

CULTURE CHANGE TRAINING: ADDRESSING UNWANTED BEHAVIORS IN OUR MOVEMENT

DECEMBER 2018

AFL-CIO

AMERICA'S UNIONS

CULTURE CHANGE TRAINING: ADDRESSING UNWANTED BEHAVIORS IN OUR MOVEMENT

LEARNING OBJECTIVES

After the session, participants will be able to do the following:

- Confidently and effectively intervene when witnessing interpersonal behavior that is unhealthy workplace behavior:
 - Interventions will respect individual autonomy; and
 - We will recognize different forms of power vis-à-vis depending on the situation and type of intervention.

MATERIALS AND LOGISTICS

This culture change training will take **two hours (exclusive of the video)**, divided as follows:

Welcome, Introductions, Goals and Group Agreements	10 minutes
Affirm Union Values Pair Share	10 minutes
Values + Practice Brainstorm	5 minutes
Five Steps of Bystander Intervention/Worksheet	20 minutes
3 Ds of How to Intervene	5 minutes
Video (<i>In development</i>)	5 minutes
Applying the 3 Ds	10 minutes
Practicing Interventions Improv Theater Exercise	30 minutes
Debrief and Discussion of Power	20 minutes
Conclusion and Commitments	10 minutes

Note that timing will be tight. If you have the opportunity to do this workshop in more than two hours, take it. More time allows for richer discussion.

You will need the following materials:

- Flip charts and markers
- Paper and pens for participants
- System for keeping time (timekeeper, watch)
- Computer, screen and WiFi to play video

There will be three **handouts** you will need to have ready:

- Is This a Problem? Worksheet
- 3 Ds of How to Intervene
- AFL-CIO Code of Conduct Cards (customized cards may be ordered from www.wftoolkit.org; once logged in, you can search for “Code of Conduct” and you will be able to create cards customized to your organization)

This session can be done in any kind of room and does not require breakout spaces. It will be best if there are round tables for people to easily separate into small groups for discussion. The role-play exercise works best with chairs assembled in a circle.

Reference materials are available at the end of this guide:

- AFL-CIO Code of Conduct Toolkit:
go.aflcio.org/codeofconduct-resources
- AFL-CIO Resource Page on Sexual Harassment:
<https://aflcio.org/issues/sexual-harassment>

You will see two types of print in these Trainer Notes.

Print Like This Will Be Training Tips

Or suggestions for how to conduct the training. It will be in a box apart from the main flow of the page. Read these tips before you conduct the training to get ideas of how to handle various parts of the session, what to expect and various situations that might come up.

Print Like This Will Be Trainer Scripts

That is, words that can be read aloud to the group as you lead the training. As you become familiar and comfortable with the training materials, you will make the words your own—you do not need to use our scripts! The scripts are available here so you can see how a trainer might introduce something, make a transition or stimulate a conversation. You should always feel free to put any of this into your own words, and into words you think will resonate with the particular group you are leading through the workshop.

The Importance of Introductions

Be sure to practice the introduction in order to avoid reading from your script. This is one of the opportunities you will have to establish yourself as a credible facilitator; few things do that better than a solid introduction.

About Credentials

Let people know why you are qualified to lead this session:

“I’ve been a part of the labor movement for eight years and have seen a lot of people love the union but leave activism because the environment wasn’t welcoming to them.”

“I’ve been on the giving end and receiving end of jokes that went too far.”

The goal is to position yourself as knowledgeable, without boasting or claiming unnecessary expertise. Why are you at the front of the room?

Trainer Note

It works best if you have these goals already written on a flip chart at the front of the room.

Setting the Tone

This workshop covers topics that can be uncomfortable for some individuals, or even elicit an emotionally charged reaction. As the instructor, your job is to encourage open dialogue while ensuring the conversation remains respectful and productive.

Come prepared with a response for individuals who may be triggered over the course of the workshop. For example, designate a trusted leader to follow up with anyone who leaves the room suddenly, and check in afterward with participants who appear especially upset.

That said, emotions are OK and it’s best to acknowledge them and move the curriculum forward. As facilitators, we are neither group therapists nor individual problem solvers during this session. We want to set a tone of healthy feedback.

WELCOME, INTRODUCTIONS, GOALS AND GROUP AGREEMENTS

10 MINUTES

Welcome to this workshop on changing the culture of our union. My name is **[Insert name]** and this is my co-facilitator **[turn to co-facilitator to introduce himself/herself/themself]**.

