

RECRUITMENT

How do we recruit leaders?

RECRUITMENT

Goals:

- * To underscore the importance of recruiting leaders at each level of a campaign
- * To provide practical guidance on how to identify leaders
- * To provide guidance on how to motivate others and how to best seek a commitment

Why we recruit leaders

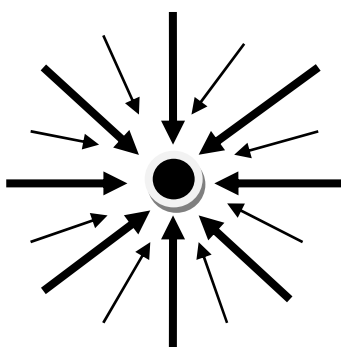
In organizing, power is built through commitment. Commitment is built through building relationships and exchanging resources between people with shared values and interests.

No organizing effort can sustain itself with a small circle of leaders. The most important job of a leader is to find other leaders.

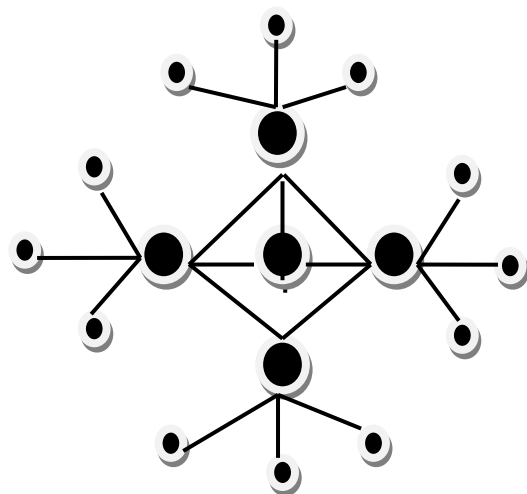
Leaders offer their hearts, heads and hands to a campaign. They tell stories that motivate others to participate; they build community through relational commitments; and they build power out of that community – all to achieve a shared vision for change.

Identifying, recruiting and developing leaders to join your organizing effort are the first steps in developing a community that can exercise leadership to harness its collective resources and create change.

Leadership is not just carried out “at the top” in an organizing campaign. It occurs at every level. For instance, the historic Montgomery Bus Boycott owes its success not just to Martin Luther King Jr. and Rosa Parks but to many leaders, including the women who conceived of and mimeographed the first call to action, as well as the hundreds of people who organized carpools so citizens in the African-American community could get to work.



“Lone Leader” model



Interdependent Leadership Model

Who should we recruit?

There is a tendency to think of leaders as the people who speak for a group, from behind a microphone, or the people who run institutions, such as health clinics and schools. But those are just the most visible forms of leadership. When recruiting leaders for organizing, look for other assets that a person brings.

