

** WHY ORGANIZE? **

Two hours, 15 minutes
One facilitator
Six to twenty participants

BACKGROUND:

This session can be conducted with a group of people who have just formed or joined a community organization. It is especially valuable for those who have not been part of an organization and have very little experience organizing. A good icebreaker for this session is to have each person tell why s/he decided to attend and participate in this training session. The responses will help lead into a discussion of why organizing is important. Since this session will usually be conducted with new members and groups, it also includes an orientation to KFTC and some general features of organizing.

PURPOSE:

For participants to understand why organizing is important.

OBJECTIVES:

- (1) To develop a list of reasons why organizing is important
 - (2) To practice explaining to others the importance of organizing
 - (3) To identify the three basic goals of good organizing (winning issues, building the organization and broadening the members' experience of institutions and systems which affect their lives and the lives of others) and a list of organizing skills associated with each goal
 - (4) To clarify the roles of members, leaders, organizers and technical experts involved in an organization
- (1) To introduce people to KFTC's leadership development and organizing assistance programs.

METHODS:

- (1) Reasons to organize {40 minutes}

Begin by explaining that this session requires full participation by everyone. The session is designed so that the participants share ideas and learn from each other. Mention that the facilitator will not be doing any lecturing—in fact, if you talk more than two consecutive minutes, tell the participants they have your permission to throw a shoe at you!

Divide the participants into small groups of three to five people. Ask them to meet for 20 minutes and discuss the question, "Why is it important to organize?" Pass out paper and pencils to one person in each group and ask them to take notes so they can report back to the full group later. After 20 minutes, return to the full group and have each small group report on their discussions. List the participants' reasons for organizing on newsprint.

A sample list of responses:

- To win issues
- To gain power, clout
- To empower people
- To build a group
- To get things done

- To solve problems and work on common goals
- To influence public matters
- To utilize the strength of numbers, people power
- To represent people's needs
- To help each other

- To support each other
- To develop skills and learn from each other
- To exercise and assert rights
- To work for justice, democracy
- To get people to work together

- To get people to understand issues
- To get people to cooperate
- To learn about our rights
- To get more ideas
- To eliminate isolation, confusion, duplication

- To bring about lasting change

When developing this list, have the full group discuss what it means to gain and exercise power, since power is central to organizing. Discuss the difference between power used for self-interest (such as that used by many corporate executives and politicians) and power used for the common good (such as that exercised by democratic community organizations). Other points to emphasize during this discussion are: power can be a positive or negative thing, depending on how it is used and in whose interest and power is the ability to act. (Facilitator's note: Sometimes when discussing power, someone will bring up the power of God and religious faith. The facilitator should be prepared to deal with this response by saying that faith in God can be an important source of strength for many people, then focus the discussion back to the power of organizations, resulting from the strength of many people working together.)

Another point that can be discussed in further detail is that organizing is a way to help people but its emphasis is not the same as direct service or advocacy. With direct service, people provide others with what they need and help others get what they want. When organizing, people help each other and themselves by working together for what they want. With advocacy, people help others by speaking for them and acting on their

behalf. When organizing, people must speak for themselves and act, as a group, to accomplish their shared goals. The distinctions between organizing, advocacy and direct service are not always clear cut, but the definitions above should help illustrate the general differences.

(2) Practice explaining the importance of organizing {30 minutes}

Explain to the group that one of the keys to an organization's success is that people have to believe in an organization and its potential. An important skill for group members to have is the ability to convince others of the importance of organizing. A good way to develop this skill is to practice speaking to others about the organization you belong to and why it is important.

Pick two people in the group to do a short role-play. Ask them to sit in two chairs in the center (or front) of the room where everyone can see them. Ask one person to be the recruiter and the other to be the recruitee. Explain that the goal of the recruiter will be to talk with the other person for about 5 minutes and convince that person of the importance of organizing and joining the group. Describe the following situation:

The recruiter is a parent of two children who attend McDoomed high School. There have been a number of problems at the school, but the principal refuses to do anything about the problems. The school is filthy because of a poor maintenance system. The boiler is ready to blow up. The parking lot and entrance is all muddy so students get their clothes dirty when they enter or leave the school, and students have found cockroaches in their french-fries. Parents (and students) are finally getting fed up and want to do something. Many parents have complained to the school on their own but nothing ever changes. So they've decided to organize into a new group—the McDoomed Parents Association. The group is planning to meet Monday to discuss how to go about getting these problems straightened out.

