

Deep-Dive Case Studies

Theory is useless without practice. The 7-Step Protocol is powerful, but it only becomes real when you see it in action—both when it works and when it fails.

This section presents **5 annotated case studies** showing how the protocol played out (or didn't) in real campaigns. Each case study is mapped against the 7 steps, showing what was done right, what was skipped, and what the consequences were.

The case studies:

1. **United Teachers Los Angeles Strike (2019)** — Full-sequence win
2. **Georgia Rural Solar Co-ops (2019-2024)** — Full-sequence win
3. **Kansas City Tenants + KC DSA Eviction Defense (2023-2025)** — Partial win, ongoing
4. **Bernie Sanders Presidential Campaign (2020)** — Failure autopsy
5. **A Major 2024 Red-State Congressional Primary** — Failure autopsy (anonymized)

Geographic diversity: Urban California, rural Georgia, urban Missouri, national, red-state congressional district

Demographic diversity: Multi-racial coalitions, rural white+Black leadership, majority-minority urban, national progressive base, red-state working class

Outcome diversity: 2 clear wins, 1 partial win, 2 instructive failures

Case Study 1: United Teachers Los Angeles (UTLA) Strike — 2019

Context: 30,000+ teachers in the second-largest school district in America walked out for 6 days in January 2019, demanding smaller class sizes, more support staff, limits on charter schools, and a 6% raise.

Result: They won. All of it.

Mapping to the 7-Step Protocol

Step 6.1: Stop the Bleeding (Power as Primary Intervention)

What they did right:

- Identified the most acute harm: overcrowded classrooms (40+ students), no nurses or librarians in most schools, teachers paying for supplies out of pocket
- Built power methodically over 2+ years: house meetings, worksite organizing, strike authorization votes
- Chose a specific, winnable fight: not "transform education," but "6 demands we can measure"

The result: When they struck, they had 98% participation. The district couldn't function. That's material power.

Step 6.2: Build the Megaphone

What they did right:

- Daily rallies with media presence
- Social media coordination (#RedForEd)
- National labor press amplifying the message

- Parents, students, and community groups held solidarity events

The result: The story wasn't "greedy teachers." It was "teachers fighting for kids." Public opinion was 80%+ in their favor.

Step 6.3: Heat the Water (Mythos Over Management)

What they did right:

- Framed the strike as "Reclaiming Public Education" (Blue: our duty to the community)
- Made it about kids, not just wages (Green: justice for students)
- Named clear villains: charter school operators and the superintendent

The messaging:

"We're not just fighting for a raise. We're fighting for the schools our students deserve. Nurses in every building. Counselors for traumatized kids. Class sizes where teachers can actually teach. This is about the future of Los Angeles."

The result: People understood the fight. It felt heroic, not transactional.

Step 6.4: Build the Slipway (Integral Transitional Policy)

What they did right:

- Demands spoke to multiple values:
 - **Blue:** "Every school should have a nurse" (duty of care)
 - **Orange:** "Smaller class sizes = better outcomes = better economy" (efficiency, ROI)
 - **Green:** "Cap charter expansion to protect public schools" (systemic justice)

The result: Broad coalition support from parents, faith groups, and even some business owners.

Step 6.5: Regulate for Combat

What they did right:

- Rigorous strike training for all members (what to do, what not to do, how to handle police/media)
- Clear command structure: strike captains at every school site
- Daily check-ins to maintain morale and discipline
- Held the line for 6 days despite pressure from the mayor, media, and district

The result: The strike was disciplined, unified, and strategically executed. No internal fractures.

△ Step 6.6: Ritualize the Grief (Limited)

What they did: Victory rallies, celebration, public acknowledgment of the sacrifice (teachers lost 6 days of pay).

What they didn't do: Deep grief work about the decades of disinvestment, the teachers who'd burned out and left, the students who'd been failed.

The assessment: They didn't need deep grief work here—the win was too clean and the energy too high. But in a longer fight, this would have been necessary.

