizing, this section does not address the relationship between culture/ethnicity and community organizing. While some of its concepts and tactics are relevant to different overall strategies of social change, this paper does not include some of the most important strategies for bringing about social change. In particular, it does not include movement-building (like the civil rights and Black Lives Matter movements), political revolution and other violent means, legislative action, class actions and other litigation strategies,
Guidelines:
This session begins with the most basic theories of how social change occurs and looks at various theories or strategies of social change, with an emphasis on the classic Alinsky style of direct action community organizing.

Readings:
Bobo: pp 6 – 13, pp. 34-39
Trapp. pp. 8-11
Kahn, pp. 274-276
Minieri, pp. 23-29, pp 282-284
Brown, pp. 6-9, 123-124, 263-311, 324-334

Contrasting direct action community organizing with other strategies for social change

Time: 60 minutes
Technique: Lecture, with drawing on flip charts to illustrate strategies of social change

Content:
Explore the assumptions about the ability and potential of people in the various strategies. In delivering services, for example, an assumption is that people have needs and someone, (the service provider) can fill them. Advocacy assumes the client cannot represent him/herself and someone else (a professional) must speak for her.

Get the students to recognize the implicit assumptions of each strategy.

What does each strategy imply about the ability of people to achieve power, self-respect and personal development?

Point out that movement-building is aimed at building a groundswell of public action on a major social issue, with less emphasis on building a permanent organization.

- Movements often are sparked by a dramatic event which inspires growing numbers of people to act.
- Electoral strategies involve getting large numbers of people motivated to register to vote, to actually vote in critical elections, and to influence who wins elections.
- Litigation strategies involve the filing of lawsuits, especially class actions, to bring about major changes in the law, its interpretation and enforcement.

Point out that “organizing” strategies develop ongoing organizations with power which people can use on issues over the long haul. We assume that there will always be other problems that come up and the community organization will always be needed. With an organizing strategy, the organization will always be there. The relationships, structure, communication, leadership, etc will be available and ready to go. They won't have to be re-invented.

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3 This exercise clarifying the differences among strategies for change should be expanded to include drawings depicting such other strategies as movement-building, legislative action, class actions and other litigation strategies, voter registration and education, and electoral political strategies.
It is also worthwhile to note that elites, (those with wealth and power) have on-going organizations
to represent their interests (the oil lobby, the chamber of commerce, the corn growers lobby, etc.)
They all have well-funded professional organizations to represent their interests in Washington and
in State Capitols.

**Technique:** Drawing on flip charts to illustrate various strategies of social change
Draw the following charts, with a stick figure and a person served to illustrate the strategies of
social change.

**Movement- Building**

**Political Revolution and Other Violent Means (in US history and elsewhere in the
world in the past and present)**

**Class Actions and Other Litigation**

**Voter Registration, Education, and Turnout**

**Electoral Political Strategies**

**Direct Services:** Stick figure handing a “client” a “fish”. The point to make is that the server
gives something to someone in need. Ask for example of such “service” organizations. (homeless
shelter, food pantry, etc.)

**Community Development:** Show stick figure building affordable housing and creating jobs.

**Advocacy:** Stick figure, with a large mouth, speaking on behalf of the client. Put a “golden
dome” or other symbol of authority in the background. (Ask for examples: lawyer, food stamp or
welfare advocate, politician or ward alderman, etc.)

**Mobilizing:** Draw stick figures with many people with picket signs. (ask for examples; march on
Washington, vigils, rallies, marches, etc.) Make the point that these are temporary. Frequently no
sign in list. Power, if the mobilization has any, comes from demonstrating the feelings or interests
of those assembled.

**Organizing:** Show stick figure (with back toward students) and many other stick figures within a
rectangular frame (with dark magic marker) indicating that his is a bounded group. You can show
some people outside the boundary. They are non-members, indicating that people have to do
certain things (pay dues, agree to group norms, etc.) to become members.
Label some attributes of the strategy of organizing: The organization has members, money, dues,
structure, by-laws, accountable leaders, clear membership guidelines and responsibilities, and lasts
thru thru time. Indicate that the role of the organizer (in the stick figure) is to 'BUILD THE
ORGANIZATION AND DEVELOP LEADERS and the members). This is distinct from the other
strategies of social change.
This theory of social change believes that an on-going organization is needed to give voice and power to the people in the organization. Emphasize this element of the on-going organization as the strategy of social change, since this point is often missed. Ask for examples of this strategy, of on-going powerful organizations: (NAACP, unions, Abortion Rights Action League, Right to Life Committee, National Rifle Association, etc.) As opposed to the other strategies, this strategy primarily involves building the organization itself, and assumes that powerful organizations of people are necessary for social change. The actions and tactics of the organization all lead toward this end: building the power of the organization.

Organizing Tactics:

Time: 15 minutes
Technique: Lecture and Q and A

Content: Definition of tactics:

(See Bobo and Minieri readings especially: Bobo, 34-39, and Minieri, pp. 282-284)
Emphasize that no tactic is useful all the time. (Bobo, et al also makes this clear.) Only use a tactic when it can be effective in the context of your goal and your power relative to the power of the authority you are negotiating with. Some groups get comfortable with a tactic (e.g. picketing) and do it over and over, without reflecting on its effectiveness. (See reflection section, above). Depending on the experience of the group, ask for example of this tendency.

Some guided questions:

What do you think of the “action” (Brown, p. 305-306) of the affordable housing advocates at the City Council hearing?

Why do you think they did what they did? (What was their implicit “theory of action?”)

Is there a time when being right is more important than winning? If you think so, supply an example.

You might also list other tactics (boycotts, petition drives, candlelight vigils, press conferences, educational forums, rallies, face to face negotiations, marches, accountability sessions, etc.) and explore under what conditions such a tactic might be effective.

What do you think of the tactics Shel Trapp mentions on pp., 9-10? Going to the church and reading the 10 Commandments to the landlord and the congregants? Blocking traffic with the wheelchairs?

If you support them, why?

Were they effective? Why?

