



Great Public Schools for Every Student

Organizing: Using Data to Identify Problems and Issues

Leader compiles and analyzes data to identify their constituency's problems and issues.

Key Method

The leader compiles different types of data (e.g., qualitative, membership tracking, perceptual) to identify problems their members are facing. The leader conducts a root cause analysis of the problems to clearly identify the issues and determine steps moving forward

Method Components

When leaders identify objectives and build campaigns, they are organizing to solve issues. Leaders must see the issue to identify a solution. To identify the issue, leaders must actively listen to the pain and problems their members are experiencing.

What is a problem and an issue?

A problem is

- something you don't like about the world
- "broad areas of concern"
- terrible things too big or too vague to grapple with, but just thinking about them can be disempowering
- "Pollution" and "crime," for example

In the terms organizers use, an issue

- is a more specific challenge that is pulled out from the larger "problem"
- when done right, always includes the solution or partial solution to a "problem"
- examples: an issue you might "cut" out of pollution might be a campaign to stop a new plant in your community. An issue that one might "cut" out of the "problem" of crime is police accountability, and the solution that some groups are fighting for now are body cameras on all officers.

A leader must also define how to plan to solve the specific challenge they chosen. Organizing around issues and developing plans for solving specific challenges provide associations opportunities to make an impact.

What is data analysis?

Data analysis refers to collecting and analyzing data that is relevant to the goals of an organization or campaign. This could include data about the members and potential members of an organization, survey data from members of an organization, demographic data from the community, and other forms of data. Leaders need different types of data to

identify problems, such as qualitative data (conversations with members, listening tour), membership and leadership tracking data (any database such as IMS, VAN, spreadsheet), polling and perceptual data (surveys, phone banks). Analyzing such data can help leaders determine the capacity for organization that exists in the group. A successful leader who is looking for an issue can look across these types of data to determine whether an issue is valid.

How does a leader use data to identify their constituency's problems?

A leader must first identify their people: teachers, support professionals, parents, and students. What is the pain that's mostly being expressed? How does that make students and educators feel? Understanding the feelings of pain that people experience can provide an opportunity to work toward change.

- The leader can develop a one-to-one conversation script.
 - Effective one-on-one conversations should be focused on you doing 20% of the talking and 80% listening.
 - Engage members in answering questions such as "If you had a magic wand to fix anything in your profession, what would it be? What issues are you facing right now in your own classroom or school building?"
 - Make a note of the issues that were mentioned, preferably immediately after meeting with the member.
 - Before leaving the member, ask who they would consider a trusted and respected professional practice leader. Make sure to write down the name(s) provided.
- The leader can conduct one-to-one conversations and compile data on trusted and respected leaders and professional practice issues.
 - Data can be collected on a data tracking sheet
 - Multiple ways to track data can be used. (i.e., Excel sheet, charts, paper lists)
 - This information should be organized and analyzed to look for trends or common themes in issues.
 - Data should also be saved for future use.

How does a leader move from problem to issue?

After brainstorming about the pain and/or problems your constituency is feeling, identify three issues that are causing the pain. What is specifically contributing to the problem?

What new structures or policies do we need?

How does a leader evaluate issues to build a campaign?

A leader can use and/or develop an issue criteria checklist to score and evaluate each issue. Score each issue from 1 to 3 (1 = No, 2 = Unsure, 3 = Yes) on the specific criteria; then total the scores and compare them with other members on the team. Consider developing criteria specific for the problem your constituency is facing. For example, will the issue result in a real improvement in people's lives? Will the issue be worthwhile or winnable? Other examples include the following:

- Will the issue give people a sense of their own power?
- Will the issue alter the relations of power?
- Will the issue be widely and deeply felt?
- Will the issue have a clear target?
- Will the issue build leadership?
- Will the issue have a clear timeframe that works for you?
- Will the issue be consistent with your values and vision?

After scoring each issue, compare scores with other members on the team. Discuss thoughts and reflections with this team. As a team, identify the one issue that members will seek commitments to solve.

Supporting Research

Montgomery County Education Association. *Relational Organizing Resources: The Art of One-on-One Meetings*.

Rockville: MCEA, 2013. Print.

<http://mceanea.org/wp-content/uploads/sites/12/2014/09/Primer-on-One-on-Ones.pdf>

Bobo, Kimberley A., Jackie Kendall, and Steve Max. *Organizing for social change: Midwest Academy manual for activists*. Seven Locks Press, 2001.

<http://sites.middlebury.edu/organize/files/2014/08/Bobo-Kendall-Max-Organizing-for-Social-Change-Chpts-3-4-5-2.pdf>

Nohria, N., and R. Khurana. *Handbook of Leadership Theory and Practice an HBS Centennial Colloquium on Advancing Leadership*. Boston, MA: Harvard Business, 2010. Print.