(The above situation is useful if the participants come from many groups. If the participants are from the same group, their actual organization and issue can be used in this role-play.)

Explain to the recruiter that s/he should try to convince the recruitee that having a group is important and that his/her involvement is needed. While doing this, the recruitee should keep in mind the list of reasons why organizing is important, generated by the group in the previous exercise. Encourage the recruiter to emphasize the need for organizing more than getting bogged down into the specifics of the issue. Also, the recruited should try to convince the recruitee to attend the meeting on Monday. The other person should take the role of a "typical" resident of the community who does not belong to the organization but would benefit by being a member. Ask the rest of the participants to briefly describe the characteristics of the "typical resident." (For example, this person could be a middle-aged woman with two children at McDoomed high school. S/he works at home and is reluctant to join any group.) Have the person acting out the recruitee role take on whatever characteristics the other participants suggest (however, the characteristics should not be too atypical—such as the recruitee being a school board member or the spouse of the school principle).

Have the group also decide where such an interaction would likely take place, such as someone's home, at a shopping center, over the phone, etc. Ask those acting out the role-play to pretend that they are at the place suggested by the group.

Ask the participants to try to wrap up the role-play within 5 minutes. Give the recruitee a minute to think of what s/he wants to say, then begin the role-play. Afterwards, evaluate the role-play. Ask the recruiter, the recruitee, then the other participants, in that order, what they think went well with the role-play. Then ask people, in the same order, what could be improved.

After some discussion, repeat the role-play and evaluation with another pair of participants. [Note to facilitator: Add 25 minutes extra for each role-play and the evaluation of it.] The group may want to assign new characteristics to the person acting out the role of a "typical" community resident.

{At the end of the role-play(s), the facilitator may want to point out that the above situation was actually true—although the school was called the McDowell High School in Floyd county, Kentucky. Parents organized and eventually got all of the problems cleared up—and the principal of the school even resigned because of all the public pressure. }

(3) Three basic goals of organizing and associated organizing skills
{25 minutes}

The facilitator should tell the group there are three basic goals of organizing. Tell the group you will discuss the first two goals first, then afterwards discuss the third goal.

The facilitator should display two sheets of newsprint. At the top of one sheet write, "WINNING THE ISSUE (S)" and at the top of the other write, "BUILDING THE GROUP."

Tell the group that effective organizing involves winning issue(s) and building the group. Ask what organizing skills or activities are necessary building the group. These are skills needed, regardless of the issue. List the responses on newsprint under the appropriate heading. Then ask the group what under the appropriate heading. Then as the group what skill are needed for winning the issue. List these responses on newsprint.

Below are sample lists for each basic goal:

BUILDING THE GROUP

- Membership recruitment
- Leadership development
- Fund-raising
- Developing group structure
- Electing officers
- Running good meetings
- Planning and evaluation
- Developing group morale
- Develop shared purpose
- Spreading the workload

- Celebrating
- Public speaking, publicity

WINNING THE ISSUE

- Conducting research
- Developing strategy
- Carrying out tactics
- Generating publicity
- Choosing good issues
- Setting realistic goals
- Power analysis

Ask the group to discuss why building the group and winning issue(s) are both vital components of organizing and why a group must focus on them simultaneously to maximize the effectiveness of an organizing drive. Ask what might happen if a group focuses on one of these goals but not the other. Some points to bring out during this discussion are:

- A group that spends all of its time trying to win an issue will not have a well-developed membership and leadership base.
- A group that focuses too much energy on building the organization, merely for the sake of expansion or fund-raising, may become so institutionalized that it loses sight of its issue goals.
- A group that balances the amount of energy put into winning issues and building the organization will be most successful because the coordinated efforts of an active and skilled membership base leads to issue victories.

Once the group has a good grasp of the first two basic goals of organizing, the facilitator should tell the group there is a third important goal of organizing. This third aspect is what makes KFTC and the groups it works with different from many other groups. After all, right-wing evangelists such as Jerry Falwell have a lot of success building groups and winning issues. So has the Ku Klux Klan and Nazi groups. They have, sometimes developed powerful organizations and won issues such as blocking the rights of Blacks and Jews or getting schools and libraries to censor books they don't approve of.