Combination of tactics:
Story: In Salem, MA a low income rental building of about 20 units was about to be sold after the owner had defaulted on his mortgage. The auction was to be held outside the building and the only bidders were some developers who wanted to turn the development into higher rent housing, which would have resulted in the displacement of all the tenants: mostly Latino families.

The local CDC organized local families and children to surround the building where the auction was to take place. It was a hot summer day. The brought a clown to entertain the children and shouted so loud that the auctioneer, standing at the top of a step ladder, could hardly be heard. The bidders looked around at the scene and were scared off by the turn out of the community.

Eventually, the Community Development Corporation was able to negotiate with the bank that held the mortgage to buy the building and retain it as affordable housing. They then went on to make sure that all the people in that neighborhood were registered to vote. The voter registration drive eventually led to the election of the city's first Latino city councilor.

This was a campaign that involved a variety of strategies and tactics: direct action, community development and electoral politics.
Day Two – Some Basics on Organizing

Listening, Choosing Issues, Understanding “Problems” and “Issues” as community organizers define them, and Understanding the Root Causes of Problems, and How Community Organizers Solve Problems

Goals:

● To understand the function and importance of listening to members and potential members in building an organization
● To understand the difference between “problems” and “issues” as defined in community organizing
● To understand the importance of choosing “issues” as opposed to focusing on “problems” when building a community organization
● To develop skill in choosing issues for a community organization
● To understand the theory of social change underlying community organizing
● To understand the root causes of problems and how we approach possibly solving them
● To understand the elements of developing an issue campaign

Time: Day Long workshop: 9 to 4 pm.

Readings:

Brown, Michael Jacoby, Building Powerful Community Organizations pp. 6-8, 72-74, 81-84, 327-332
Bobo, Kim, et al., Organizing for Social Change, pp. 14 to 18
Joan Minieri and Paul Getsos:, Tools for Radical Democracy, pp. 129-136
Kahn, Si, Organizing, Revised edition, 1991, p. 8, pp. 79-87,
Trapp, Shel, Dynamics of Organizing, pp. 25-33. “Shopping Carts to School Buses” (self-published, Shel Trapp, 5621 N. Luna Avenue, Chicago, IL 60654, satrapp@earthlink.net

Section 1: Reflections and current feelings:
Time 30 minutes:
Note: I recommend this session every day, in day-long sessions, especially if students are returning after several days’ absence.

Content: To bring students into the present and gather any learning or questions about the last session.

Training Technique: Questions and answers, group discussion.

Student activity: active listening, participation, reflection upon their learnings from the last session, and their thoughts and feelings at this moment.

Training tools:
Flip chart: to record any questions or learnings. If questions care not adequately addressed in the time allotted, develop another flip chart labeled “PARKING LOT” Keep this flip chart during the day where all can see it and return to at the end of the day, if time allows, or another day if no time is possible on this day.
**Theory underlying process and technique:**

Students need time to reflect upon what they have learned and to ask questions to internalize their understanding. Voicing their questions helps to do this. Allowing time for them to express their thoughts and feelings brings them more fully into the learning environment for the day.

The theory behind using the Parking Lot flip chart is that the students’ questions are the most important guide for providing the learning they need. These questions guide the teacher to better understand their point of view, what they don't understand and want to learn. Providing the Parking Lot demonstrates respect for students' questions and makes the content driven, at least in party, by students' questions and concerns.

**Section 2: Problems and Issues:**
**Time Allotted:** 1 hour

**Learning Goals:**
- To define “problems” and “issues” and clarify the difference between them, as community organizers define and understand them
- To clarify the criteria for choosing an issue
- To introduce the function of issues in organizing and building powerful organizations.

**Training Technique:**
Lecture with questions, answers and dialog among students

**Lecture content:**
What follows is a general guide. Please tailor to your own situation.
Start by asking the group for problems they face, or people they know face.

**Flip chart.** Draw a vertical line down the center of the flip chart. On the left side at the top, write: “Problems” and on the right side at the top of the line write “Issues”

Write down the problems they mention in the left-hand column. It will likely be a long list, often including: “poverty, violence, high cost of housing, lack of good jobs, poor schools, traffic, drugs, poor public transportation, over-crowding pollution, global warming, apathy, etc..”

Write down all that come at you. When the paper is full, you may remark, “There is certainly no shortage of problems!”

Then, ask: “But what can you really do about “poverty?” Or “violence?” Or any of the other problems? Can you really solve them? How can you get a handle on them?

Explain that “poverty” and “violence” are abstract words.

Organizers understand that you can’t solve “poverty” as a whole, but you can do something about it by taking these problems and turning them into “issues” – something you can actually win. So
organizers try to take these larger, often abstract “problems” and turn them into something that you can actually do something about. We turn them into “issues.”

We do this because we want to improve people’s lives. We may not be able to solve the problem of “poverty” but can we pass legislation that raises the minimum wage (as many cities like Seattle have done to $15 an hour). That brings real money home to thousands of people.

Poverty is a “problem.” Passing a higher minimum wage bill (or come up with your own local example) is an “issue.” It is something a group might achieve that will do something to alleviate poverty (the “problem.”)

Then take another example, one of the “problems” that they identified and you wrote on the flip chart. Ask them come up with an “issue” you could possibly win that would actually do something about the problem. Work with them so they understand how to break abstract “problems” into concrete “issues.”

Now move to what issues should a community organization work on? There are so many problems, we could attack many issues. How do we choose which issues? On what basis or criteria?

**Write in big letters on a flip chart (using black ink, in large bold letters)**

“**Criteria for choosing an issue:**

- Winnable
- Specific
- Deeply and Widely Felt”

Explain: When you are moving from “problems” to issues” you want to choose issues that are “winnable, specific, and deeply and widely felt.”

The explain: by **winnable**, we mean something that, with the people and the power we have, we are likely to actually win. Perhaps not right now, but in some reasonable length of time.

It also has to be **specific.** We need to know exactly what we are asking for. You can refer to the reading: (in BPCO, pp. 81-82. the Camfield Gardens case study), where the tenants needed to be very specific about what they wanted, so their organization would not be torn apart by bickering over the specifics of what they wanted to win. As we will explain later in more detail, the overall goal of winning these issues is to build a long lasting, powerful organization, as well as to win the specific improvement.