We'd like to go around the room and ask each of you to introduce yourselves by giving your name and region, and one word that describes your best quality as an activist/staff/leader.

As leaders of organizations, we want people to want to be a part of the movement we're building. To live our motto "An injury to one is an injury to all," we have to figure out how to lead in a way that lifts up those values on a daily basis. This workshop focuses on the interpersonal nature of what we do as leaders. It is a series of conversations and exercises designed to meet the following goals:

1. Help us identify unhealthy workplace behavior that would benefit from intervention.
2. Become more comfortable intervening in ways that both respect individual autonomy, layers of power and our union values.

We're here to explore the ways we can support one another in building a healthier organization that lives up to our values. We intend to build upon the AFL-CIO Code of Conduct by thinking of this session in the framework of unwanted behaviors. We want to address these unwanted behaviors, ideally, BEFORE they reach a level of harassment. Research supports this approach and we really want this session to allow for us to practice techniques that can be used in the spirit of helpful feedback and awareness of power dynamics.

WELCOME, INTRODUCTIONS, GOALS AND GROUP AGREEMENTS

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ASK PARTICIPANTS FOR AGREEMENT ON THE GOALS

While this is not a training on the Code of Conduct, let's start this session by reading the Code of Conduct, just as we would at an AFL-CIO-sponsored function.

To reach our goals in this short time together, it's good to have group agreements to guide our session. We've come up with the following:

Group Agreements

- **Listen.** It is very important to really listen to what your fellow participants are saying. Give each other the space to talk and take in what we are learning. Try not to interrupt.
- **Keep an open mind.** We all have opinions and things we believe, but don't be too quick to dismiss ideas that might be different from yours. We all see power differently, and these discussions may trigger some people to think of situations similar to the scenarios we'll be covering.
- **Assume good intentions.** In that vein of keeping an open mind, it helps our conversation if we assume that another's intentions are good. Sometimes we just need to ask for clarification when something doesn't land well with us. Other times, it requires a healthy debate.
- **Value your own experience.** It is important to keep an open mind, but don't forfeit what you know, feel or believe. Have confidence in who you are.
- **Step up, step back.** If you find yourself shy and contemplative, push yourself to step up and contribute to the conversation. If you are feeling very talkative, step back to allow others the space to contribute.
- **Confidentiality.** All participants must feel safe to participate fully. For this reason, the comments made over the course of the workshop should not be repeated outside of the room. Furthermore, it's important to respect the privacy of all members of our community and avoid explicitly discussing actual or alleged instances of harassment and discrimination.
- **Cell phones on silent.**

Are there any other group agreements you need to help facilitate our time together?

Trainer Note

Have the question already written on the flip chart at the front of the room:

WHAT ARE OUR UNION VALUES?



Trainer Note

Write down responses on the flip chart below the question. Circle or put an asterisk by the most common answers. Post the page on the wall.



AFFIRM UNION VALUES

10 MINUTES

Instructions:

Turn to the person next to you and take three minutes to list out your answers to this question:

WHAT ARE OUR UNION VALUES?

Now, let's take volunteers and hear our thoughts:

What do you think are the common themes of this discussion?

Summary (one minute):

We may think of union values in terms of solidarity, unity, fairness, equity, justice, respect or more. What we know is that we can affirm to one another that we want our movement to live up to these values.

Trainer Note

Have the question already written on the flip chart at the front of the room:

WHAT PRACTICES MAKE A HEALTHY WORKPLACE?



Trainer Note

Write down responses on the flip chart below the question. Post the page on the wall next to the one on union values.



VALUES + PRACTICE = HEALTHY WORKPLACES

5 MINUTES

Let's talk about this in the context of our own work/workplaces and think big about the practices you think make it healthy. Stay away from organizational policies and think more about interpersonal behavior and work culture.

WHAT PRACTICES MAKE A HEALTHY WORKPLACE?

[Gather responses and record on a flip chart.]

Summary:

So when we compare what we said about union values with what we think makes a healthy workplace, what patterns do you see? Are we putting our values into practice?

FIVE STEPS OF BYSTANDER INTERVENTION

Trainer Note

Have the five steps already written on the flip chart.



