

**LEADER
SALTA**
FACILITATOR'S
GUIDE

MESSAGING FOR SOCIAL CHANGE



SESSION OVERVIEW

SESSION DESCRIPTION: Persuading individuals and organizations to support EHC's goals and objectives and to take action requires effective messaging. In this session, EHC Leaders will learn the basics of message development and how their personal stories can be used to inspire trust and hope in the target audience and create the will in them to take action. The framework for this session flows from EHC's Power Analysis. Certain activities and concepts are adapted from The Spitfire Strategies' Smart Chart 3.0 and the work of Marshall Ganz' Camp Obama trainings.

CORE CONCEPTS:

1. **You can spot us in a crowd:** EHC's logo, tagline and positioning statement provide a consistent and unified image.
2. **We share values:** Sharing stories is a way to identify our common values and influence people.
3. **Problem/Solution/Action:** The Problem/Solution/Action framework is used to create strategic messages.

Agenda

Section	Time
1. Review & Introduction to Session	15 minutes
2. Communicating EHC to Everyone Else	20 minutes
3. The Messaging Process – Overview	15 minutes
4. The Contents: Problem, Solution, Action	30 minutes
5. The Power of Storytelling: Influencing People to Take Action	10 minutes
6. My Story	40 minutes
7. Dos and Don'ts of Public Speaking	10 minutes
8. Evaluation	10 minutes
TOTAL TIME	150 Minutes (2-1/2 Hours)

EHC VICTORY(IES)

FEATURED:

MMC Energy Plant
Expansion Permit

ICON LEGEND



Show Slide

Marks which powerpoint slide corresponds to the curriculum



Post/Document

Denotes when something should be posted or a discussion should be documented and posted



Alloted Time

Shows how much time is allotted for each section in minutes



Tools

Lists the materials needed for a particular section



Activity

Shows when something is used for an activity

Messaging Session Toolbox

Click here for easy-to-reproduce handouts, activity materials, power points, and other documents for the session.

Messaging PowerPoint



Build-a-Leader Components



Introduction for Positioning Statement Activity



Storytelling Guidelines



NOTEBOOK MATERIALS

EHC Expanded Leader Definition

PSA Messaging Worksheet

Public Speaking Guide

Comic Book Evaluation

Session Evaluation

RELATIONSHIP TO PRIOR SESSION(S):

Environmental Health/Environmental Justice: Industrial air pollution disproportionately impacts communities of color

Power: Effective messaging is necessary to shift the power analysis

SESSION CHECKLIST

Staffing needs:

- ☐ Facilitator
- ☐ 4 EHC staff members (same as from Power Session or others who know the issue)
- ☐ Scribe

Pre-Session Preparation:

- ☐ Make large printouts of Goals, PFA, Power Analysis and Introductory statement. Post on the walls. Participants will refer to these as they develop their messages.
- ☐ Facilitator (or other assigned person) develops their "story" as the example in Section V.
- ☐ Bring large Power Analysis maps developed in Power Session (or smaller printouts for each group)
- ☐ Have on hand envelopes and blank letter paper for each participant

Equipment/other needs:

- ☐ LCD projector
- ☐ Laptop computer queued to start of PowerPoint presentation
- ☐ Easel paper, flip chart markers
- ☐ White board markers

2 Review & Introduction to Session

Total Time: 15 minutes

Participant Objectives:

1. Review last session and understand connection to current session
2. Expand knowledge of what an EHC leader is
3. Understand the role of EHC leaders in crafting and delivering effective messages



Tools:

- PowerPoint Slides 1-2
- Build-a-Leader Components



HOUSEKEEPING

- a. When participants arrive have them collect their nametag.
- b. **Vote on best comic:** when participants arrive have them lay out their finished comic with their name written on the back. During dinner each participant will vote on the one they feel best represents the previous session.
- c. Post daily core concepts