The third goal of organizing is, broadening the members' experience and understanding of institutions and systems, which affect their own lives and the lives of others. This goal includes developing an understanding and respect for all people and the rights to which they are entitled. Next to the two sheets of newsprint already displayed, display another sheet labeled at the top "BROADENING UNDERSTANDING AND EXPERIENCE." Ask the group what types of new experiences and understandings of institutions (such as political, economic, social and cultural systems) can be gained in the process of organizing. List their responses on the third sheet of newsprint.

Sample responses are:

- Contacting other groups with similar issues to learn from their experience (linking your personal experience with others, sharing struggles)
- Going to unfamiliar situations like a meeting of the state legislature
- Meeting new people who share common values
- Viewing and discussing films, reading books and newsletters about other organizing efforts
- Attending conferences and training sessions
- Learning about and respecting our own rights and the rights of others
- Learning about other issues both within the group's community and outside of it and discovering how various issues relate to each other and how issues fit into a broader economic and political context
- Learning how local issues are often connected to state, regional, national and international concerns
- Learning about and exercising various democratic rights such as voting, obtaining public records, attending public meetings, holding government officials accountable, etc.
- Learning about and shifting power relationships
- Developing a tolerance and respect for other people who may be different from you
- Learning about power structures, political and economic systems and how these affect people.
- Expanding your values and sense of justice
- Looking at and understanding different perspectives

[Note to Facilitator: Some of the above skills fit and can be listed in more than one of the three categories. List skills under the categories suggested by the participants.]

(4) Clarifying the roles of members, leaders, organizers and technical experts
{20 minutes}

Explain to the participants that this exercise is designed to help them think about what the roles of various people involved in organizations are. On a piece of newsprint, draw a slashed vertical line down the middle of the page. Then draw a solid horizontal line across the center of the page, dividing the page into four quadrants. At the top of the top left quadrant, write the heading, "MEMBERS" on the top right quadrant, write the heading "LEADERS" on the bottom left quadrant, write the heading "ORGANIZERS" and on the bottom right quadrant, write the heading, "EXPERTS." (The facilitator may want to have this chart drawn in advance to save time. See illustration below.)

Begin by discussing members. Ask the group: "That do members do?" Have the group give some brief responses. List these on newsprint under the heading called, "MEMBERS." Then ask what leaders do. List the participants' responses on newsprint under the heading called, "LEADERS." Next, ask what they think the role of an organizer is, explaining that, for this discussion, an organizer is someone one from outside the local community being paid by the organization. List the participants' responses on newsprint under the heading called, "ORGANIZERS." Finally, ask what the

role of technical experts (Such as lawyers and consultants) is. List the responses on newsprint under a heading called, "TECHNICAL EXPERTS."

A sample list of responses may include:

MEMBERS

- Do the group's work
- Provide a power base
- Vote on matter
- Attend meetings & events
- Participate in activities
- Pay dues
- Celebrate
- Identify issues
- Elected leaders

LEADERS

- Develop new leaders
- Delegate work
- Motivate & inspire
 - Coordinate activities
- Encourage involvement
- Provide direction
- Supervise staff
- Speak for organization
- Plan meetings & events
- Hold people accountable

ORGANIZERS

- Facilitate training sessions
- Identify & develop leaders
- Make referrals, suggestions
- Help group develop strategy
- Do reports for organization
- Group troubleshooting
- Analysis, research
- Planning evaluating

TECHNICAL EXPERTS

- Provide advice
- Provide information
- Legal representation
- Provide credibility
- Work for members

Work for members
Transfer skills
Help protect group

Some key points to bring out in this discussion are:

- A primary role of leaders is to develop other leaders. Another important role is to delegate responsibility
- An organization can (and should) have a variety of leaders. Leaders are not just the elected officers. A successful group has many members with various leadership and organizational skills that may be needed and applied at any given time.
- Members can be leaders if they have certain skill and abilities that are valuable to the organization. For example, a member with a good sense of humor may be one of the group's morale leaders.
- The roles of leaders and members often overlap such as when doing fundraising and membership recruitment—tasks that must shared by everyone.