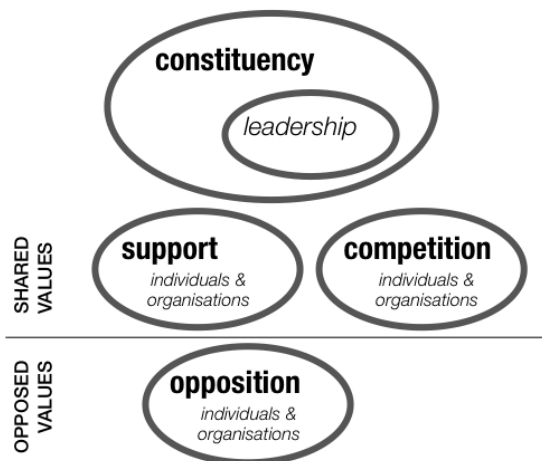
- ***The best people to recruit are those who can bring others along.*** They are rooted in one or more of the constituencies you want to organize. You may choose to recruit individuals who can bring along other *individuals* or *informal networks* because of their deep networks of relationships in a community. You may look for people who can bring *organizations* along.
- ***Look for people with good relational skills.*** They should be good listeners, not just good talkers, and able to relate to a wide variety of people. ***Good leaders believe in people.*** They encourage them, respect them, and help them develop their own leadership skills.
- ***Look for people who are clear about their values and have a positive outlook toward tackling challenges.*** Be careful about naysayers, as they can dampen the spirits of others.
- ***Seek out those with a history of collaboration.*** Leaders need to be able to put their personal agendas and organizational identities aside and work for the good of the whole. One way to know if they can do that is to find out if they've done it before. Pay attention to whether they have been part of other group efforts – perhaps at church, work or school, or in a larger, more complex collaborative.
- ***Look for people who will share leadership with others.*** Again, probe to see if they've done it before. Pastors, physicians and other traditional authority figures often lack experience in sharing leadership and may fall back on top-down models to get things done. Those who have been part of voluntary organizations, such as PTAs, may have valuable experience in sharing responsibility. Organizing depends on shared leadership and responsibility. This has to be modeled from the top.
- ***Look for passion and commitment to the cause.*** Passion and commitment are central to motivating others and providing effective leadership in the face of uncertainty.
- ***Look for those who build consensus and accept compromise.*** Watch out for overly zealous people who don't listen and can't accept constraints. The ability to compromise is critical to team success.
- ***Look for people with resources***– relationships, knowledge, moral, and financial resources. For “knowledge resources,” look for people with an understanding of the problem you are trying to solve. For “moral resources,” look to people who have widespread respect in their communities or among co-workers. For “relational resources” look for people who can bring others along with them or whose relationships can create political space for the campaign.
- ***Find people with a learning orientation, who are willing to take risks, learn from others and work outside their comfort zone.*** If the problem could be solved through conventional approaches, it would have been solved by now.

Before You Recruit: Mapping Actors, Interests & Resources

Before you begin, make sure you have a good understanding of who your constituency is and who your potential supporters and collaborators might be, all of whom share your values. It also helps to identify your opponents, or those who do not share your values.

One way to do this is through a process called “mapping.”

On a poster-size sheet of paper (3’ x 4’), start by identifying your constituents together with your team. Constituents are the people at the center of our work, the people whom we bring together, whom we ask to identify common interests, and whom we mobilize to act on those interests.



Constituent derives from Latin for “stand together.” They are people who understand their common interests, contribute resources to act on those interests, and who govern themselves. Thinking of them as constituents is different from seeing them as clients or customers.

In some campaigns or organizing projects, the constituency is quite clear and narrow – such as parents of school-age children with dyslexia. In other projects, the constituency is less obvious or there are multiple constituencies. An example might be public education. There are multiple constituencies with a desire to improve public schools – students, parents, teachers, principals

and employers, to name a few. But they all bring slightly different interests to the table. The same is true in Organizing for Health.

Your team can start mapping at any time. But it is important to come back together – after you have engaged in a round of one-to-one meetings – to see if you need to re-map the actors. Your early one-to-one meetings will also give you some clues about who may be good prospects for leadership roles.

How to Identify and Recruit Leaders

We identify leaders by building relationships. Relationship building is the key to organizing. It is the process of association that makes the whole greater than the sum of its parts.

Relationship building goes beyond delivering a message, extracting a contribution, or soliciting a vote. Relationships—which are entirely missing in canvassing, telemarketing, and most email-driven operations – are what create the “glue” that sustains volunteer engagement in the face of challenge and uncertainty. The social capital forged through relationships inspires creativity in the work and propels continued relationship building among ever-widening circles of people.

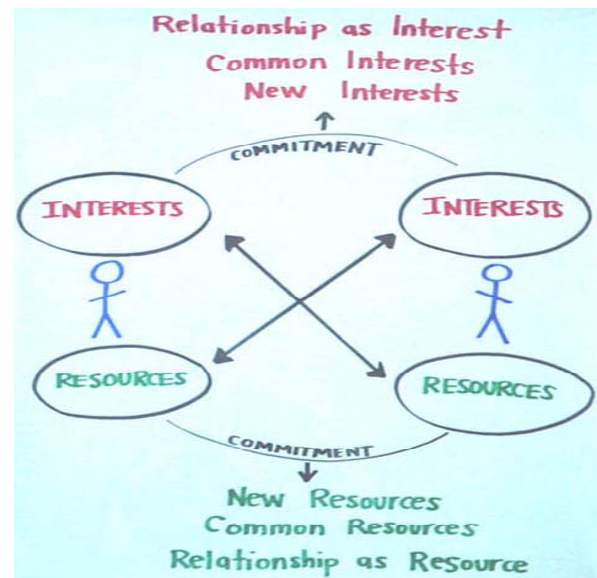
We Build Relationships through One-to-One Meetings

The absolute best way to identify and recruit people for leadership roles is through face-to-face one-on-one meetings.