WELCOME

- a. **Welcome** participants back to Leader SALTA.
- b. **Clarify/answer concerns or questions.** Ask participants if they have any questions/comments concerning the prior sessions. Ask other participants to help answer/clarify the questions.
- c. **Make connection** between prior sessions and the current session:
 1. **Power Session.** In the Power Session, we created a Power Analysis, identifying a goal, an objective, the decision maker(s), and some of the potential players. These are also the first steps in creating a message. The focus of this session is to train participants to create and deliver effective messages that can build support for EHC campaigns, shift the power analysis, and influence community members and decision makers to take the desired action.
- d. **Leader Definition.** EHC Leaders are its most valuable messengers, especially when reaching out to community residents. Refer participants to the expanded version of the EHC Leader definition in their notebooks. Point out that messaging is especially important under "Represents EHC and provides EHC information to the community." Add Build-a-Leader components to the poster.

SIDE NOTE TO FACILITATOR:

This session has many different types of activities and many could take more time than allotted. EHC's recommendation is to choose several but not all of these activities to fit in a small amount of time. Choose activities that most closely align with what you hope to accomplish with your group.



Represent EHC and provide EHC information to the community.

- Inform their neighborhood network of residents
 - Make presentations to groups
 - Is an EHC spokesperson to the media
 - Testify at public hearings and meetings
 - Lobby government officials to take specific action
 - Represent EHC and community perspectives in educational tours, at funder site visits and other meetings
- e. **EHC's new logo, tag line, and messaging will be introduced.** Graphics and messaging are ways of establishing a consistent EHC identity in the minds of the public. No matter which particular issue is being discussed, EHC's core values must come through.

Icebreaker

- a. Have each participant think of a catch phrase or song from a commercial that they know by heart.
- b. Break the group into two teams. Someone from one team starts and they try to get the other team to guess where their phrase is from. When that team guesses, they get to have a turn for the other team to guess.
- c. This leads into talking about how companies want their songs and phrases to be remembered, and how we want EHC to be remembered by the public.

2 Communicating EHC to Everyone Else

Total Time: 20 minutes

Objectives:

1. Understand EHC's Logo and Tagline
2. Learn an introductory statement that Leaders use when delivering an EHC message



Tools:

- » Print out of 3 positioning statements
- » PowerPoint Slides 3-7

EHC'S LOGO: WHY IS AN EHC LOGO IMPORTANT?

Ask participants why they think a logo may be important. **Potential answers:** it's an easy way to identify the organization, and once people learn more about an organization, the visual image can convey all of the meaning of the words in the mission statement and goals; it's a shortcut to understanding what an organization is about; people displaying the logo (such as on a t-shirt) can identify each other as belonging.



- » **Dissecting the parts of the EHC logo.** Ask participants to say what comes to mind when they see the logo



EHC'S TAGLINE

A tagline is a simple sentence or a few phrases that say what is most important to an organization. The logo and tagline usually go together as a visual/written representation. If the logo is used in a small format, the tagline is replaced with a solid bar. The tagline could be used at the end of a presentation "... and that's what EHC is about – empowering people, organizing communities, and achieving justice!"



EHC'S POSITIONING STATEMENT/EHC INTRODUCTION

- Definition of Positioning Statement.** A positioning statement is a short paragraph that reflects the core values of an organization and differentiates that organization from others. The EHC positioning statement works for written or formal verbal communication (e.g., if you're testifying before the City Council), but it is still too long and formal for one-on-one communication.



- Why a Positioning Statement?** The logo and tagline tell people a lot about EHC, but it still doesn't really say what EHC does.
 - » Environmental Health Coalition (EHC) builds grassroots campaigns to confront the unjust consequences of toxic pollution, discriminatory land use, and unsustainable energy policies. Through leader development, organizing and advocacy, EHC improves the health of children, families, neighborhoods and the natural environment in the San Diego/Tijuana region.

Developing Your Introduction

- a. **Using the Positioning Statement to Develop an informal EHC Introduction.** Click through slide as each sentence is read. Have six volunteers come to the front of the room and pair them off. One member of each pair will get a copy of one of the introductory sentences. After the first sentence is read, the partner will critique it – what works and what doesn't. After the partner's critique, open the discussion to the whole group.