These two goals are related. Organizations that win improvements tend to attract more members, which, in turn, strengthens the organization.

Explain: **“deeply and widely felt”**, meaning that lots of people care deeply about this issue. It is important to them. To get people involved over the long haul, they have to care about this enough to stick with a campaign over time. Your goal is to build a large powerful organization, so you need many people, not just a few zealots or activists who care deeply about some “issue” but is not something that most people in the neighborhood, workplace, city, etc, care about.
This is why you have to listen to a lot of people. Many people have to care deeply about this issue before you decide to dedicate your organization to an issue.

There are other criteria too, often important. (See Bobo, p. 18 for chart)

**Section 3: Role Play**

**Time**: 60 minutes

**Student activity**: Act out role play, taking specific parts, below

**Choosing an Issue -- Role Play Exercise -- An example of a case study, but you should choose a case which is particularly relevant to your local situation**

You are the organizer of the Pleasant Park Tenants Association, a public housing development in a small city in New England.

Lately you have been working on getting a day care center set up with a special grant from the State. Many young mothers, including some of the top leaders of the Association, have been working on this for several months and you have been told by the State Office for Children that you are likely to get the grant. After almost a year of hard work, many people are excited about having a good day care center in the development.

Lately some people have been concerned about increased drug dealing in the development and some parents of teens have come to you and asked you to “do something” about the drug dealing.

Several of the elderly tenants have been upset about the new Federal drug laws which are costing them more money for necessary drugs. They want something done about this.

The local school board has just announced a $1500 fee for kindergarten, (which had always been free) due to State cut-backs in local aid to the city. The City has said nothing can be done because of the State cut backs, except a locally approved city-wide property tax increase, Everyone who knows anything about local politics tells you this is impossible. The city would never vote itself a property tax increase for kindergarten.

**Role Play:**

Which issue should you choose? You can *not* vote to work on all of them. You know the Tenants Association does not have the resources to work on more than one and you want one to be winnable, specific and deeply and widely felt.

You are about the hold a meeting of the tenant leadership to discuss which issue to pick. Which one should it be?

Your job as the organizer is to get the group to agree on ONE ISSUE. Members of the group will be advocates for various issues.
Cut this paper in sections with one role on each slip of paper and hand these papers to members of
the group to direct them to their role in the role play.

The Organizer: Hint: you want to get the group to agree to the criteria they will use to determine
what issue they pick before they pick the issue! Good luck! You have to get the group to agree on
something. You want to build the organization and not have it descend into bickering but agree on
something that will build the organization and develop some leadership so all the work does not fall
on your shoulders.

Day care advocates: You are the parents of young children. You have been working hard on getting
the day care at the development for years. You don’t want to be side tracked now!!! You have to
go to work, and can’t work without day care!

You are the parents of teens and are afraid of the drug dealing and that your kids might get involved
or victimized, or worse. You are not sure what to do but want the group to do something!!

You are the elderly tenants. Your prescription drugs prices are out of sight. The Federal
governments’ plan is terrible for you. You heard about Canada and think maybe the development
can hire a bus and get you and your friends up to Canada. It is only a 6 hour ride away to Montreal
where the drugs are cheaper!! You have lots of friends in town who are threatened with higher
property taxes and want no part of a local property tax increase! That might mean your friends will
have to leave town or possibly even become homeless.

You have a child going into kindergarten. You just found out the cost will be $1,500 which is not
in your budget. You want full day kindergarten but can’t afford the $1,500. You hope people will
vote for the small property tax increase necessary to fund full day kindergarten and you want the
group to work for that!

Facilitator’s Guide:

Using the role play below, ask the students to act out a meeting of the tenants' association where
they try to choose ONE issue for them to work on as a group.

It essential that you emphasize that they have to choose only one issue. Explain that their resources
are limited (this is in itself an important lesson in organizing: not biting off more than you can
chew!)

You can assign various students to be advocates for the various issues, playing the roles assigned
above.

Let them role play. Watch especially for the tendency not to adhere to the criteria, or even to try to
establish agreement on criteria before trying to choose the issue.

Take verbatim notes of the role play. Act as an anthropologist observer.

Questions for reflection after the role play:
- How did you feel during the role play?
- When did you feel scared? Angry? Sad? Powerful?
- Did the organizer succeed in establishing the criteria?
- How did /she do to get the group to abide by these criteria as a basis for establishing which issue to work on? If she/he did it well, how did she/he do it?
- How did they do in reflecting on how the various issues meet or do not meet the various criteria?
- If you gave up on having your issue chosen, how did that feel?
- What might facilitate a person giving up his/her issue to allow the group to choose one issue?

**Section 4 – The Root Causes of Problems**

**Time:** 30 minutes to one hour:

**Training Technique:** Group Discussion, Probing Questions and comments

**Aids:** Reading: Brown, (MLK quote: p. 123 and following discussion on p. 124

**Facilitator's Guide:**

The goal is to get students to reflect on where problems come from. What is the root cause of a problem?

The goal is not to simplify the root causes or to get the students to conclude that there is one right answer to this question. Too often we think in “either/or” frames. The answer is *either* this *or* that. It is sometimes *both/and*, and even more.

If we take the problems of poor schools, for example, how can we understand the root cause of this problem? We sometimes rush to find the answer: the teachers are no good, there is not enough money, the students come from bad homes and are not motivated to learn, the teachers' pay is too low, there is no accountability or sufficient testing of what the students are learning.

Our understanding of the root cause of any problem leads us to design solutions. (For example, with education, the assumption that the lack of accountability is the root cause of the problem, leads to standardized testing as the solution. Then government develops standardized tests that all must pass.)

Ask the students to come up with a problem in their workplace or neighborhood they care deeply about.