There are no shortcuts for this. In fact, one-to-one meetings are “shortcuts” compared to other strategies that rely on social media, phone calls and/or public events to get people in the door.

A one-to-one meeting is a planned meeting with someone for the purpose of building a relationship, out of which involvement in the organization may grow. It is not a chance encounter in the hall or at the grocery store.

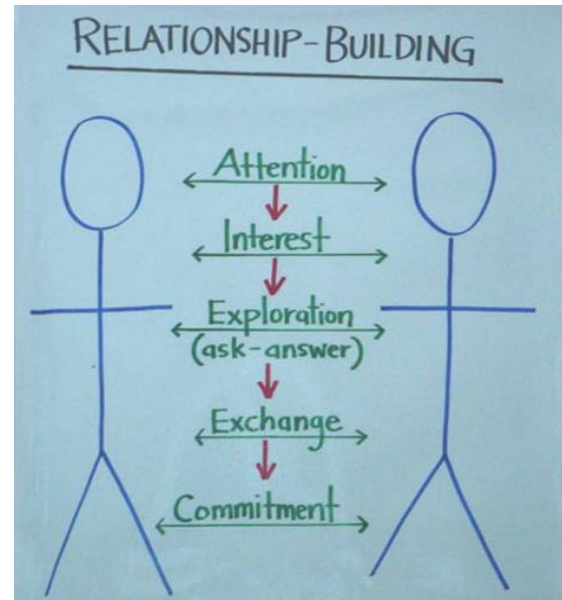
In the meeting, the organizer or leader asks questions to discover the values, interests and resources of the other person. Most meetings last 30 to 60 minutes. A meeting is successful if it ends with a commitment to a “next step,” which may be as simple as another meeting.



But not every person you meet with is a prospect for a leadership role. We do one-to-ones to get to know our constituency, to get to know potential supporters, and even (sometimes) to get to know potential opponents. The more one-to-one meetings you do, the better you will come to understand your constituency and the types of people you will want to recruit in leadership roles.

A one-to-one meeting consists of five steps

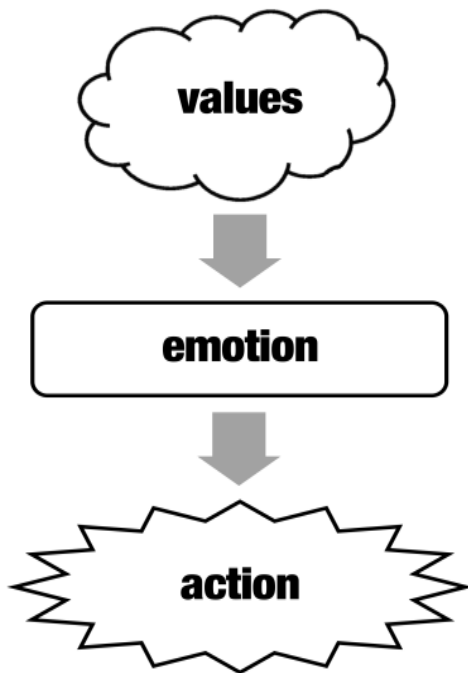
- **Get the person's attention.** If I call a minister to request a meeting, it will help get his attention if I say someone he knows referred me. If I call a potential volunteer, I will want to use his or her name and explain how I got it. I may mention a common institution, to which we are both connected.