Possible responses:

Hello, my name is ____ and I'm a leader with the Environmental Health Coalition.

- Environmental Health Coalition builds grassroots campaigns to confront the unjust consequences of toxic pollution, discriminatory land use, and unsustainable energy policies.

Unfamiliar terms. In the first statement, there are too many unknowns – what is a grassroots campaign? The phrase “confront the unjust consequences” may take most people outside of their comfort zone. “Toxic pollution, discriminatory land use, and unsustainable energy policies” may be unfamiliar phrases and sound bureaucratic.

- Environmental Health Coalition's strategies are to develop leaders and to organize and advocate for environmental justice.

Too EHC-centered. In the second statement, people won't care about our strategies and “environmental justice” may be an unknown phrase.

- **Environmental Health Coalition works to improve the health of children, families, neighborhoods and the natural environment in the San Diego/Tijuana region.**

Just right! Focus on community. The third phrase makes a connection between EHC and what they care about – the health of their children, their family, their neighborhood, and their environment. It also puts EHC's work in a positive light – we work to improve.

- b. **Obtain consensus on 3.** After all three sentences have been read, ask participants which of the introductory sentences, all of which use some part of the positioning statement, they think their neighbors would respond best to. Presumably Option 3 wins. Just as the logo and tagline present a consistent image, the introduction must be consistent.

- c. **Give an example of an introduction using the positioning statement.**

“Hi, my name is ____ I'm a leader with the Environmental Health Coalition. We work to improve the health of children, families, neighborhoods and the natural environment here in the San Diego and Tijuana region. I got involved because my daughter has asthma and I think it's a direct result of the pollution in my community.”

SUMMARY

Being consistent – using the EHC logo in the same colors, and when the logo is large enough, with the tagline, and describing EHC in the same words – helps to establish the EHC's identity in the community.

3 The Messaging Process: Overview

Total Time: 15 minutes

Participant Objectives:

1. Understand the relationship between the Analyze Phase of the Process for Action (Power Analysis Map) and developing a message to influence people.
2. To use the Envelope/Contents/Messenger concept as a tool for messaging.



Tools:

- Envelopes and paper
- PowerPoint Slides 8-14



HOW DO YOU MAKE AN APPROPRIATE MESSAGE? (5 MINUTES)

- a. Ask for a volunteer to explain how to make a sandwich or tacos or something that everyone knows, as if they were talking to a 4 year old.
- b. Next, ask for a volunteer (same or different) to explain how to make a sandwich to a chef in a restaurant.
- c. Notice the difference in how they explain a task – what was different in each explanation? Vocabulary, break down of steps etc.
- d. We do this all the time, depending on who we are talking to we change how we speak, what we say and how we say it. This is what we need to remember when we are working as EHC Leaders as well.



MESSAGING



- a. **Review Power Analysis.** The purpose of the Power Analysis Map was to determine **who** needed to be convinced to support our objective.
- b. **In last week's sample Power Analysis,** a clear goal, an objective, the Ultimate Decision Maker and Individual Decision Makers were identified. These must always be kept in mind when developing a message for any of the players identified on the map.



- c. **Brainstorm most important facts** – list these things, being as specific as possible: How many pollutants will be eliminated, how many jobs created, how many affordable housing units build? How many houses made lead-safe? What are the desired health outcomes? Decisions are made on values, but decision makers still want the facts. Some of these facts may be included in a fact sheet. An example from the MMC is shown on slide 9.



THREE PARTS OF THE MESSAGE

In developing the message, it's useful to think of it as having three parts: the envelope, the contents, and the messenger.



- a. **Envelope. WHO will you be talking to? (Hand out envelopes to each participant.)** The envelope is addressed to the particular person or group you are trying to influence (this may or may not be the Ultimate Decision Maker) – like with the example – who you are talking to (your child or a chef) will determine how you address them. Be as specific as possible – consider the language, culture, age and sex of the primary audience. The envelope includes their address – how best to reach them. The return address is always Environmental Health Coalition. There may be many messengers, but it's always EHC's message.