- Ask them to write that problem on the top of the flip chart.
- Ask them to discuss what is the root cause of the problem.
- How would they solve it?
- Does their solution go to the root cause?
- Are other problems related to this problem?
- Do you have to solve the other problems as well to solve the problem they chose?
- Why?
The flip chart should be as below:

PROBLEM ________________

- What is the root cause of the problem? ________________
- How would YOU solve it?
- Does this solution go to the root cause? [ ] YES [ ] NO [ ] MAYBE [ ] NOT SURE
- [ ] EXPLAIN ________________
- Are other problems related to this problem? ________________
- What are they? ________________
- Do you have to solve them as well to solve this problem? [ ] YES [ ] NO [ ] NOT SURE
- EXPLAIN ________________
- Why? ________________

Section 5 -- Mapping the problem

Time: 30 to 45 minutes:
Tools: flip charts and markers
Technique: Flip chart “gallery walk” of the various “problem” flip charts (above) in silence, group peer discussion and case study discussion led by teacher/trainer

Theory:

This exercise is designed to show how various community and workplace problems are related. This is the function of the silent gallery walk of flip charts.

It is also designed to introduce the students to strategic thinking and to the theory that issues are often directed to specific people with the authority to solve the issue, and that you eventually have to negotiate with a specific person or persons to solve the problem.

It also is designed to guide the students to better understand the self-interest and motivation of the person with the authority to solve the problem.

Facilitator's guide:

Put up all the flip charts from the previous exercise on a wall where students can view them all. Ask all participants to look at all of them in silence.

Then ask the groups to go back to their own problem and ask these questions:

- Who can solve the problem? or “issue?”:
- Where is that person or persons?
- What will influence that person?
- What authority do they have?
- Where do they get that authority?
• If you don't know, who can solve this problem, or what will influence him/her or them, how can you find out?
• Who are your allies in solving this problem?

*Questions regarding power to solve the problem or win the issue:*

And then to think where power comes from, and to think critically about power. Who exercises power? Where does that power come from?

If you want to change some condition in your community or workplace, how can you do that?

Do you agree with Kahn on “How the opposition exercises power?” (p. 8 in Kahn)

**Time:** 30 minutes  
**Tools:** One long (15 foot by 3-foot roll of paper)  
**Technique:** Student peer discussion about various problems and drawing, with colored markers, the lines of connections the see between the different flip charts of problems and issues.

**Facilitation:**

Have the students put the problem flip charts on the larger piece of paper and have them draw all the connections they can between the problems, who can solve them, and guide them to look for root causes and connections between the various problems they have identified.  
**Report Out:** their findings.

**Section 6 – Evaluation of the Day**

Conduct evaluation of the day (What was good? What would you have changed?)

If time allows use the “Parking Lot” flip chart to go over questions previously asked.
Session Three: Developing Leaders

Note: All sessions will start with a reflection session that reviews the previous session and allows students to reflect upon the previous sessions. (See Session 2, Section 1)

Goals:
- To understand the role of an organizer and the role of a leader in a community organization.
- To provide an opportunity to students to reflect on their own leadership and leadership in their own lives and communities.
- To understand basic methods of developing the leadership of another person in an organizational setting.

Readings for this session
Richard Rothstein, What is an Organizer? Handout (not published)
McSorely: Hang-Ups of Organizers Handout (not published)
Kahn, pp. 11-13
Minieri, pp. 248-250
Bobo: pp. 224-229

Section 1 – The role of the Organizer:

Total Time: 35 minutes
Goal of this session: To convey the role of the organizer and to have students reflect on their understanding of the role of an organizer from the readings

Technique: Small group discussion, with each participant receiving appropriately equal time to speak. Make sure the others listen and not interrupt or tell the speaker how they feel, etc.
Trainer: Assign small groups and either listen or let the groups talk on their own. Be available to answer questions from the small groups.
Aids: Flip chart to record understandings of role of the organizers in report back.
Time: 15 minutes

Content: Ask each small group (or pairs) to reflect on the reading.
- What part of the organizer’s role would they find easy to do?
- Which would be harder for them?

Report out of small groups: Chart important reflections or questions.
Time: 10 minutes

Section 2 – ”Leaders” and “Organizers”

Time: 30 minutes
Technique: Large group discussion, Q and A (having assigned reading before this session)
Aids: Readings (above)
Content:
Ask students, during their reading, to mark the readings: what they agree with, disagree with, don't understand. Ask what most speaks to them.

Record the major learning and questions.

Explain that “organizers” and “leaders” are sometimes seen as different, but they often do the same work: developing leaders and building the organization.

Section 3 – The Role of Leaders

Time: 10 minutes
Goal: To understand some of the attributes and functions of a leader in a community setting
Technique: Q and A, group discussion and personal reflection exercise

Main Points:
Leaders have followers. Leaders influence others. Leadership is distinct from authority, either workplace or legal (governmental) authority.

Emphasize this distinction. Too often people mistake authority (President, bosses) with leadership. Martin Luther King, Jr, for example, had influence and exercised leadership, but had little formal authority. His influence was moral and personal. Leaders often exercise influence rather than authority.

Reflection Exercise and Report
Time: 10 minutes

Content: Ask students to reflect: Who in your life do you regard as a leader?
Technique: Students’ writing
Content: Students do this work in silence for 5 minutes.
Report Out: Time: (Five minutes)
- Ask for examples of who they regarded as leaders.
- Chart what these people did to exercise leadership.

Some questions to guide discussion:
- How can you develop influence with others?
- Who has influence with you?
- How did they achieve that influence?

Section 4 -- Looking Into Yourself

Time: 20 minutes, 10 minutes to fill out form, 10 minutes to work in pairs.
Exercise: (See Brown, p. 42-43)
Technique: Personal reflection and then comparing notes and listening in pairs.
Content: Have students do this exercise, first as a personal reflection, filling out the form and questions on pp. 42 - 43.

Section 5 -- Exercise in Group Accountability

Time: 20 to 30 minutes

Technique: Group report out and sharing changes in attitude and behavior they hope to accomplish

Content

Ask the students to share the behavior(s) they would like to change.

Ask them also to reflect on how they feel when they are sharing these goals with the group, as opposed to with only one other person.

- Is the accountability they feel with the group greater or less than what they feel with one other person?

Ask them to reflect on how the person they partner with or the group might best hold them accountable. What makes the difference?

