

**INQUIRY WORKSHOP GUIDELINES-2019 UCORE Conference**  
**July 29-31, Philadelphia**

- All workshops will be facilitated with a set of questions. Sample questions are offered below, but should be adapted by the facilitator based on dialogue in the workshop.
- The facilitator should strive to:
  - Show radical respect for every participant, regardless of experience and/or knowledge;
  - Keep all participants focused exclusively on lived experience and interpretation of experience... not on general theory or beliefs;
  - Keep the dialogue focused on the stated question. Adamantly limit slippage to other topics.
  - Ask, and encourage participants to ask questions that more concretely ground the experience that is being shared;
  - Rather than seek common experience, try to seek common “lessons learned” among participants;
  - Relentlessly push past complaining and hopelessness towards... what wasn't done, what could have been done, what can be done next time.
  - Focus on telling stories- encourage folks from all different caucuses to share their stories

**First Round of Inquiry Workshops - Build the Base, Build the Power**

**1. Mapping your universe of potential members**

- What is your current level of membership and engagement with your caucus?
- What is your goal in expanding your own membership?
- What experience does your caucus have so far in recruiting members? What venues and conduits have you created?
- How are your potential members *already* organized? What are the ways in which they group or identify? What are the ways your employer organizes them?
- What are the ways in which you can map a single building or other subset of your universe? What are the models?
- Who are your fellow union members? How can you get that information? What information can you gather *beyond* just names?
- How can you organize this information once you have created it? What makes sense at the building, regional, union chapter-wide level?

**2. Identifying and developing rank & file organizers**

- What is your understanding of power and how it works in your school district / universe?
- Do you currently have an organizing mindset in your caucus? If yes, how has it manifested itself? If not, what other approaches have you taken?
- Do you currently have an activist mindset in your caucus?
- How have leaders come into your caucus so far? Are your leaders organizers? What's the difference between a leader and an organizer?

- Who are the organic leaders in your universe of members -- that aren't already yet plugged into your work? (Why aren't they plugged in?)

### 3. **Centering race in base-building**

- What conversations are your members having about race, if it at all?
- What materials or resources are members of your caucus using to have honest and generative conversations about race, racism, whiteness, and white supremacy?
- Describe the conversations that members of your caucus are having about race? What brought you to this point? What changes need to be made?
- How are you having conversations with members of your caucus around building power around building an anti racist caucus?
- How do we make sure that centering race in base building translates to centering race in holding union leadership?
- How do you combat tokenization in building and developing a cadre of leaders of color?
- What tensions come up when you center race? What opportunities emerge when you center race?
- How does your caucus engage parents, students, community members, and members of other unions, and higher ed leaders around centering race?

### 4. **Building a caucus/rank & file base in non-CB (collective bargaining) states**

- What percentage of your co-workers are union members? How do people become members? What do you think is the general attitude of your co-workers towards the union?
- What role does the union play with salaries and education legislation at the state level? What role does it play at the local level?
- What are some ways that you've helped people come to a new understanding of what it means to be in a union?
- What experiences have led you to see the need for a caucus?
- In your town / state, what issues bring people together or cause them to be active?
- What changes are people wanting to see in the local / state union? What are their ideas for making these changes? How can building a caucus help further these?
- How do you identify people with whom you share similar goals / visions for the union?

## **Second Round of Inquiry Workshops - Caucus & Union**

### 1. **Building a caucus/rank & file base under hostile union leadership**

- What is the concrete evidence of anti-caucus hostility from your union's current leadership? Does it show up in informal ways (nastiness, gossip, whisper campaigns, attacking your legitimacy, accusing the caucus of divisiveness, etc), and/or in formal ways (denying access to information, conducting closed meetings, challenging eligibility for office, manipulating election protocols, etc)?
- What do you observe are the effects of the anti-caucus hostility on your caucus leadership, on caucus members, on general union membership? Have the attacks strengthened or weakened your ability to recruit caucus members, articulate caucus goals, move caucus program?

- What has your caucus done to address the hostility? Which strategies focused on incumbent leaders, which strategies focused on caucus members, which strategies focused on general union members? What were the goals of these strategies? Which worked? How do you know?
- What is your understanding of where the hostility comes from (what is its motivation)? Are there possible areas of shared work, compromise, collaboration with incumbent leadership? Are there options for replacing current leadership, or must it be lived with? What are the strategy options open to you given the responses to this set of questions?
- What is the personal impact of this hostility on caucus leaders and members? How have you been able to support one another through the attacks? Has the hostility contributed to divisions within the caucus? Have you found ways to effectively address those divisions?