FIVE STEPS OF BYSTANDER INTERVENTION

20 MINUTES

So what happens when any of us acts in ways toward one another that may be out of line with either our movement values or our ideas of what it takes to build a healthy organization?

Do we speak out, coach, encourage, offer feedback, contemplate?

Or do we accept, move on and hope that the same behavior won't happen again?

All of this is based in context, so we won't be discussing generalizations—just keep in mind what we've come up with so far on the flip charts.

We're going to turn our attention to learning the steps of bystander intervention. While the steps we describe are just as applicable to a situation you view on the street or the subway, for our purposes, please think of it in the context of our work...meetings, conventions, door knocks, etc.

Think of it in five sequential steps:

1. Notice the event
2. Interpret the event as a problem
3. Take personal responsibility to address or intervene
4. Decide how you are going to address or intervene
5. Address or intervene

Distribute Handout

Is This a Problem? Worksheet



IS THIS A PROBLEM?

Instructions: Write YES or NO next to each question.

1. You and a handful of others receive an email from a state federation president boasting of a recent legislative victory. Thanks to the hard work of the state federation's campaigns director, Jerome Wright, the coalition has successfully beaten back a bill that would be disastrous for working families. In his email, the president refers to the campaigns director as "Jamal," actually the name of the operations manager and the only other African American man on staff. Others reply to the email thread with short messages of "Congrats!" and "Great work!" However, no one corrects the president's mistake.

- Is this a problem?
- Do you intervene?

2. You're in a planning meeting for an upcoming event. There's a debate about what kind of outside speaker to invite and how that will affect the overall theme and tone of the event. Lin, a young Asian American organizer, makes a suggestion and no one really seems to notice. The very next speaker takes the conversation in a completely different direction, and her point is lost. A few minutes later, Joel, the political director, makes the same suggestion that Lin had made, and many other people in the meeting step in to affirm this idea and credit him with having such an innovative solution to the problem at hand. Lin appears unfazed.

- Is this a problem?
- Do you intervene?

Noticing is not to be underestimated. We're busy people and sometimes we just don't notice everything. Let's try to be more vigilant and think about how we treat one another.

Interpreting the event as a problem. This is where our personal and movement values come into play. And, so does the individual autonomy of someone if you yourself may not be the recipient of unwanted behavior. So how do you know what is unwanted? [**Take a couple of ideas.**]

Taking personal responsibility to address or intervene. This is where courage comes in.

Deciding how you are going to address or intervene. We're going to get to these choices in a few minutes, then practice some scenarios that can help us be more mindful about HOW we respond.

Address/intervene. Did your intention have the impact you desired?

We're handing out a worksheet that gets us thinking about whether or not something is a problem. Take a few minutes to read the scenarios and ask yourself, "Is this a problem?" Write YES or NO next to the paragraph.

Now, at your tables or in groups of five to six people, take five minutes to discuss your answers. Choose a reporter who will synthesize the group's consensus or majority opinion for each questions.

Summarize the discussion for a report-back to the full group. Take no more than eight to ten minutes total.

Distribute Handout
How to Intervene: The 3 Ds

**HOW TO INTERVENE:
THE 3 DS**

After you've decided you need to intervene, there are many ways to go about it. It's helpful to think of it as the 3 Ds.

Direct

Directly intervening, in the moment, to prevent a problem situation from happening; the art of feedback is key here. We want our union siblings to change behavior, so we need to think about feedback that could help with that. Only you know the person and what he/she may respond to—as well as the context—so this could range quite a bit. If you cannot speak up in the moment, give direct feedback or check in with the target of unwanted behavior afterward.

Delegate

Seeking help from another individual, often someone who holds a position of power. While our Code of Conduct has specific point people who have been trained to investigate complaints, when we're talking about day-to-day work situations, we may not have that person present, and we know that we need to act immediately.

Distract

Interrupting the situation without directly confronting the offender. Some people can tell that things are escalating and decide to use humor or interruptions to move themselves or another person out of a sticky situation.



3 DS OF HOW TO INTERVENE

5 MINUTES

After you've decided you need to intervene, there are many ways to go about it. It's helpful to think of it as the 3 Ds.

Direct—Directly intervening, in the moment, to prevent a problem situation from happening; the art of feedback is key here. We want our union siblings to change behavior, so we need to think about feedback that could help with that. Only you know the person and what he/she may respond to—as well as the context—so this could range quite a bit. If you cannot speak up in the moment, give direct feedback or check in with the target of unwanted behavior afterward.