Rationale: The researchers found that leaders need to build relationships to create opportunities for interests to grow, change, and develop to change social conditions.

Andrews, Kenneth A. T., Marshall Ganz, Matthew Baggetta, Hahrie Han, and Chaeyoon Lim. "Leadership, Membership, and Voice: Civic Associations That Work." *American Journal of Sociology* 115.4 (2010): 1191-242. Web.

<https://scholar.harvard.edu/hahrie/files/AndrewsEtAl2010.pdf>

Rationale: Researchers discovered that associations with more committed activists, that build organizational capacity, that carry out strong programmatic activity, and whose leaders work independently generate greater effectiveness across outcomes.

National Education Association. *NEA Leadership Competencies Guide*. Washington, DC: 2015. Web.

<https://www.nea.org/assets/docs/CompetencyGuide_2015.pdf>.

Rationale: The competencies are designed to prepare NEA members to lead relevant and thriving education associations and define for our association what leaders should know and be able to do in the areas of professional practice, organizing, advocacy, communications, business, and governance and leadership.

Resources

Problems and Issues:

Cutting an Issue

www.educationaction.org/uploads/1/0/4/5/104537/19--cutting_an_issue-i.doc

Organizing for Social Change: Chapters 3-5

<http://sites.middlebury.edu/organize/files/2014/08/Bobo-Kendall-Max-Organizing-for-Social-Change-Chpts-3-4-5-2.pdf>

Community Organizing Toolkit: Page 6 (Issue Criteria sheet)

http://www.racialequitytools.org/resourcefiles/LCAT_Take_Action_Create_Change_-_Community_Organizing_Toolkit.pdf

Checklist for choosing an issue

<http://www.scorcher.org/screed/pdf/issuechooser.pdf>

Data Analysis:

Schilder, D. (1997). Strategic Planning Process: Steps in Developing Strategic Plans

<http://www.hfrp.org/publications-resources/publications-series/reaching-results/strategic-planning-process-steps-in-developing-strategic-plans>

Balanced Scorecard Institute: Strategic Planning Basics

<http://www.balancedscorecard.org/BSC-Basics/Strategic-Planning-Basics>

Free management library. All about strategic planning.

<http://managementhelp.org/strategicplanning/index.htm#anchor1234>

One-on-ones:

AHUEY sample

<http://www.labornotes.org/sites/default/files/23AHUY.pdf>

An Organizing Conversation

<http://www.labornotes.org/sites/default/files/22AnOrganizingConversation.pdf>

Relational Organizing Resources: The Art of One-on-One Meetings.

<http://mceanea.org/wp-content/uploads/sites/12/2014/09/Primer-on-One-on-Ones.pdf>

Building Relationships and Identifying Leaders:

The Teacher Leadership Competencies

http://www.nbpts.org/sites/default/files/teacher_leadership_competencies_final.pdf

Leading Change: Leadership, Organization, and Social Movement

<http://marshallganz.usmblogs.com/files/2012/08/Chapter-19-Leading-Change-Leadership-Organization-and-Social-Movements.pdf>

The Practice of Social Movement Leadership

<https://mobilizingideas.wordpress.com/2017/06/23/the-practice-of-social-movement-leadership/>

Submission Guidelines & Evaluation Criteria

To earn the micro-credential, you must receive a passing score for Parts 1 and 3 and “Proficient” for each component in Part 2

Part 1. Overview Questions

500 word limit

1. Please answer the following: (500-word limit total)

- a. Describe the recent history of your local affiliate or worksite, including changing contexts (both internal and external) to explain the current climate.
- b. What are the strengths and weaknesses of the local affiliate or worksite?
- c. Describe methods you have used to engage members.

- **Passing:** Educator completely answers each of the three questions using examples and supporting evidence. Writing is organized and easy to understand.

300 word limit

2. Write a response identifying three issues your constituency is facing (300-word limit). Address the following in your response:

- a. What is the pain that's mostly being expressed?
- b. How does that make students and educators feel?
- c. What is specifically contributing to the problem?
- d. What new structures or policies do we need?

- **Passing:** Explicitly identifies the following: three issues faced by the leader's constituency, problem/pain felt by constituency, impact on students and educators, and new policies or structures needed. Grammar, spelling, and sentence structure enhance clear communication.

Part 2. Work Examples / Artifacts

To earn this micro-credential, please submit the following artifacts:

Artifact #1:

Use an issue criteria checklist (with at least 10-15 criteria; see resources) to score each Issue from 1 to 3 (1 = No, 2 = Unsure, 3 = Yes) on the specific criteria, and then total your scores.