- **Describe your interest and purpose in the conversation.** I may mention to the minister, for example, that I have heard he wants to do something about the health of his parishioners and that's what I'd like to talk about. If we happen to be taking the same class, I might suggest we see if we can help each other. Be honest and clear about the purpose of the meeting at the start.
- **Explore and probe.** This is the heart of the conversation. Ask questions to learn the other person's values, purposes and resources and be prepared to talk about yourself. Probe for areas of common interest, for skills and relationships the other might have to contribute toward common goals. Share your Story of Self – where you came from, what values drive you, and what motivates you to commit to this project. Dig for key choice points in the other person's life that reveal deep values and interests. For example, "Why did you study this rather than that?" "Why did you decide to emigrate rather than remain at home?"
- **Make an exchange.** We typically exchange resources in the meeting, such as information, support and insight. We may learn a great deal from our interaction with the other person. We may find we have an opportunity to offer another some insight, support, or recognition that he or she finds valuable. We may find we can challenge the other person in ways that bring him or her new insight.
- **Seek a commitment.** A successful one-to-one meeting ends with a commitment, most likely to meet again and/or to engage in action. If we've determined a basis exists for a relationship, we commit to the relationship by agreeing to meet again, have coffee, attend a meeting, exchange emails, etc. What turns the exchange into a relationship is the commitment we make to each other. People often make the mistake of trying to go right to a commitment without laying a relational basis for it. The goal of the one-to-one is not to get someone to make a pledge, give money or commit a vote. It is to obtain a commitment to continuing the relationship in service to a shared purpose. Sometimes it is a good start simply to commit to meeting again.

Share Your Story of Self, Us and Now & Elicit One from the Person You Are Meeting

To effectively recruit others to participate, you need to share something meaningful about yourself. If you don't explain who you are and what values and events propel you to act, others will make assumptions. It's better to share an authentic "Story of Self" at the outset, even if it means taking a few risks.



You'll also need to share your "Story of Us and Now" – a description of the challenge your group has undertaken and why your values compel you to act. And you'll need to offer a source of hope – even if it's only your faith that by combining in action, your group can make a difference.

The process of weaving together these stories is called "public narrative."

Story telling is important in leadership and recruitment because people make decisions based on emotion. It's not just our heads that guide our hands; it's our hearts.

Effective leaders are aware of this and know how to motivate others to join them through telling stories and asking for commitments to action.

Exploring and Probing: Getting the Most from Your One-to-One meetings

A one-to-one meeting is an opportunity to discover several things about the other person in a relatively short amount of time:

- You are probing for the person's **values** and his or her history of acting on those values;
- You are mining for leadership **skills** – those the person has used before and those that are waiting to be tapped;
- You are exploring the person's **resources**, which may include knowledge, relationships, and moral resources, as well as the ability to commit time, money or practical resources to the campaign.

To do this means saying enough about yourself and your project to get the person talking. Model your own story of self as a way to prompt the person to dig deeper as he or she opens up to you.

Be careful about getting sidetracked. You are there to develop a relationship for a public purpose, not to make a new friend.

Ask good open-ended questions, then sit back and wait for the answers. Try to follow the 20/80 guideline. Speak for 20% of the time and listen for 80% of the time.

Here are some questions that can help you dig deeper in one-to-one meetings. Notice that most of them are “why” questions:

- Who in your life has had the greatest influence on your values? Why?
- Why did you decide to become a _____? (doctor/ nurse/ teacher/ etc.)
- What are your concerns about _____? (topic you are working on)
- Why are you concerned about that?
- Why is it like that?
- Do you enjoy your work? Why or why not?

Here are some questions that can help you mine for leadership traits:

- Have you been talking to others about the concerns you have in your work / school / neighborhood?
- What’s your experience taking part in volunteer-run organizations? (i.e., PTAs, Boy Scouts, church activities, neighborhood watch organizations, etc.)
- Was it a good experience? Why or why not? What did you learn from that experience?
- What kinds of people do you enjoy working with? Why?
- Can you recall a tough challenge you faced when you were growing up and how you handled it?
- Who in your workplace/ neighborhood/ school / are the people that everyone turns to when they want to find out what is going on?
- Who else should I talk to about this? (Here, you are looking not only for names but for the person’s willingness to share those names with you. Sharing resources is part of collective leadership.)
- What other efforts are taking place in your community to address this problem? Do you think they will be successful? Why or why not? (Here, you are looking for the person’s capacity to think strategically, an important part of leadership.)