- b. **Contents. WHAT are you going to say? (Hand out letter paper to each participant)** The purpose of the message is to influence that person or group to take a particular action. (Using Problem/Solution/Action PSA) The message describes the problem, gives EHC's proposed solution to the problem, and requests the addressee to take a particular action. The message is also tailored to the addressee – the things they will respond to.



- c. **Messenger. WHO is going to say it?** The messenger is responsible for delivering the message to the target audience and moving them to take action in support of us. EHC Leaders are its most important messengers because they have been personally affected by the problem and are developing the solution. Sharing your story is key to creating empathy and convincing them.



4 The Contents: Problem/Solution/Action

Total Time: 30 minutes

Participant Objective:

1. Learn how to develop a concise message that conveys the problem / solution / action that will influence others to take the requested action.



Tools:

- » PowerPoint Slides 15-18
- » Group Facilitator
- » PSA Messaging Worksheet



SIDE NOTE TO FACILITATOR:

This section could also be placed after the 'My Story' section of this training or saved to be paired with the Do's and Don'ts of Public Speaking in an additional session.

REVIEW THE "CONTENTS"

Remind participants that the "Contents" include the actual "message" and other materials that might help influence the audience (such as a fact sheet) or that will enable them to take the requested action (such as a petition, phone numbers for elected officials, a flyer on a particular action). The Message consists of the

- a. EHC/Messenger introduction (which is posted on the wall)
- b. A clear statement of the problem
- c. Solution
- d. Action requested for decision makers to take (PSA).

The message also includes personal stories – this will be covered in the next section. For now, the focus is on the Problem/Solution/Action.

ELEMENTS OF THE MESSAGE



The core of the message is expressed as the Problem/ Solution/ Action.

- a. **Introduction**
- b. **Problem/Solution/Action.** Discuss the components of the Problem/Solution/Action framework that can be used to move the target audience.
- c. **Tone.** Make it real. Add your emotions.
- d. **Your story**

EXAMPLE OF CONTENT – MMC ENERGY PLANT



- a. **The Message.** Point out the introduction and read the Problem/Solution/Action. Ask participants to critique the message: is the problem clear, does the solution reflect EHC's values, has a specific action been requested?



- b. **Additional Material.** No matter how the message is being delivered (in person, by mail, at a presentation, at a public hearing), the messenger will usually have a fact sheet that provides additional information and a way for the audience to take action.

Practice Developing a PSA

- a. **Instructions:** Distribute PSA Messaging Worksheet. Ask the participants to go back to the same groups they were in during the Power Session. Each group selects a recorder and a time keeper.
- b. **Group Facilitator Role:** Reviews the goal, objective and decision maker from the Power Analysis. Gathers up the completed PSA worksheet at the end of the activity and has a copy made for each participant in the group.
- c. **Group Activity.** Participants go through the following steps. Allow five-ten minutes for each step, for a maximum of 20 minutes.
 1. **Issue:** Brainstorm everything that's good about the chosen objective and things that might be problems or viewpoints of the opponents.
 2. **Identify Target Audience:** For this activity, the target audience for each group will be "undecided community members."
 3. **Develop PSA Message:** Use Guideline to develop the Problem/Solution/Action statements.
 4. **Review PSA Message:** Is there a clear, compelling problem statement? Is the solution consistent with the Objective of the Power Analysis? Is the action requested meaningful and something that participants could accomplish?

Influencing People to Take Action through Storytelling

Total Time: 10 minutes

Participant Objectives:

1. Understand that people make decisions based on emotion and values and that personal stories are a way to incorporate value and emotion into a message
2. Learn the elements of a good story



Tools:

- PowerPoint Slides 19-20

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WHAT INFLUENCES PEOPLE

The Problem/Solution/Action messages may all be accurate, but will that influence people to take action? People view the world in two ways.