Note:

It would help for the teacher/trainer to reflect on some personal attitude he/she will have to give up, and what are some of the obstacles to giving up that attitude and the behaviors that go with it.

It will also be useful for the students to keep a log of how they are doing in changing their behavior over time. (Please be easy on them if they don't change overnight. Changing habits takes practice. Checking in on an on-going basis is useful.

It also can be useful to develop not only the personal (one on one accountability) suggested in the exercise (p. 43) but to also demonstrate the power of group accountability.

- How do personal and group accountability differ?
- Why this is so?
- How might they use this observation in their organizing work?

Try to build in group accountability over the course of the sessions to demonstrate the power of the group to hold each member of the group accountable for his/her own actions.

Describe the practice of the Industrial Areas Foundation groups, among other community organizations, when organizing turn-out for a large event – where numbers count! Each group makes a public commitment to the entire group for a specific projected turn-out number before the event and then reports their actual turn-out number at the event itself. (“We committed to bringing 20 people from our congregation and there are 15 people here!” Applause! ) There is a culture of no shame or blame during this accounting. It generally increases accountability and turn-out.

Section 6 -- Readings

Time: 15 minutes
**Background Reading:** Brown, pp. 187-208

**Technique:** Q and A about readings (above pages)
Section 7 – Exercise on Developing Leaders

**Time:** 30 minutes (10 minutes for each person to do the exercise)

**Technique:** Demonstration of exercise by trainer with volunteer student. Q and A. Then exercise repeated among students in groups of three, with report backs.

**Content:** Developing the leadership of others in a community organization. Exercise: Brown, pp 206-208.

**Demonstration:** Ask for a volunteer from the group for someone to work in front of the group in this exercise to develop the leadership of another person.

Before choosing a volunteer, ask:

“Who knows someone pretty well, knows about their background, their motivation, or at least something about those things, and is interested in developing the leadership of someone else in your group? (It could be your family, community organization, work place, etc.)

The main requirement here is that they know a person well enough to be able to answer a number of questions (see exercise pp. 206-208) in front of the group. (Note: they need not use the person's real name, so his/her identify can remain confidential)

When someone volunteers, ask them to come to front of the room, and go thru the questions in the exercise, writing down their answers on a flip chart, as much as possible, in his/her exact words. If they come to a question where they do not know the answer (this often happens) you can add: “This is a place you might want to go back to that person and find out more about them.”

It is not shameful not to know everything about them, but indicates the kind of knowledge that is needed to develop their leadership. This exercise focuses on the person whose leadership you want to develop.

The most important point in the exercise is the “Next step for leadership.” Be very specific. Use the formula: “Who will do exactly what and by when.”

Leadership steps are specific actions.
(Note: The WHO will do WHAT and by WHEN formula is a good method for many kinds of planning)

The main points you want to convey here are:

A key function of any organizer (or leader) in community organizing is to develop the leadership of others. This, like planning meetings, events or issue campaigns, takes effort, thought and planning. *You can think about learning more about someone* without being manipulative or devious.

*You need to take some time* (out of your busy day doing doing doing) and think about one individual. Organizers and leaders develop the leadership of others. This is a retail operation. It is done one person at a time. One size does not fit all.

Their next step will be some action, some specific behavior. *You are also often testing* how s/he will do
You can have a conversation with that person to let them know what you think they can do and why. You can be transparent about your requests.

Leadership development is an act of love and caring about someone. You are trying to help someone fulfill the gifts that God gave them.

After this demonstration is completed, ask for any further questions.

When done, move to the exercise below.

**Small Group Leadership Development Exercise:**
**Technique: Group work in threes**

**Content:**
Ask them to conduct the exercise as they observed you doing it, except now ask them to do it in threes, with one person asking the questions or the person thinking about their potential leader (as you just demonstrated with the volunteer), and the third person coaching, making sure that the actions the “leadership developer” are suggesting are very specific and actionable, not abstract or unclear.

Ask them to fill out this on paper, so it is clear what they will be doing. Writing down the steps is critical to avoid them “slip sliding” away and/or forgetting what they suggested.

**Report back:**

After all have completed the exercise, ask them how it went, whether they had the information about people they want to develop. How did it feel? What was easy? What was hard?

**Section 8 – The Iron Rule of Organizing**

**Goals:**
- To show how the Iron rule is hard to internalize and complex to use. People often have similar emotional blocks to using it well.
- To provide opportunities for the group to help and consult with each other.
- To demonstrate the intelligence of the group and its power to help its members.

**Time: 45 minutes**

**Background Reading:**
Minieri, p. 246
Brown, pp. 209-224

**Additional reading:** Osterman, Paul, *Gathering Power*, p. 64-65, 67

**Technique:** Reflection on reading.

Can be done in the large group, with a Q and A from teacher, or first in pairs, with students reading the pages in Brown and sharing what they thought about the reading.
Ask for reflections on the readings. Ask for specific sentences that people liked, did not like, or did not understand or challenge.

Other questions: What did you think of Michael asking Elizabeth to do the door knocking? Was this too pushy or manipulative? For whose good was Michael doing this? Why do you think this? How would you feel doing this? What might make it easy or hard to ask someone to do something they initially say they don't want to do?

**Conduct Exercise in Brown p. 219-220**

**Introduction:**

A key function of any organizer (or leader) in community organizing is to develop the leadership of others. This, like planning meetings, events or issue campaigns, takes effort, thought and planning. It also requires that people internalize “the Iron Rule of Organizing” – develop leadership by never doing anything for them that they can do for themselves”.

This is a reflection exercise, meant to examine your thoughts and feelings. They will help you use the Iron Rule effectively. The Iron Rule is meant both to help others develop their potential and abilities (as opposed to you demonstrating your competence!) and also to develop the organization. If only a few people consider themselves competent and do all the work the organization is not likely to succeed. People will burn out. There will not be enough people to get all the work done. People won't join the organization if it seems like a clique with a few people doing all the work.

1. Ask people to do the exercise silently by themselves, writing down their answers. Time: 15 minutes.

2. **Small group exercise:** Then ask people to get into small groups of four to six and go around and tell each other what they discovered about themselves by doing the exercise. Suggest that the group consult with each to improve their ability to use the Iron Rule effectively. Ask one person in each group to take notes to report back to the whole group. (Time: 20 minutes for this)

3. **Full Group Report back:** Listen to report back from each group. Note similarities.