Once the group has developed a brief list describing the roles of each type of participant in an organization, ask them what people in each role should not do. Some key points to bring out during this discussion are:

- Leadership: Organizers and experts from outside the group should not be leaders of the group. Otherwise, the organizer or expert can be easily singled out by the opposition as an “outside agitator” who is orchestrating the activities of the group. Organizers and experts can provide advice and training so that members of the group develop needed skills.
- Decision-making: Organizers and experts should not make decisions for the group. Only members and leaders, by a democratic process, should make decisions. Organizers and experts can make recommendations but the member and leaders should make all final decisions.
- Speaking for the group: Organizers and experts should not speak for the group. Only leaders and members who have been designated by the group to act as spokespersons for the group. (The facilitators may want to mention that KFTC believes that staff should not speak to the media. If they do, this indicates something has gone wrong, in which case, the KFTC chairperson must be notified within 24 hours. This assures direct accountability by the staff to the membership)
- Expertise: Technical experts' advice to groups should be limited only to their area of expertise. A lawyer, for example, should provide legal advice but should not tell the group what its organizing strategy should be.

It should be clear from this discussion that there is a very distinct line between organizers/experts and members/ leaders, hence the solid horizontal line drawn on the chart. The distinction between members and leaders is less defined because often their roles overlap hence the slashed vertical line on the chart. Pointing out these lines on the chart to the group is a good way to reinforce this.

(5) KFTC's leadership development and organizing assistance programs
{20 minutes}

The facilitator should explain how KFTC can support local organizing efforts and how members of local organizations can benefit by becoming actively involved in KFTC. The facilitator (or a volunteer prepared ahead of time) should provide whatever amount of orientation to KFTC is needed, such as briefly describing KFTC's structure, staff resources, past successes on developing leaders. If the participants are part of a new local group, it would be helpful for the facilitator to describe the success of another local group was once in a similar situation.

Explain that KFTC's places a high priority on developing leaders. KFTC's Organizing staff is prepared and available to facilitate a number of leadership training sessions. These sessions are designed to be participatory, educational lively and fun. Mention that the facilitation style used in this session ("Why Organize") illustrates KFTC's training style. Point out that a basic belief of KFTC's is a deep respect for the knowledge of members and their ability to learn from each other in a supportive environment. That is why KFTC facilitators do not lecture and encourage participants to throw their shoes at them if they do!

Display a simple chart as a visual aid to describe KFTC's leadership development and organizing assistance programs. Refer to the lists developed in the Methods Section #3 and explain that KFTC can conduct formal organizing training sessions with the group to help them develop skills such as how to recruit members, run meetings, develop strategy and tactics, elect officers, etc. Describe other training sessions KFTC can conduct to help people develop skills not included on the lists. If available pass out a description of KFTC's leadership development training sessions when distributing other KFTC literature at the end of the session.

In addition to conducting formal leadership development training sessions, explain other forms of organizing assistance KFTC can provide, such as technical assistance, research, lobbying, publicity, referrals and legal representation. Explain that, when requested, KFTC's limited resources may be made available to KFTC members and local groups at the discretion of the KFTC steering committee.

Emphasize that the amount of resources KFTC provides to a local group depends on the amount of involvement of local people in KFTC activities. Another point to stress is that KFTC makes an investment in people, not just in issues. KFTC is especially interested in people and local groups with the potential for transforming short-term concerns into long-term commitments, becoming involved in a variety of issues and broadening their focus beyond their local community.

Pass out KFTC literature such as current newsletters, pamphlets, membership envelopes and a description of KFTC leadership training programs.

PRODUCTS/ OUTCOMES:

- (1) List of reasons why organizing is important
- (2) Practice articulating to others the importance of organizing
- (3) A list of basic organizing skills and activities associated with the three basic

goals of organizing (winning issues, building the group and broadening members' experiences and understanding of institutions and systems which affect their lives and the lives of others)

(4) Lists clarifying the roles of members, leaders, organizers and technical experts

(5) An orientation to KFTC's leadership development and organizing assistance programs

[Note to facilitator: At the end of the training session, remember to distribute the KFTC literature described in the Methods Section #4.]

MATERIALS:

Newsprint, markers, easel, tape, paper and pens for each small group and KFTC literature (such as current newsletters, pamphlets, membership envelopes, a description of KFTC leadership training programs and a chart to use as a visual aid in describing KFTC's leadership development and organizing assistance programs.