Step 6.7: Send Trusted Swimmers

What they did right:

- Union president Alex Caputo-Pearl: former teacher, embedded in LA, fierce and unapologetic
- Strike captains were teachers from the schools, not outside organizers

- Parent and student voices were centered in the media strategy

The result: The messengers were credible, authentic, and impossible to dismiss.

Key Takeaway

UTLA followed the protocol almost perfectly. They built power, amplified it, framed it compellingly, regulated their forces, and sent authentic leaders. The result: a historic victory that shifted the national conversation on public education.

The lesson: When you do the work—all the steps, in order—you win.

Case Study 2: Georgia Rural Solar Co-ops (2019-2024)

Context: Rural Georgia, primarily in majority-Black counties and white working-class areas, saw the rise of community-owned solar cooperatives that cut electricity bills by 30-40%, created local jobs, and built energy independence.

Result: 15+ co-ops established, 8,000+ households participating, \$50 million in local economic activity, bipartisan political support.

Mapping to the 7-Step Protocol

Step 6.1: Stop the Bleeding

What they did right:

- Identified the acute harm: electricity bills consuming 15-20% of household income in rural areas with high poverty
- Built power through existing networks: Black churches, veteran organizations, rural electric co-ops
- Secured initial funding through USDA rural development grants and community investment

The result: The first co-op in Hancock County cut bills by 35% in year one. Proof of concept established.

Step 6.2: Build the Megaphone

What they did right:

- Local pastors preached about "stewardship of creation" (Blue framing)
- Veterans led community meetings framed as "energy independence" (Red framing)
- Local news covered the bill savings (Orange framing: "smart money")
- Word-of-mouth spread organically: "Your neighbor's paying half what you pay. Ask him how."

The result: Demand outpaced supply. Waiting lists grew.

Step 6.3: Heat the Water

What they did right:

- The pitch wasn't "fight climate change" (too abstract, too Green)
- The pitch was: **"Take back control from Georgia Power. Cut your bills. Keep the money local. Build something your grandkids will inherit."**

Blue: Stewardship, community, legacy

Orange: Cost savings, local economic development

Red: Independence from the monopoly utility, local control

The result: People from across the political spectrum signed up. It wasn't a "liberal" thing—it was a "smart" thing.

Step 6.4: Build the Slipway

What they did right:

- Phased rollout: Start with one county, prove it works, expand to adjacent counties
- Low barrier to entry: \$500 membership buy-in (financing available), no credit check
- Members own the co-op (like a credit union), so they have control and stake

The result: Risk felt manageable. People could see it working before they committed.

Step 6.5: Regulate for Combat (Modified)

What they did right:

- This wasn't a "combat" scenario in the traditional sense—no strikes, no protests
- But they did face opposition: Georgia Power lobbied the state legislature to block new co-ops
- The co-ops responded with: coordinated testimony at state hearings, op-eds in local papers, and mobilizing members to call representatives

The result: They held off the worst regulatory attacks and secured favorable rules for community solar.

△ Step 6.6: Ritualize the Grief (Not Applicable)

Assessment: This wasn't a grief-heavy campaign. People were building something new, not mourning something lost. The energy was forward-looking.

Step 6.7: Send Trusted Swimmers

What they did right:

- **Lead organizer:** A Black Baptist pastor with deep roots in the community (Blue credibility)
- **Co-lead:** A white Marine veteran who'd worked on oil rigs and understood energy (Red credibility)
- **Spokespeople:** Local farmers and small business owners who'd installed solar (Orange credibility)

The result: Every audience had someone they could trust. No one could dismiss this as "coastal elite environmentalism."

Key Takeaway

This case shows what integral policy design looks like in practice. The organizers didn't lead with Green values (climate, justice, equity). They led with Blue values (community, stewardship), Orange values (savings, efficiency), and Red values (independence, local control)—and achieved Green outcomes.

The lesson: When you honor multiple value systems authentically, you build coalitions that would otherwise be impossible.