Moving from Exchange to Commitment

As your one-to-one conversation unfolds, you will start to get a picture of the person’s values and his or her readiness to act on those values.

You may also discover that the person has had experience sharing leadership in other settings, such as in a Neighborhood Watch group or on the governing board of a start-up school. Conversely, you may find that the person’s leadership experience, while significant, comes only from within a hierarchical setting where one person set the agenda and told others what to do.

You’ll need to take “mental notes” about all of this and think strategically about what commitment to seek. This may be different from what you were thinking when you originally set up the one-to-one.

- Do you want to invite this person to an upcoming meeting?

- Do you want a commitment from him or her to meet again with you?
- Do you want the person to share key names and phone numbers with you or to accompany you to a one-to-one meeting with someone else?
- Is the person a good prospect for your top leadership team? What about a team that might be formed later for action in a particular setting?

It's probably too early to decide. But it's not too early to think about it.

Asking for a Specific & Clear Commitment

Getting clear commitments from others is essential. People don't participate without being asked.

It's not enough to ask, "Do you want to be part of this?" You have to define the next step and ask for a specific commitment.

Often, we are afraid to ask people directly when we want them to volunteer. We may worry that we will burden others, or that the person will say "no" and we'll feel rejected.

Remember, though, that when you became involved, it was probably because someone asked you. Also, by asking someone to get involved, you are giving that person an opportunity to act on his or her values. You are offering an opportunity to develop new skills and relationships. And you are offering an opportunity to work with others toward a shared vision of a brighter future.

So how do we ask? When asking for commitments, it is essential that we use clear, concise language. Asking for commitments involves two straightforward steps:

1. Explaining why the action you are asking another to take is important (drawing on your story of now).
2. Explicitly asking other person if you can count on him or her to engage in the relevant activity or follow-up step.

You might say, "May I meet with you again in two weeks when I have a better idea of what kinds of people we'll need on our committees?"

Or you might say, "May I introduce you to _____, our team leader, and we can talk at that time about whether a role on the leadership team might be a good fit for you?"

In each of these examples, you would then want to take out your calendars and schedule a date. Only when people make a specific commitment to follow up is a relationship established.

Securing your commitment with the 4 C's

You have made a **connection** through stories. You have created the **context** for your request. You have crafted a specific, clear **commitment**. Now, it's time to **catapult** the person into action.

That means confirming the specifics of the commitment, including the date and time, and ending with a clear question, such as, “Can I count on you for this?” Then, if appropriate, say when and how you will be back in touch to follow up.

By doing this, you will underscore that you have established a relationship on which further commitments grow.

Conclusion

Identifying leaders, conducting one-to-one meetings and crafting requests for specific commitments are skills that come with practice.

As you practice, you will discover how important these skills are and you will undoubtedly make mistakes.

A common mistake is to encourage the first person who steps forward to take on a significant leadership role. This person may have energy and passion, but may lack essential skills, such as the ability to work well in a team. Hold off until you’ve had more time to see if the person has what it takes.

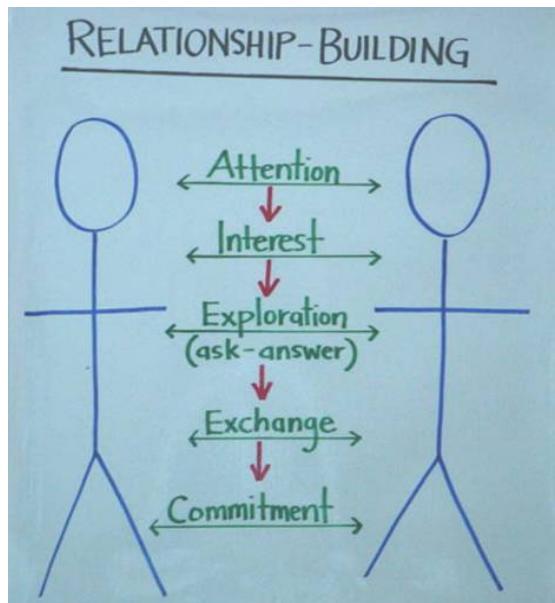
It may help if your group sets specific goals and a timeline for recruiting new people. That way, you can approach your recruiting as a mini-campaign within a campaign. Everyone can report back to the group on who they’ve met with and what they’ve learned. Then, the group can decide together on who should be asked to fill specific roles.