**Session 4 -- Critical thinking, reflective practice, field research**

**Section 1 -- Reflection in Action:**

Time: 45 -60 minutes

Readings
Freire, Paulo, *Pedagogy of the Oppressed*, pp. 57-74 (Chapter Two)
Brown, p. 36, pp. 192-202, pp 342-343
Bobo, et al. pp. 6-7

**Discussion of Readings:**

**Main Goal: To help student to think critically**

**Some questions to guide you.**
Ask students to compare Schon's description of technical knowledge and the growth of professionals and professional knowledge with McKibben's analysis of economics.

There is are schools of economics to train economists. What values and assumptions, especially about growth do they hold that influence our understanding of economics today?
What assumptions, especially about growth do we make? About economics and happiness?
About economics and “self-interest” as organizers understand “self-interest?”
Is there such a thing as “the economy?”: (Many people talk about it. Where is it?)

Using the readings in Brown and Bobo (above) –

How do you understand “self-interest?”

How does this compare to the way traditional economists understand self-interest? (See McKibben's criticism again for getting at the assumptions of traditional economists.)

Why do you think there was a “chorus of no's” when Mary (p. 5 in Kovari, et al) asked people to tell a story about their personal history of voting?

How does the “Do I know what I think I know?” (Kovari, p. 7) relate to Schon's description of knowledge and how it is developed and conveyed? (Schon, pp. 3-30)

How does this relate to Freire's description of traditional education? (Freire, pp. 57-84)

From the reading in Schon: (especially, pp 189-191):
- What, in general, do you think the function of feedback is?
- Why do we give (or not give) feedback?
- Why was it essential that the doctors, nurses and orderlies were all involved in solving the drug mistake problem (Schon, pp. 189-191)?
- How might an outside expert have approached the drug use mistake problem?

How do we move from blame to solving problems?
- What are the obstacles to doing that?
(Compare the IAF turn-out feedback method, above, and group accountability above as suggested)
Section 2 -- Field Research

Time: 3 -5 hours

Readings:
Trapp, Shel, *Dynamics of Organizing*, pp. 50-55
Brown, pp., 53-54, p. 311-316, pp. 324-326,
Minieri, pp. 155-181
Bobo, pp. 162-174

Techniques: Reading and reflection.

Field research: specifically going to get information about an issue from people who have information related to that issue. Also research thru the Internet and other written sources of information.

Subsection A:
Techniques:
Q and A. Possible discussion in pairs, then whole group report out and discussion:
Time: one hour for this subsection, or more

'Some questions to guide the reading and discussion of the readings.

What are some forms of information gathering?
(suggestions should include: surveys, one on one conversations, focus groups, (see Brown, p. 53-54), Internet research, physical inspections (For example, one environmental group, stood by idling buses with stop watches to time the number of seconds the buses kept their engines idling, despite laws forbidding engine idling. Another group timed the frequency of bus arrivals, and compared these to the published schedules)

What are the advantages or disadvantages of various forms of information gathering?
(Refer here to the Trapp stories(above) or the stories in Brown: pp. 325-326- and pp., 316-317)

*From the Trapp readings:*

Why were the meetings with the banks important to finding out about “red-lining?” How else (if at all) might they have found out about the red-lining? What is relationship between action (and the reaction you get) and research?

Why was the comment of the regional HUD director (p. 51, “If you want anything else you will have to go to Washington, DC and get the changes from there.”) important?

(Note: an important point here is that “research” comes from and is part of action. Research, in this context, is not an intellectual activity. It includes thinking in action, and learning from action)
Field research: (Minieri's section is very detailed on this: Make sure it is read, along with the rest of the readings)

Field research can include the following:

1. Research on issue selection: This could involve listening to people about their concerns, in groups, one on one, in focus groups, written surveys, listening visits door to door, by gathering existing data.

2. Power analysis: Research on who has the power to solve the problem. This could include legal research, corporate research, legislative or regulatory research, and also research on how the laws and regulations are actually applied.

For example, on the issue of reforming the Criminal Offender Records Information (CORI) system, research could include the following issues related to power-building –
- How many people care about this issue (including research to identify specific cases of problems with the CORI system and who has been hurt),
- How the law is applied by employers, public housing agencies and colleges,
- How it is implemented by the state agencies that collect the information, who decides how the information is disseminated or available, etc.
- What are the laws, regulations and informal norms and practices that agency personnel have developed over time?

Research on the Target:
- Who has the authority to solve the problem? (This may be many people, including specific people within agencies of government)
- What would influence that person? What arguments would be most effective?
- Who would influence that person?

Strategic research:
- What is the history of this issue?
- Who are your allies on this issue?
- Who are your opponents?
- What is the strength of the allies? Opponents?
- How strong is their support? Opposition?
- What are allies willing to do? Likely not willing to do?

Questions before going out to do field research:
- How do you feel about going out and getting information?
- Do you feel it is your right?
- Is there anything you are afraid of?
- What is the worst thing that might happen?
- What is the best thing that might happen?
Conducting Field Research:

1. Planning: (30 minutes) Students plan their research in teams, ideally 4 to 10 people, depending on the overall size of the group. This should include assignments of research responsibilities to each student. I suggest that students go in pairs into the field.
2. Actual research: could include going to City Hall, State agencies, elected officials, attending regularly scheduled meetings of commissions or boards, going to non-profit agencies, going door to door in a neighborhood to gather data on issue concerns.
3. Instructors should be available (by phone or in person) to answer questions that might arise during the course of the field research.

Report back and evaluation in small group teams

Reports should include:
   1. Written recording of all data from research.
   2. Sharing this data with other members of the team.
   3. Notation and observation of missing information
   4. Celebration of research successes: important and useful information found
   5. Evaluation of how that information was found
   6. Any surprises?
   7. Learnings

Report out of teams to the whole group:
   1. Report from the team by a designated recorder and reporter
   2. Q and A from the rest of the larger group
   3. Notice of specific learnings from the research
   4. Notice of missing information
   5. Next steps for research

Overall Evaluation of Field Research Exercise.