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Distract—Interrupting the situation without directly confronting the offender. Some people can tell that things are escalating and decide to use humor or interruptions to move themselves or another person out of a sticky situation.

VIDEO

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VIDEO

5 MINUTES

Video is in development and will feature problematic behavior(s) in a union context. The intent will be to discuss ways to intervene when there are power dynamics at play.

Trainer Note

Feel free to write your own scenario to fit the audience and the type(s) of unwanted behavior you'd like to address.



APPLYING THE 3 Ds EXERCISE

(COULD BE MADE SHORTER IF YOU CHOOSE TO NOT DEBRIEF)

10 MINUTES

At your tables, take a few minutes to discuss what you would do in the following situation.

[READ SCENARIO]

Which of the 3 Ds or a combination thereof would you employ, and why?

You are at the Sporty Alliance dinner with your central labor council, which happens to be quite large and can afford to bring several members of the executive board (you are a delegate). Matt, a national field staffer, is invited by a large CLC president, Phil, to be a guest at the table they bought for the Sporty Alliance dinner. Matt goes, despite not being much of a hunter or angler, because he really wants to build deeper relationships with the e-board/affiliate activists who also are attending. Matt happens to win a door prize and it's a new gun. He has no interest in owning a gun of any type and asks whether someone at the table would like to have it instead. Mark and Jane eagerly say "yes!" and then the CLC president turns to Matt and says, "Geez, now you've gotta choose between my VP and my treasurer. Aren't you man enough to keep a gun?"

Is this a problem?

Do you intervene?

[After four minutes, do a quick two-minute debrief of volunteers.]

Trainer Note

This exercise requires one facilitator per 10 people or less. Prepare an open space in your room where there are 10 chairs in a circle. If you think participants are fine standing for 20 minutes, then omit the chairs.



Trainer Note

Prepare enough note cards for all participants except the two who will be playing the main characters. The “character cards” should include basic information such as role/title, organization, and/or descriptive information about how outspoken the character may be.



Trainer Note

Be sure to emphasize that this is improvisational theater, not an observation exercise between the two people with a script. Be sure to tell the two volunteers with a script to continue to play their characters even after the script is completed. Let the group dialogue continue for four to seven minutes. Stop the exercise and restart it if no one intervenes when they see a problem. Try to encourage bystander intervention rather than direct intervention on the part of the aggrieved character.



Trainer Note

If you wish to add power dynamics to the mix, make sticker name tags with titles and organizations that participants wear during the exercise.



PRACTICING INTERVENTIONS IMPROV THEATER

30 MINUTES

GOAL:

To practice interventions in real time and debrief their effectiveness

[Ask for two volunteers to sit in two marked chairs (they will receive partial scripts) and invite the others to sit in the remaining chairs. Distribute simple character cards to the remaining participants. Encourage improvisation even if you run out of cards. All should try to participate.]

We're going to add to our original ground rules for this exercise.

1. You need to stay in character. You won't all receive scripts, so consider this a form of improv theater.
2. Two people will be given a script to start out the conversation. Again, this is improv theater. The end is up to you to decide what to do. Remember to listen to what others are saying.
3. The remaining group members have simple roles and may intervene at any time. The goal is to intervene within the context of the situation and your role.
4. Let's go around and introduce ourselves and our titles/organizations.

PRACTICING INTERVENTIONS IMPROV THEATER

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Scenarios: Roleplay No. 1

Instructor to FULL GROUP:

This is a meeting where a man and woman are co-presenting. The man is a leader in your organization, and the woman is a guest who has come to provide specific expertise. Each of our two volunteers gets a few minutes to get comfortable with their roles. They will start with a script but then move into improvisational theater mode. Think of this as “Theater of the Oppressed”—where we learn by acting and practicing responses that fit with our character design.

For the rest of us, let’s be sure to stay within our character description AND intervene where appropriate.

Man/Aaron: As I mentioned to you all over email, for today’s meeting, we have a special guest. Allow me to introduce Kim Baumgarten, the new executive director of the State Policy Institute. She’s a leading expert on economic policy in the state and has spent most of her career fighting for working people in the statehouse. And I think you’ll all agree with me her husband is a lucky man.