- a. **Mind (science, technology, reason).** The mind is good for figuring out **how** to do something, but not why.
- b. **Heart (emotion, values).** **Why** people make decisions is based on values. Values are conveyed through emotion. People who have had the emotional part of their brain damaged can make long lists of pros and cons concerning an issue, but they are incapable of making a decision. In order to motivate people, the emotions of enthusiasm and hope need to come through.
- c. **Personal stories** are an excellent way to convey emotion and values.

ELEMENTS OF A GOOD STORY

How to develop emotional/value-based message by telling your own story. A good story has three elements:

- a. **A character** – This is your story; other characters could include family members, an influential teacher or religious leader. The listener needs to feel empathy with your story, so you need to include enough details and really share something about yourself.
- b. **A plot** – Something has to happen, choices have to be made. There is a challenge; you make a particular choice; there is an outcome. There need to be bridges between ideas and time. Stories have a beginning/middle/end.
- c. **Intention.** The story has a moral, it has a point.
- d. **Example.** The facilitator tells his/her story as an example. The story is 2 minutes or less. It explains why you became involved with EHC and your personal relationship to a problem EHC was working on.

SIDE NOTE TO FACILITATOR:

People must connect to the PSA emotionally before they will take action – facts are good for reinforcing their decisions, but not the basis of decision making. The personal stories of the participants are an excellent way to incorporate emotional/values-based elements into the message. In this section, the elements of a good story will be reviewed; in the following sections, participants will practice developing their own stories.

20

6

My Story

Total Time: 40 minutes

Participant Objective:

1. Give the PSA message value and emotion through incorporation of a story



Tools:

- » PowerPoint Slide 21
- » Easel paper – write list of common values and SAVE for next session
- » Video Recorder
- » PSA developed in Activity IV
- » Storytelling Guidelines



DEVELOPING/TELLING YOUR STORY

Participants reassemble into the groups from the previous activity. They should select a recorder and timekeeper. Distribute guidelines.

SIDE NOTE TO FACILITATOR:

The amount of time required for this activity depends on the number of break-out groups and the number of participants in each group. The following timing assumes 6 breakout groups with 5 participants each.



- Develop your story.** Each person has 8 minutes to develop a 2 minute story of why they became involved with EHC and their personal relationship to the problem identified in the PSA.
- Tell your story.** Each person has 2 minutes to tell their story (the timekeeper will time them and cut them off at the end of the 2 minutes; when it's the timekeepers turn to tell his/her story, another team member will be the timekeeper).
- Critiquing the story.** (Distribute Storytelling Guidelines) The other team members have 2 minutes to critique the story.
- Select your representative story.** The team selects one person to tell their story to the whole group.



REPORT BACK

- One person from each team tells his/her story. (Stories are video-recorded) Facilitator asks for one or two positive comments on each story – from the list of feedback questions, what did the storyteller best convey?
 - » Was there a character, plot, intention?
 - » What did you connect with in the story?
 - » What emotions were conveyed?
 - » Did you feel empathy?
 - » Did you get the point of the story?

- ▶▶ How could the story be improved?
- ▶▶ Were you convinced? Would you take the requested action?
- b. The whole group discusses the values conveyed in each of the stories.
- c. Facilitator summarizes:
 1. Each person's story is unique and expresses their values
 2. There are common values in the stories
 3. The more a person practices telling his/her story, the more confidence she/he will gain to share her/his story and it will more effectively convince others.

The Do's and Don'ts of Public Speaking

Total Time: 10 minutes

Participant Objectives:

1. Understand the basic principles behind effective public speaking
2. Realize that it's normal to be nervous before public speaking
3. Learn techniques to improve testimony and public speaking



Tools:

- Public Speaking Guide
- Easel Paper

IMPORTANCE OF PUBLIC SPEAKING

SIDE NOTE TO FACILITATOR:

This section could also serve as a stand-alone session before a group is about to give testimony or go to a hearing. The allotted time is 10 minutes however a much deeper discussion can be expected and more time allowed.