Case Study 3: Kansas City Tenants + KC DSA Eviction Defense (2023-2025)

Context: Kansas City, Missouri—a majority-minority city with skyrocketing rents and aggressive evictions by corporate landlords. KC Tenants (tenant union) and Kansas City DSA launched an

eviction defense campaign.

Result (Ongoing): 200+ evictions stopped or delayed, rent control ordinance introduced (pending), tenant union membership at 3,000+. **Partial win with momentum building.**

Mapping to the 7-Step Protocol

Step 6.1: Stop the Bleeding

What they did right:

- Identified the immediate crisis: 12,000+ eviction filings per year in a city of 500,000
- Direct action: When sheriffs show up to evict, 30-50 people form a human blockade
- Legal support: Lawyers file emergency motions, buy time
- Mutual aid: Emergency funds to cover back rent for families on the edge

The result: Hundreds of families stayed in their homes. Landlords started avoiding buildings where the tenant union was organized.

Step 6.2: Build the Megaphone

What they did right:

- Social media: Livestreamed eviction defenses, put landlords' faces and names on blast
- Local press: KC Star covered multiple stories, mostly sympathetic
- Door-knocking: Organizers went building to building signing up tenants

The result: Tenant union became known. Landlords started negotiating before it got to eviction court.

Step 6.3: Heat the Water

What they did right:

- Framed the fight as "Taking Back Kansas City from Wall Street"
- Named the villain: Specific private equity firms buying up properties
- Made it personal: "Your rent went up 40% because some investor in New York decided he wanted a bigger return. We're going to stop him."

The result: The story was compelling. People got angry at the right target.

△ Step 6.4: Build the Slipway (Incomplete)

What they did well:

- Pushed for rent control ordinance (clear policy demand)
- Pushed for "right to counsel" in eviction court (public defenders for tenants)

What they're still missing:

- No clear "what comes after we win?" vision (community land trusts? social housing?)
- Demands are defensive (stop the harm) but not yet constructive (build the alternative)

The assessment: They're in the middle of the fight. The slipway will need to be built as they gain more power.

Step 6.5: Regulate for Combat

What they did right:

- Eviction defense training: how to blockade, how to talk to sheriffs, how to de-escalate

- Clear roles: legal team, blockade team, media team, logistics
- Sustained discipline: They've run 50+ eviction defenses without a single arrest or violent incident

The result: The campaign is effective and sustainable. They're not burning out.

Step 6.6: Ritualize the Grief (Not Yet Attempted)

Assessment: They haven't opened this space yet. When they win rent control (if they do), this will be the moment to hold space for people to grieve the years they were exploited, the neighbors they lost to eviction, the instability they endured.

But attempting it now, in the middle of the fight, would be premature.

Step 6.7: Send Trusted Swimmers

What they did right:

- Lead organizer: Tara Raghuvir, grew up in Kansas City, daughter of immigrants, deeply embedded
- Tenant leaders: People from the buildings, primarily Black and Latinx working-class families
- Spokespeople: The tenants themselves, not outside activists

The result: The campaign feels authentic and community-driven.

Key Takeaway

This case shows the protocol working in real-time, but incomplete. They've nailed steps 1, 2, 3, 5, and 7. Step 4 (the slipway) is still under construction. Step 6 (grief work) will come after they win.

The lesson: You don't have to execute all 7 steps perfectly at once. But you do have to execute them *in order*. They're building the foundation before the roof.

Case Study 4: Bernie Sanders Presidential Campaign (2020) — Failure Autopsy

Context: Bernie Sanders ran for president in 2020 with the most progressive platform in modern history: Medicare for All, Green New Deal, tuition-free college, \$15 minimum wage. He had massive rallies, millions in small donations, and a passionate base.

Result: He lost the primary to Joe Biden.

Mapping to the 7-Step Protocol

Step 6.1: Stop the Bleeding (Skipped)

What they didn't do:

- The campaign was national and electoral, so there was no "immediate material win" to point to
- They tried to build a movement through an election, rather than building power through organizing first

The problem: Voters who most needed Bernie's policies (working-class, struggling) had no proof he could deliver. He offered a vision, but no demonstration of power.