## **2. How the caucus/rank & file base moves a program when not holding union leadership -**

- How do you decide what campaigns to run? Where do you look for ideas around issues beyond surveying members? How do you make democratic decisions about what issue to focus on?
- How specific should an issue be? For example, should a campaign focus on building conditions, or just mold?
- How do you start to organize people around the issue? What materials do you use?
- What are the different levels of internal organizing that involve the campaign? How do you create structures for 1-1 conversations with activists; having 1-1 conversations with leaders, developing activists and leaders to hold meetings in their school buildings?
- What are the kinds of external organizing that target specific people and places that will have impact and allow you to win (school board meetings, administrators, pieces in the press, online/social media content, elected officials in the form of memes, etc.)
- How do you engage your union leadership around the issue, if at all? How do you engage elected officials, if it at all? Are our political or elected officials allies or targets in your campaign? What opportunities or threats are there to your own campaign if union leadership moves on the issue as well?
- What are the creative and/or visual tools that can both generate deep organizing conversations (for example, a petition with 3,300 signatures on it?)
- How does your campaign engage community members, members of other unions, parents, and students?
- How do you “claim the win?”
- How can you connect your issue or campaign connects to a contract fight?
- How does your campaign build your structures, your base, and your leadership?

## **3. Getting ready and running for union office**

- If you’ve run caucus candidates for office, why did you choose this strategy for transforming the local? What other strategies had been tried? What was your assessment of the effectiveness of those strategies?
- What research did you do before deciding to run candidates? Did you study earlier union elections? Did you study the policies and protocols within the local (and the parent affiliate) for candidate eligibility, nomination procedures, the role of nominating committees, regulations on campaigning, use of union media for campaigning, voting procedures, election oversight processes, appeals for election violations, etc. Did your research shape your strategies? Did your lack of research affect the outcome?

- Do you have an internal caucus procedure for recruiting, nominating, and slating candidates? If so, what is your assessment of it? If not, what would be the difficulties in developing such procedures?
- In your experience, what are the qualities you're looking for in candidates?
- What has your experience been in helping candidates to develop (their knowledge of issues, their ability to speak, their ability to listen, their technical/cultural knowledge of the union, etc)?
- What is your experience in identifying, tracking, and mobilizing voters? What have you learned about different approaches to sub-categories of voters? What has been most effective in broadcast and narrowcast methods of communication?
- Did you have a GOTV strategy? What is your assessment of its strengths and weaknesses?
- Did you encounter campaign or election malfeasance or manipulation from incumbents? If so, how did you address it? Did you need to protest / appeal to a higher union affiliate? What was the procedure?

#### **4. Where the caucus holds power... what's the role of a caucus?**

- How have you defined the role of the caucus during periods when caucus leadership holds union power? Was it explicitly discussed and planned for, or just subject to events? Has it changed over time? What has worked best, in your experience, about the relationship between the caucus and union leadership? What have been the problems? How have you tried to address them?
- Is there a clear idea of the relationship between the caucus and elected union leadership? Are elected leaders expected / encouraged / required to participate in the caucus? How have you grappled with questions of accountability between the caucus and elected union leadership?
- How can the caucus provide broader political leadership within the union? What role should it play in strategic planning, political education, preparing union candidates, etc.?
- Given that former caucus leaders usually take top union positions, what steps can the caucus take to grow new leadership?
- How can the caucus counter the inevitable top down tendencies within the union leadership without being "oppositional"? To what extent, if any, should the caucus distinguish itself from the union leadership?

### **Third Round of Inquiry Workshops - Power to Do What?**

#### **1. Making the union more democratic, participatory, and militant**

- In what ways have you built rank and file leadership at the school and local union levels before and, where applicable, after taking union leadership?
- What are the obstacles inside your union towards greater member participation and access to decision-making? What have you tried to overcome those obstacles? What's worked?
- What experience have you had with using existing union leadership bodies (school based union committees, rep assemblies, Executive Boards, State Councils, etc.) to build member participation and strategic leadership?
- What political educational programs can the caucus and/or the union implement to develop rank and file consciousness and participation?
- What are the blocks inside your union to taking more militant direct action on issues? Where are decisions made about which actions will be taken? Are there ways you've been able to broaden decision-making on campaign strategies and tactics?