Session 5
Section 1 -- Public and Private Relationships

Techniques: Lecture, Q and A, story with questions, and personal reflection exercise
Time: 30 minutes

Content:
The main point is to convey the difference between public and private relationships. Public relationships are those we have with people in public life (elected officials, city, town or state officials, etc) and those we have in our private lives – with friends, family, etc.

This distinction is important because it is generally blurred by those in public life, especially elected officials. The culture of elections in the US generally revolves around the personalities of the candidates: who is likable, whether they seem to be someone like us, etc. Unlike European parliamentary democracies, we have weak political parties. The candidates themselves are the
focus, not the policies they stand for. Candidates themselves often blur the distinctions between
public and private life, by trying to relate to us as friends rather than as representatives of a group
that would represent our interests.

So, in community organizing, we try to maintain a clear distinction between our private and public
relationships, and maintain *public* relationships with people who are in public life, acting with
according to what they do (their public policies and actions) not whether we like them as people. It
is important to recognize the difficulty in doing this. This can be especially hard when we have
worked to elect a candidate, she or he has won, and then we disagree with a policy s/he wants to
enact. If we can maintain the distinction between public and private relationships, we can do this
more easily, even if it is not always easy.

Ask for questions, and examples of public and private relationships in the lives of the students' own
lives and their reactions to these ideas.

**Story:**

The Mayor of the city has developed a relationship with one of the leaders of a community
organization and had her home phone number. One day the Mayor called and asked for “Gladys,”
and said it was “Tom” calling. Gladys’ daughter answered the phone.

The daughter, twelve years old had been taught how to answer the phone, and when “Tom” said he
was calling for her mother, she said, “Mom, Mr. Mayor is on the phone.” The leader had learned
the difference between public and private relationships, had taught this to her daughter, and
reinforced this by always making sure to call the Mayor, “Mr Mayor” although he often tried to blur
the distinction and call himself “Tom,” as if he were a friend.

The Mayor thought he might be able to develop what we would call a private relationship with the
organization's leader, but that would not be good for the organization – if it made its decisions on
personal feelings rather than on public behavior of the Mayor.

- What does this story tell you?
- What do you think might happen to the organization's leader if she let herself be called
  “Gladys” by the Mayor and if she called the Mayor “Tom?”
- Why do you think the Mayor wants to be called “Tom?”

**Exercise: Reflection:**

Take a piece of paper and draw a line vertically down the middle of the paper. At the top of the left
column write: “Public” and on the top of the right, “Private.” Take 5 minutes to write down the
names of people with whom you have public relationships with (even if you do not know them
personally) and then those with whom you have private relationships.

Then ask students to get into pairs and check in with each other how they felt about dividing people
into such public and private relationships.

**Report Out:** Ask for their feelings and questions about this division of relationships.
Section 2 -- Direct Action: Where does your power come from?

Role play, debrief.
**Time:** 90 minutes, including introduction of role play, role play and debrief.

**Introduction:**
This role play is designed to get participants to feel what it is like to confront a public official about an issue that is important to them, to get inside the feelings of both the people without much power and those with official authority and power. It is also designed to allow people to reflect on where their power might come from in such a direct negotiation.

Designate three people to be the team of public officials, one person to be from the media, and all the rest of the group to be people from a neighborhood. Pay attention to gender, race in choosing people for the various roles. Depending on the make-up of the entire group, it might make sense to have a traditionally “target” person (a woman or person of color) be the authority, the officials.

Then hand out the following papers to people playing different roles:

**Handout for the Neighborhood Group Role Play:**

Where does your power come from?

Members of your group are upset that kids in your neighborhood have no place to play. There are no playgrounds in your neighborhood although your research shows that the city owns several vacant lots in your neighborhood. These theoretically could be turned into playgrounds. They are big enough and several are well located.

Your research also shows that the neighborhood where Bob Bigshot (the Director of Parks and Recreation) lives has several city owned playgrounds.

Last week two young children of your group's members were hit by cars while playing in the street. They were seriously hurt, although not killed, and your group decides it is time to visit Bob Bigshot. You have heard that Bob is not such a bad buy, and that he also has an assistant, also named Bob, who tries to keep community groups away from his boss.

You want to get some specific commitment from Bob Bigshot to help your neighborhood. You need to plan this meeting carefully. You want to have one spokesperson so things do not get out of hand. You want to have everyone's role planned. You want to not let Bob waffle but get some specific commitment. (exactly what that will be is up to your group, and you should decide this in your planning session.)

You have 45 minutes to plan your action.
You will have about 20 minutes to carry out the meeting with Bob
Don't forget to think where your power comes from!
Handout for the Media Role

You are the journalist from the local paper. Responding to a press release, you decide to cover the event. First you interview Bob Bigshot

Then you accompany the neighborhood group. You have a press deadline in one hour. You want to keep your eyes on the leader of the group and look for one person to interview as the leader.

You want to interview the parents of the kids that were hit by the cars. Victim stories sell newspapers. And what about the drug dealing that Bob Bigshot says will come from any new playgrounds? Inquiring minds want to know!

You have to corner the leader or leaders. You want to pull them away from the group as soon as possible to get the interview. They may be resistant, but remind them you have a deadline. Tell them you have already talked to Bob Bigshot and you need to talk to them right away to get their side of the story. Otherwise you can't print it, and you have a deadline coming up soon!

Questions to ask:

● Why are you taking such radical action?
● Did you send a letter first?
● What about the connection between drug dealing and playgrounds?
● What hospital did the kids go to when they were hit by the cars?
● Who were their doctors?
● Weren't the parents neglectful in letting them play in the streets?

Remember, you are the protector of the right of freedom of the press and you have a right to pester.

Handout for Parks and Rec Receptionist

Yes, at Parks and Rec, the boys are at the top in the power positions the women get the low-lying jobs, like you! You get no respect from your boss, your co-workers, or the public. The neighborhood groups that come into your office never even ask your name. To them you are just an obstacle to get by.