The most important thing about recruiting is to have fun! If you show your enthusiasm, articulate your values, offer a little bit of yourself, and demonstrate your own commitment, others will want to work with you.

Good luck!

ONE-TO-ONE PRACTICE EXERCISE (30 min)

Choose a partner you don't know. One of you will initiate a 10-12 minute one-to-one meeting with the other. Then switch partners. Make sure that if you haven't initiated the one-to-one meeting yet, that it is now your turn to do so. During the one-to-one, be sure to move through *four* of the five core steps:



- (1) Describe your **interest** and purpose in the conversation;
- (2) **Explore** values and interests;
- (3) **Exchange** resources, insights and ideas; and
- (4) Seek a **commitment**.

After 25 minutes, we will ask you to spend 2 minutes sharing what you have learned about your partners, including what commitments you made to each other. We will also ask you to reflect upon the exercise itself.

Step #1 – Get the person's attention. This will already have occurred when you start this exercise.

Step #2 – Describe your interest and purpose in the conversation. Be honest and clear about your reason for the meeting. For example, "I am working on a project to improve the health of our community by involving patients, providers and insurers in new ways

of working together. I'd like to find out about your interests, tell you a little bit about our efforts, and see if you'd be interested in playing a role." Also, check in on whether the person has 10-12 minutes of time for the meeting, so you are clear from the start on when you need to end.

Step #3 – Explore and Probe. Learn about the other person's **values, interests** and **resources** and be prepared to talk about yourself. Probe with "why?" questions to get to choice points and specific experiences that shaped his or her life. Share your story. Listen to your partner's story for the motivations and the resources he/she might bring to the campaign (particular leadership skills, a particular network, specific action skills, etc.). *Be specific.*

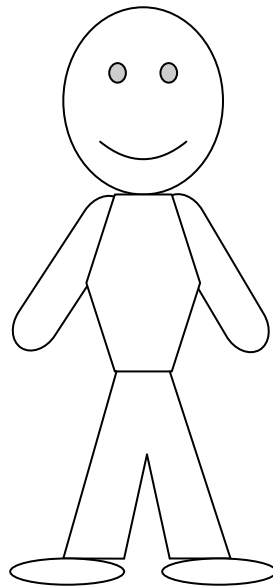
Avoid talking about issues in an abstract way — get to the lived experience of why you care about the specifics that you want to do something about.

During the exploration stage of the 1:1, ask: "What values were you taught that make you care about this? How did you learn these values? From whom?"

Step #3 – Explore & Probe (continued):

STORY: What's your family story? What in your life brought you here today?

CHALLENGES: What keeps you from action? What do you fear? What would you want to learn?



HOPE: What motivates you to act to organize others? What's your vision of how things could be different if we work together?

LEADERSHIP RESOURCES: What skills do you have? How do you lead others already in your life? What would you be willing to bring to this movement?

Step #4 – Seek a Commitment. Make a specific “ask” of your partner. Put a date and time on it as a way to secure the commitment. If the person does not want to get involved directly, will he or she introduce you to others? Look for ways where you might find points of synergy and seek a commitment to those particular follow-up steps.

BY THE END OF YOUR 1:1, MAKE SURE YOU CAN ANSWER THESE 4 QUESTIONS:

What **values** do we share?

What **interests** can we act on together?

What **skills and resources** do we each bring to this work?

When will we **meet again** and/or **what will we do next** to take action and to keep building this relationship?

REFLECTION:

How does this way of doing one-to-ones compare with other types of conversations you have? How is it different from an interview? How is it different from a sales pitch?

What was most challenging about that exercise?

How could this type of relationship-building (either through one-to-ones or at house meetings or meetings) be used in organizing in your community?