## **2. Economic Justice - funding, distribution, anti-privatization**

- Given the distribution of power over public education funding in your state, what are the implications for local and state organizing?
- What has your experience been in bringing union / caucus members into direct organizing on issues of funding, distribution and anti-privatization?
- What kinds of political education did you try to help members get up to speed on these issues? What approaches were successful? Which ones didn't work?
- What approaches did you take to elected officials? Did you work in coordination with your parent union or independently? What is your assessment of the effectiveness of these tactics?
- What have your experiences been building coalitions that address funding, distribution, privatization, and other community needs? What have been the challenges and opportunities?
- How does your local / state caucus address the issue of political power? In addition to strikes and movement building, what else have you tried?
- How does your caucus/union assess the strategy of running for local or state political offices to achieve your goals?

## **3. Working with Students, Parents, and Community Groups for Social Justice**

- What do you personally consider to be the keenest examples of social injustice in your school, and your community? Do you think a majority of your co-workers agree with this? If not, what do you think they would identify? If this is not something you can answer... what steps would you do to find out?
- What kinds of efforts has your caucus, or union, made to address social justice issues? What decision-making process was used to choose the issues? Who was involved? What percentage of the membership were engaged in the decision?
- How have you sought to include parents, students, and community groups in your union organizing?
- How have you sought to support or ally with parent/student/community groups?
- How has the work of parent, student, or community groups come into conflict or tension with your union or caucus? How did you navigate this tension?
- Working with community groups gets a lot of lip service without a lot of practical solutions- how have you worked to take concrete action to support student, parent, and community groups?
- What has your experience been in bringing union / caucus members into direct organizing on issues of equity, dignity and voice?
- What kinds of political education did you try to help members get up to speed on these issues? What approaches were successful? Which ones didn't work?
- Who were the "targets" of your efforts? Were you trying to change school policy or procedures, public policy or law, or consciousness? Were you successful?
- What obstacles have prevented your caucus / union from making progress on these issues? Which of these obstacles are within the power of your group to change? What are the steps needed to build sufficient power to overcome these obstacles?

## **4. Organizing for Racial Justice in our Unions and Schools**

- How and where do conversations about race happen in your caucus/union? How do caucus/union members see the work of the union connected to racial justice?
- What is the relationship of racial justice and social justice unionism?

- How can caucus/union members educate each other from the ground up around racial justice conversations and work?
- How has your caucus/union worked to place racial justice organizing at the center of “the real work”?
- How has your caucus/union organized for racial justice at both the classroom/school level and district-wide/city-wide level?
- What steps & actions can the caucus/union take to support racial justice issues? What is the difference between symbolic vs concrete support for racial justice? How do we add demands and teeth to symbolic support?
- What are the obstacles to discussing and moving issues of racial justice within your caucus/union? Examples?
- In what ways has organizing around racial justice issues affected your caucus/ union? Positive and negative
- How have you navigated the need for “external” work (larger union membership, citywide) vs “internal” work (training, conversation, affinity groups, healing spaces within the caucus)?
- What is the role of race-based affinity groups in supporting racial justice? How have you implemented or envisioned this in your caucus/union?
- What is the role of white anti-racist work in supporting racial justice? How have you implemented or envisioned this in your caucus/union?
- How have the intersections of race with gender, sexuality, age, and class emerged in your caucus/union? How have these affected your organizing? How have you worked to address these intersections?
- What role can caucuses specifically serve in the work to push racial justice within the union? (Whether in power, not in power, contesting power)

## **Developmental Breakouts**

### **Thinking about it:**

- How did you come to connect with each other? What are some of the activities/actions you have done together? As you reflect on these, what are the guiding principles you share?
- What have you done to reach out to others? Do others share your concerns? Principles? How do you know? Are there groups you have not yet reached out to?
- What are your gatherings like - what do you discuss - how do you plan them - who do you invite?
- What do you know about how the union operates - who has power - how they use that power- how the union communicates with members - makes decisions?
- How will your decision as to whether or not to form a caucus adhere to your principles?
- What are your ideas about what the caucus should do? Is there agreement about the main purposes (influencing existing union leadership on programs / procedures; opening up the union; running for leadership; influencing collective bargaining / contract enforcement; raising site-based campaigns; participating in community based campaigns; etc)?
- Do you have agreement about time-line and sequence of development? If so, how did you develop that? If not, how could you develop it?