Artifact #2:

Conduct 4-6 one-on-ones to test out the issues you identified. Upload **one** of those conversations on video (total of 10-20 minutes). For each conversation, write a reflective critique and include your thoughts on problems your members are facing at their worksites. (300-word total limit)

Artifact #3:

Conduct a survey or phone bank to compile data for a targeted group of educators (minimum of 20-30 members) to test out the issues you identified. Submit the list of questions asked and the data compiles to the educators.

Artifact #4:

Write an analysis of the data you collected. Reevaluate the issues you identified for artifact #1. What is now the one most pressing issue that your members would seek a commitment to resolve? In your analysis, include common themes, methods used to compile data, and a reflection on your constituency's problem and issue. (600-word limit)

null	Proficient	Basic	Developing
Artifact #1 Issue criteria checklist	<p>Completed an issue criteria checklist and scored each issue from 1 to 3.</p> <p>Issue criteria checklist has at least 10-15 criteria.</p>	<p>Issue criteria checklist is incomplete.</p> <p>Issue criteria checklist has fewer than 10-15 criteria.</p>	<p>Issue criteria checklist is incomplete.</p> <p>Issue criteria checklist has more or fewer than 10-15 criteria.</p>
Artifact #2 One-on-Ones	<p>Video is clear and easy to understand and contains a one-on-one conversation focused on identifying the educator's problems and issues.</p> <p>Written responses are easy to understand and relevant to the information being sought.</p> <p>Written reflective critique for each conversation (4-6 one-on-ones) with thoughts on problems or issues members are facing at their worksites.</p> <p>Grammar, spelling, and sentence structure enhance clear communication.</p> <p>Less than 300 words.</p>	<p>Video is clear and easy to understand and contains a one-on-one conversation that does not clearly identify the educator's problems and issues.</p> <p>Written responses are easy to understand; some information may be irrelevant.</p> <p>Written reflective critique for each conversation (4-6 one-on-ones) with thoughts on problems or issues members are facing at their worksites.</p> <p>Grammar, spelling, and sentence structure allow for clear communication.</p> <p>300-word limit or more (150+ per entry).</p>	<p>Video lacks a clear message. Video contains conversations that are difficult to listen to. Questions may not be clearly stated.</p> <p>Written responses are difficult to read and contain excess information that is irrelevant.</p> <p>Written critique reflects on fewer than 4 conversations on problems or issues members are facing at their worksites.</p> <p>Grammar, spelling, and sentence structure may inhibit clear communication.</p> <p>300-word limit or more (150+ per entry).</p>
Artifact #3 Data Collection	<p>Data is organized, and it is easy to follow and find information. All information is listed, including details regarding the identified issues.</p> <p>Script is easy to understand and follow.</p> <p>Grammar, spelling, and sentence structure enhance clear communication</p>	<p>Data is organized. Some information may be missing.</p> <p>Grammar, spelling, and sentence structure allow for clear communication.</p>	<p>Data is unorganized and not easy to understand. Information is incomplete.</p> <p>Grammar, spelling, and sentence structure may inhibit clear communication.</p>
Artifact #4	Analysis includes	Analysis may include	Analysis lacks explanation

Data Analysis

explanation of data collected, reevaluation of issues identified, identification of most pressing issue for members and common themes, explanation of methods used, and reflection on constituency's problem and issue.

Grammar, spelling, and sentence structure enhance clear communication.

Less than 600 words.

some but not all of the following: explanation of data collected, reevaluation of issues identified, identification of most pressing issue for members and common themes, explanation of methods used, and reflection on constituency's problem and issue.

Grammar, spelling, and sentence structure allow for clear communication.

600-word limit or more (150+ per entry).

and details for the following: data collected, reevaluation of issues identified, identification of most pressing issue for members and common themes, explanation of methods used, and reflection on constituency's problem and issue.

Grammar, spelling, and sentence structure may inhibit clear communication.

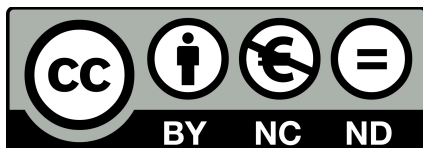
600-word limit or more (150+ per entry).

Reflection

600 word limit

Write a reflection on how these experiences have affected your current practice as a leader. Address the following:

- What did you notice from collecting data on the pain and/or problems your members are feeling?
 - What challenges did you face in collecting this data?
 - Compare your organizing skill level before and after this process. What did you learn from the process?
 - How will these skills help you in leading your local?
- **Passing:** Response thoughtfully reflects on the process and addresses the impact on the leader's current practice using personal examples and supporting evidence. Reflection is relevant to the micro-credentialing process. Writing is organized and easy to understand.



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