Little do they know that YOUR kids also have no place to play in your neighborhood either! If they only asked, they would discover that you know more about the inner workings of the Parks and Rec department than anyone else. The current Director has only been there for two years and you have been there for 18 years!

Your job is to get the neighborhood groups to go home. Over the years you have developed a bunch of perfect one-liners that have stood the test of time.

-- Do you have an appointment?
- I would be happy to book an appointment for you with him, how about tomorrow morning?
- I just work here
- Please don't make so much noise. It is not fair to take it out on me
- He is just too busy to see you now.
- Can I get you anything?

On occasion, that extra-special group just won't take “no” for an answer. Let them know that you will do the best you can and return Bob, Bob Go-fer, that is.

(But, if they only asked you, a really really special group would tell them the really inner workings of the department and how and where they could get their playground!!)

**Handout for Bob Go-Fer**

Bob Bigshot is one great boss. Except when he makes you take the heat with those neighborhood groups. Most of them never realize that they are only talking to a flunkie with no real power. But when the receptionist calls you and you show up and introduce yourself as “Bob” they assume you are Bob Bigshot. If they only asked!

Since you have no power, you never use the pronoun “I” when speaking to neighborhood groups: Instead you always say “the Parks Department.” You make excuses like:

- The Parks Department budget is depleted
- The Parks Department is understaffed
- Playgrounds are political: maybe you should write the Mayor or your Congressman.

After exhausting your excuses, announce to the group that you are not Bob Bigshot, the person they really need to see.

**Handout for Bob Big Shot**

You are an appointed City Official, so you have nothing to fear from any neighborhood group. You grew up on the poor side of town, so you can claim empathy. Of course, you have not been there in years – not since you pulled yourself up by your bootstraps and worked your way up thru City government. You think if these people want something better for themselves, they should get a job, like you did, and move to a nicer neighborhood.

You are far too busy to meet with any neighborhood group. That is what your flunkie is for, to get rid of these pests. How convenient that his name is also Bob, Bob Gofer, of course. Most neighborhood groups don't realize that they are meeting with the wrong Bob.

But, at times, even Bob Gofer can't keep the groups away. When they come, you are ready with your lines:
- Why don't you make an appointment?
- I don't meet with mobs. I will meet with two representatives.
- Playgrounds breed drug dealing. Is that what you want? More drugs?
- Parents who let their kids play in the street are guilty of neglect.
- I used to live there, I sympathize with you
- I promise to study your proposal
- I will do everything I can to support your cause in every way I can.
- Would you like to meet over coffee?
- How do I join your group?

Your overall goal is to get them leave without pinning you down on specifics.

**Role Play Preparation:**
Find some place where Bob Bigshot can have an office that is out of sight of the Receptionist, so it is not obvious when the group comes into the Parks and Rec office where Bob Bigshot is. The goal is to hide Bob Bigshot from the neighborhood group as much as possible. Set up the receptionist's desk so it is a barrier to the group getting to see Bigshot.

**During the Planning Session**
Observe the planning session of the neighborhood group, while giving the roles to the City Officials and the media, and allow them to plan by themselves, out of earshot of the neighborhood group.

Observe the planning session of the neighborhood group and take notes of the dialog, as much verbatim as you can.

- Do they establish a spokesperson for the group? A press relations person?
- Do they develop plans about what they will do in case they encounter various scenarios?
- Do they set a specific goal for what they want?
- Do they decide ahead of time on a decision-making process during the action itself? (Like a short caucus?) How does the group itself make decisions?
- Are there any clear process losses or process gains during their planning session?

**During the Role Play:**
How does the group treat the receptionist? Do they inquire about her personally? Or do they treat her only as an obstacle? (It is rare for a group to ask her much about herself). In the debrief, it is important to emphasize the potential she has for helping the group!

What tactics does the group use to express their power? How do they deal with the reporter?

Do they follow their own plan? Do they have a disciplined group? Or does anyone and everyone start talking and responding. Act like an anthropologist here, taking notes, as much verbatim as possible, to feed back later what they actually did. You are almost like a tape recorder here, observing their behavior, both verbal and non-verbal to provide accurate feedback later.

When the role play is about over (20 minutes should be enough), tell them to stop the action. Although, if the group has not yet made contact with Bob (at least one of them), you might want the role play to continue.

**Debrief:**
Ask each group and each person to read their roles to the entire group. Wait for reactions, especially with the receptionists role. If the group had not asked her, this is often a big revelation to them!
Ask how they felt, group by group, and person by person. This is an opportunity for all to get a sense of how “the other” feels.

After they have said how they felt, ask them to evaluate how they thought they did. What were their goals for the action?
- Did they reach their goals?
- Why or why not?
- What did they do that was good?
- What were some options they could have used to do better?

Toward the end of the debrief, present your finding, and go over their behavior and what you thought they did well, and what were some problems.

Section 4 -- Asking Questions, Searching for Answers

**Techniques:** Video viewing, group discussion after viewing.

**Time:** 30 minutes

Go the website: DroppingKnowledge.org and view these short videos on line.
Go to Media/films and view “The Question Movie”
Then go to Media/Question videos and view at least two of the question videos. I suggest the Question videos by Cindy Sheehan and Barry Armbrister.
(Note: these are my suggestions. The point is to find videos that will provocative and appropriate for the audience. *The Question Movie* is the basic one and I suggest all view that.)

What do you think of these videos?
What power, if any do they have?
- Are questions so important?
- How might you employ the kind of questions they ask here in your own life and work?

Section 5 -- Journal-Writing

**Time:** 20 minutes, 10 minutes journal writing, 10 minutes debrief

**Introduction:**
Provide journal for all students. (Or ask students to have a notebook they can devote to journaling)

Ask them to take 10 minutes to write their reflections on the day or what they have learned over the course of all the sessions. Ask them not to edit what they write, but just to write whatever comes into their minds. Ask them to write quickly, without editing or worrying what anyone would say if they saw it. This writing will only be for themselves.

After the 10 minutes of journaling, ask for reflections and comments on what they learned, and encourage them to continue the writing at least on a weekly basis.

**Evaluation:** Plus/ Delta.