### **1-2 years experience:**

- How did you come together as a caucus and what are your guiding principles?
- What is a caucus meeting like- how often- who sets agenda- how are decisions made?

- What are some actions you have taken as a caucus? How did you reach agreement to take those actions? What was the impact on the union of these actions? on the caucus?
- Have you faced internal opposition as a caucus- what was the quality of that opposition- how did you respond- how did you decide how to respond?
- What is the relationship of the caucus to other rank and file members- how do you connect with other members?
- Have you grown - and if so what you have done to grow? If not - is that intentional- have there been obstacles- of what kind and how have you addressed these?
- What are some examples of how you have used your power as a caucus? What factors are you considering as you decide when to run for leadership? How will that decision be made?

#### **Developed but not in leadership:**

- In *How to Jump Start Your Union*, we are reminded to '*be the union you want your union to be.*' Give an example of how your caucus has acted as the union you want your union to be- what did you do? what was the effect on the union and the caucus? How is the caucus presenting an alternative way of 'being the union' to members?
- Can you share an example of the processes for reflecting on an action you've taken as a caucus? What did you learn about the caucus and the union from that work?
- Have you run for office/are you planning to run for office? What is the decision making process for running for office and selecting candidates?
- What are the internal protocols of your caucus - do you have a formal membership category, by-laws, regular election of caucus officers, regular communication to caucus members, clear procedures for decision-making? If so, do they work well to include new people, engage members in meaningful ways, hold people accountable?

#### **Holding union leadership:**

- How has the caucus maintained its commitment to democratic processes while holding union leadership? What opportunities have you found to do this? Where has it been a challenge?
- What have you learned about the distinctions between running the union and running the caucus? Can elected union leaders do both? Have you discussed the tensions between these two tasks? Do you have insight about how to manage these tensions?
- Dissident caucuses struggle when they win leadership with adjusting to an inside/outside role - requiring both supporting and pushing the leadership. For those of you who are elected leaders, give an example of how you have supported the caucus to challenge leadership? For those of you not in office, give an example of how you have challenged leadership while maintaining solidarity.
- What work has the caucus done to develop new leaders? to identifying candidates to run for office?
- Are there caucus procedures for nominating a caucus slate for union office? Are they effective at bringing in new members and engaging existing members?

#### **Building rank and file power without a caucus:**

- What processes are in place for rank and file to generate issues, self-organize, and lead fights? What are some examples of actions generated from these processes?
- Do you engage in open bargaining? What has been the impact of open bargaining on membership? If not, what are some places where member voice and leadership can be central to decision making that are not currently being used?
- What are your processes for identifying and developing leaders? Do you have contested elections? If not, what experiences allow membership to learn about its role in choosing the kind of union it wants- and the choices available?

## What is UCORE and what can it be?

- UCORE is a network of local and state caucuses that seek to make our unions democratic, militant, social justice unions that can be leading forces for transformational social and political change in public education and beyond.
- Given that the movement for educational social justice in teacher unions is still relatively new, the primary role of UCORE has been two-fold:
  - To provide a space for a growing number of union activists to share experiences and learn from one another.
  - To provide educational materials and trainings as well as foster critical discussion on the pressing issues facing education activists.
- UCORE has provided considerable face-to-face opportunities for sharing experiences – through monthly video conference calls, regional workshops, and national conferences. This is supplemented by targeted strategy consultations with individual caucuses, either face-to-face or electronically, at times of critical development.
- UCORE has not developed its own issue programs or campaigns, nor attempted to supplant or direct the autonomous development of any member caucuses, but rather to provide spacious and solidaristic environments for such autonomous development to flourish.

Going forward, what needs can UCORE best meet while remaining consistent with past practices and values? Possibilities include:

- Increasing the number of region-specific mini-conferences and caucus-specific strategy sessions to accommodate the significant uptick in teacher union insurgency and caucus formation.
- Convening specialized topic conferences as the need arises (for example, focusing on the relationship between caucuses and leadership in caucus-led unions).
- Establishing an education committee, responsible to the UCORE steering committee, charged with developing materials on caucus building and other related topics for general distribution throughout the network.
- Establishing a communications committee, responsible to the UCORE steering committee, charged with facilitating written cross-caucus communication on key issues for general distribution throughout the network.
- Other...