Woman/Kim: (Laughs awkwardly.) Haha—well, most of the time.

Man/Aaron: Kim is going to talk to us about Assembly Bill 127, the latest right-wing attack on our ability to organize and win for our members. If Republicans get their way, we can anticipate huge losses in membership, especially among our state employees. So I want you all to pay close attention and think about how we can mobilize members to fight back. With that, I’ll turn it over to Kim and let you all stare at the better-looking half of this team for awhile.

Woman/Kim: (Stammers) Uh...yes...as Aaron mentioned, this bill could be catastrophic. Let’s start with the classic example of a neighboring state whose legislature passed a similar bill in 2011. Who can tell me what they know about Wisconsin’s Act 10?

DEBRIEF Question

What kind of intervention seemed to work—direct, delegate or distract?
If direct, what feedback was useful?

PRACTICING INTERVENTIONS IMPROV THEATER

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Scenarios: Roleplay No. 2

Instructor:

We are all are working on a political campaign. It's the beginning of the day and the campaign lead is handing out assignments to the group. Remember, we need to allow our two actors, the campaign lead and our union brother, Joan [pronounced "Zho-an"], to improv and we need to stay in our character roles while also contributing to the theatrical experience.

Campaign lead: All right folks, remember what we talked about in yesterday's debrief when you hit those doors. [*Hands out packets, giving the last one to Joan.*]

And last but not, least, to the lovely *Joannie*.

Joan: C'mon man, you know that's not my name. It's pronounced *szho-ahn*.

Campaign lead: Awww! You know I'm just kidding! What, they don't have humor where you're from?

Joan: It's not funny. You've been doing this for weeks, calling me Joannie, saying I'm a girl, it's not cool. Just cut it out.

Campaign lead: You're right. Your name is too complicated. I'll just call you Joe from now on.

DEBRIEF Question:

What kind of intervention seemed to work—direct, delegate or distract? If direct, what feedback was useful?

DEBRIEF AND DISCUSSION OF POWER

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DEBRIEF AND DISCUSSION OF POWER

20 MINUTES

1. What were your general observations on direct feedback?
2. How does positional or influential power affect your decision making?
3. Were there any times when you might engage the Code of Conduct process?



Trainer Note

On the timing, if you need to shave off 30 minutes from this curriculum, we suggest the following:

- 1. Do one Improv Theater example instead of two, for 15 minutes instead of 30.*
- 2. Reduce the debrief of Improv Theater from 20 minutes to 10.*
- 3. Reduce the Conclusion and Commitments piece from 10 minutes down to five by not taking as many comments or feedback.*

CONCLUSION AND COMMITMENTS

10 MINUTES

Thank you for participating in what we hope is just the start of a conversation about changing our organizational cultures to be more in line with our values. We discussed these values early on, we looked at the five steps of bystander intervention, we applied the 3 Ds, and we practiced a few scenarios that may have revealed both amazing actors in this group but also good critical thinkers.

These were just scenarios. It's hard to know what to do in the moment, and we'll make mistakes. But if we promote an environment of healthy peer feedback, we'll all become even better at what we do, and we will model for our federation bodies how healthy interpersonal skills really do make for a stronger organization.

Tips to remember:

1. Look for early warning signs of trouble in a group dynamic.
2. Intervene at the earliest possible point where you know there is a problem.
3. Ask for help when situations seem too much for you.
4. Intervening doesn't always mean confronting. Feedback is meant to help the person and build a culture of trust.

Signify with a thumbs up that you're committed to trying some of these techniques in a more consistent fashion.

Thanks so much.

HANDOUTS

- Is This a Problem? Worksheet
- How to Intervene: The 3 Ds

IS THIS A PROBLEM?

Instructions: Write YES or NO next to each question.

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 - **Is this a problem?**
 - **Do you intervene?**
2. You’re in a planning meeting for an upcoming event. There’s a debate about what kind of outside speaker to invite and how that will affect the overall theme and tone of the event. Lin, a young Asian American organizer, makes a suggestion and no one really seems to notice. The very next speaker takes the conversation in a completely different direction, and her point is lost. A few minutes later, Joel, the political director, makes the same suggestion that Lin had made, and many other people in the meeting step in to affirm this idea and credit him with having such an innovative solution to the problem at hand. Lin appears unfazed.
 - **Is this a problem?**
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Distract

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