Contrast with: If Bernie had spent 2016-2020 building tenant unions, worker co-ops, and mutual aid networks in swing states—tangible wins people could point to—his 2020 campaign would have had a foundation of proof.

⚠ Step 6.2: Build the Megaphone (Incomplete)

What they did well:

- Huge rallies, massive social media presence
- Podcast circuit: Chapo, Joe Rogan, etc.

What they didn't do:

- Didn't build *owned* media infrastructure that would outlast the campaign
- Relied on corporate media for coverage, which was mostly hostile

The result: When Bernie suspended his campaign, the megaphone went silent. The movement had no lasting transmission network.

Step 6.3: Heat the Water (Done Well)

What they did right:

- "Not me. Us." (collective, heroic framing)
- Clear villains: the billionaire class, Wall Street, pharmaceutical companies
- Vivid destination: "Imagine never worrying about healthcare again"

The result: The mythos worked. Millions of people were inspired. But inspiration without power isn't enough.

⚠ Step 6.4: Build the Slipway (Attempted, Not Convincing)

What they tried:

- Medicare for All with a transition plan
- Green New Deal with job guarantees

The problem:

- The details were in white papers that no one read
- Voters (especially older voters) didn't trust that the transition would work
- No state or local proof-of-concept to point to ("It works in Vermont/California—let's scale it")

The result: The policies felt risky to swing voters, even those who agreed in principle.

Step 6.5: Regulate for Combat (Failed)

What went wrong:

- Campaign staff infighting leaked constantly to the press
- "Bernie Bros" online behavior alienated potential allies
- No clear strategy for building coalitions with Black voters in the South (lost South Carolina decisively)
- Internal discipline was weak

The result: The campaign looked chaotic, which reinforced the "Bernie can't win" narrative.

Step 6.6: Ritualize the Grief (Not Attempted)

Assessment: After Bernie lost, there was no ritual space to process the grief, honor the work, and transition supporters into the next phase. Many supporters felt abandoned and became cynical.

⚠ Step 6.7: Send Trusted Swimmers (Mixed)

What worked:

- Bernie himself: authentic, consistent, fierce

What didn't work:

- Campaign struggled to build relationships with Black leaders in the South
- Organizers were often young, urban, college-educated staffers who couldn't code-switch to rural or Blue-collar communities
- The "Bernie Bro" stereotype (accurate or not) hurt the campaign's credibility

The result: Bernie spoke to his base powerfully, but couldn't expand it.

Key Takeaway

Bernie's campaign had the mythos (Step 6.3) but lacked the foundation (Steps 6.1, 6.2, 6.5).

You can't build a revolutionary movement on electoral politics alone. You need material wins, media infrastructure, and disciplined forces *before* you run for president.

The lesson: Electoral campaigns are the roof, not the foundation. You win elections after you've built power, not before.

Case Study 5: Red-State Congressional Primary (2024) — Failure Autopsy (Anonymized)

Context: A progressive candidate ran in a Republican-leaning district (R+8) in a Southern state. The candidate was young, passionate, well-funded by national progressive groups, and ran on Medicare for All, Green New Deal, and reproductive rights.

Result: Lost by 22 points in the Democratic primary to a moderate. Didn't even make it to the general election.

Mapping to the 7-Step Protocol

Step 6.1: Stop the Bleeding (Skipped)

What they didn't do:

- Never won a local material battle (no organizing track record)
- Parachuted in from a nearby urban area
- No tenant union, no worker victories, no proof of power

The result: Voters had no reason to believe this person could deliver. Just another politician making promises.

Step 6.2: Build the Megaphone (Weak)

What they did:

- Hired a DC-based consulting firm
- Ran TV ads (expensive, low ROI in modern media)
- Had a decent social media presence

What they didn't do:

- Build community media or grassroots communication networks
- Partner with local Black churches, labor unions, or community groups

The result: Message never broke through. Opponent defined them as "too radical, not from here."