- a. Solicit some responses from the group as to the importance of public speaking.
- b. Explain that it allows us to publicly direct our messages to audiences we may want to influence.
- c. In our democratic system, almost all formal decision making processes include at least one Public Hearing
 - Public hearings are an opportunity for the decision-makers to hear the opinions of the general public on what action they are about to decide.
 - Governmental agencies, like the City Council, the Regional Water Board, or the Coastal Commission must conduct most of their business in public and allow the public to comment on what they are doing.
 - During this time, members of the public can make comments about an item before the body.
 - EHC often takes advantage of this opportunity to appear at public hearings and give oral testimony as a tactic to convince decision-makers of our position.
- d. Has anybody ever testified at a public hearing? Can you tell us:
 1. What was empowering about it?
 2. What was intimidating about it?
 3. What would they have done differently to improve their testimony?
- e. Has anyone done any public speaking in the past? Do you think the skills of public speaking and giving testimony are similar? One key difference is the time constraints.
- f. When you do public speaking you may have ample time to deliver your speech. In a public hearing you have time limitation, which means that you have to present the problem, the solution, the action and your persuasive arguments a concise manner!
- g. Let's talk about the one topic on everyone's minds: the fear of public speaking.

FEARS ABOUT PUBLIC SPEAKING

- a. Ask participants to share their public speaking fears and make a running list on easel paper, make sure you space the list so that you can write the suggestions people make under each of the fears. Take about 6 or 7 answers.

Possible common fears:

- » I'll mess up,
- » They'll laugh at me,
- » I'll drop my papers,
- » I'll get lost when I'm reading
- » I get so nervous that I forget what to say
- » So many people are watching and judging me
- » They will ask me questions
- » Etc.

- b. Now, can we come up with suggestions on how to overcome those fears? Let's start with the first one. Fear of messing up. Does anyone have any suggestions for this fear? **Write down recommendations under each of the fears listed.**

- c. **Handling Nerves** Here are some suggestions for how to give effective testimony (refer participants to worksheet on giving testimony in their notebooks)
1. Everybody handles their nerves a little differently, so don't worry if you start feeling nervous. A good way to make some of the nerves go away is to take some deep breaths, drink some water, and go through your speech in your head.
 2. Many of the fears we have about speaking in public are shared by others. Speaking in public isn't usually something that comes naturally; it's something that most of us do and get more comfortable with the more we do it. It's not something we are born to do, but something we learn to do, just like anything else.
 3. Also, most fears can be overcome by good preparation. Practice your speech out loud several times and type out or write your speech with big letters so that it is easy to read.
 4. Also, something that may occur while you are giving public testimony is that the audience may ask questions you don't have an answer for. The reality is that we may not know all of the answers to their questions. And, so, it is absolutely okay for you to say "I don't know the answer to right now, but I will find out/look it up for you."

8 Evaluation/Homework

Total Time: 10 minutes

Participant Objectives:

1. Review and evaluate understanding of core concepts.
2. Evaluate the delivery of the content, information, activities and materials.
3. Get a preview of the next session.



Tools:

- PowerPoint Slide 22
- Session Evaluation
- Comic Book Evaluation



EVALUATION

Pass out evaluation sheets for participants to fill out.

- a. Ask participants to take their time in filling out the evaluation, their input will allow us to continually improve the sessions.
- b. Thank participants for taking the time to fill it out, and we may use a quote from the evaluations in the SALTA publicity.



WRITTEN REVIEW

This week's comic book has 4 squares and provides the participant the opportunity to once again tell their story.

- a. Who was the biggest influence in my life?
- b. What values did I learn from him/her?
- c. How do those values motivate me to join EHC's efforts?
- d. The most important action I've done to date.

PREPARATION FOR NEXT WEEK'S SESSION:

- a. In this session, participants built on the Power Analysis they developed in the previous session to develop messages to influence their community members to support an EHC action and to actually take an action.
- b. Participants now have a basic message. In next week's session they will move from "My Story" to "Our Story" and learn how to develop relationships as a representative of EHC.