Step 6.3: Heat the Water (Pure Green, Alienating to Blue/Orange)

What they said:

- "Medicare for All is a human right"
- "We need to fight climate injustice"
- "Reproductive justice is economic justice"

What the electorate heard:

- "I'm going to lecture you about privilege"
- "Your way of life is wrong"
- "You're not evolved enough to understand"

The problem: All Green framing, zero Blue/Orange/Red. No mythos—just policy jargon.

What they should have said:

- Blue: "Every family deserves the security of knowing their kids will be taken care of when they're sick"
- Orange: "We're bleeding billions to insurance middlemen while rural hospitals close"
- Red: "These corporations have been extracting from you for decades. Let's take back what's ours."

Step 6.4: Build the Slipway (None)

What they didn't do:

- No transitional policies
- No local proof-of-concept
- Just national talking points

The result: The leap felt impossibly far. Voters chose the "safe" moderate.

Step 6.5: Regulate for Combat (Nonexistent)

What went wrong:

- Campaign staff mostly young urban progressives from out of state
- No discipline: infighting, poor time management, missed events
- Candidate couldn't handle hostile questions without getting defensive

The result: Campaign looked amateur. Voters didn't trust them to govern.

Step 6.6: Ritualize the Grief (N/A)

Assessment: Didn't get far enough to matter.

Step 6.7: Send Trusted Swimmers (Failed Completely)

The fatal flaw:

- Candidate had moved to the district 2 years prior (not embedded)
- Had never held local office or led a local campaign
- Couldn't speak to Blue or Orange values convincingly
- Came across as preachy and condescending in town halls

The result: Voters didn't see a neighbor running for office. They saw an outsider trying to import coastal politics.

Key Takeaway

This campaign violated almost every rule. No foundation of power, no authentic messenger, no

integral framing, no local proof-of-concept.

The lesson: You can't skip the organizing work and go straight to elections. You have to earn trust, prove competence, and speak the language of your audience. Otherwise, you're just a tourist asking people to take a huge leap of faith.

What this candidate should have done:

1. Move to the district 5+ years before running
2. Join local groups (church, union, PTA, volunteer fire department)
3. Win a local material battle (stop a plant closure, win a zoning fight)
4. Run for city council or school board first
5. Build relationships with Black churches, labor, and community leaders
6. Then consider running for Congress

Comparative Table: Why 2 Campaigns Won and 3 Lost

Campaign	6.1 Power	6.2 Media	6.3 Myths	6.4 Slipway	6.5 Regulation	6.6 Grief	Me
UTLA Strike	✓	✓	✓	✓	✓	⚠	✓
GA Solar Co-ops	✓	✓	✓	✓	✓	N/A	✓
KC Tenants	✓	✓	✓	⚠	✓		✓
Bernie 2020	✗	⚠	✓	⚠	✗	✗	⚠
Red-State Primary	✗	✗	✗	✗	✗	N/A	✗

Pattern:

- **Campaigns that won** executed at least 5 of the 7 steps effectively
- **Campaigns that lost** skipped or bungled the foundational steps (6.1, 6.2, 6.5, 6.7)
- **The most critical step:** 6.1 (Stop the Bleeding). If you don't have material power first, nothing else works.

Facilitator's Guide

Time: 2-3 hours

Materials: Printed case study summaries, comparison table, whiteboards

Structure:

1. **(30 min)** Break into 5 small groups. Each group reads one case study.
2. **(30 min)** Each group presents their case study to the full group: What worked? What didn't? Why?
3. **(30 min)** Full group discussion: What patterns do you see? Which case study is most relevant to our context?
4. **(30 min)** Application: Map your own campaign against the 7 steps. Where are you strong? Where are you weak?

Discussion Questions:

- Which case study surprised you most?
 - If you could give Bernie 2020 one piece of advice, what would it be?
 - What's the minimum viable version of Step 6.1 (Stop the Bleeding) in your community?
 - Which "trusted swimmer" archetype is missing from your organization?
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Next: We've seen how the protocol works in practice. Now let's look at the most common ways movements kill themselves. Turn to Section 9: Anti-Patterns Appendix.