Annotated Agenda

**Using Personal Stories to Talk Issues**

**TIME ALLOTTED: 1 hour 15 minutes**

**PRESENTER(S):**

**GOALS FOR THIS SESSION:**

* By the end of this session, it is our goal that you...
  + Understand why talking about issues is important
  + Have a framework for tailoring your message to various audiences
  + Internalize OFA’s topline facts on Obamacare, Comprehensive Immigration Reform, and Climate Change through practice

**MATERIALS NEEDED:**

* Projector and PPT
* Butcher paper and markers
* Key Facts, by issue posted on walls

**PREPARATION NEEDED:**

* Write out topline facts for each priority issue on butcher paper and post on walls (If room is very large, may need multiple copies of each). Text of toplines is below:
  + **Obamacare:** On January 1st, 2014, millions of Americans saw new protections; new benefits and new quality healthcare plans kick in. For many of them, this was the first time they’ve been able to access a plan that would give them the security of being covered, at a price that is affordable. This was a huge moment, for them and for our country. People still have the opportunity to find coverage that works for them and their families and we are empowering people to talk to their loved ones about the importance of health insurance.
  + **Comprehensive Immigration Reform:** Together we can build a fair, effective and common sense immigration system that lives up to our heritage as a nation of laws and a nation of immigrants. The time to act on comprehensive immigration reform is now.
  + **Climate Change:** We are changing the conversation and organizing for action on climate and supporting the President’s plan to reduce the dangerous carbon pollution fueling extreme weather and threatening our communities and our economy.

**SKELETAL AGENDA:**

1. Introduction
2. Why is it Important that we talk about issues effectively?
3. The Right Approach for the Right Audience
4. The Ingredients of an Effective Conversation
5. Breakout Practice
6. Conversations that match the Medium
7. Debrief and Closing

**ANNOTATED AGENDA:**

**0:00 – 0:03 Introduction**

0:00 – 0:03 Personal story intro

* **[Slide 1]** [Trainer should give a two-minute version of their personal story as relevant to this module. Don’t forget to share challenge - choice - outcome and practice it like any other section!]

**0:03 – 0:10 Why is it important that we talk about issues effectively?**

0:03 – 0:05 What is it and why is it important?

* **[Slide 2]** Before we dive into any of this, I’d like to hear from you. What do you think it means to have effective conversations? [Pose question to audience and take answers from 1-2 people.]
* Excellent. **[Animation cue]** Out toplines are the framework we use to talk about the issues we work on.
* It also--this is a very important trait--reflects the values that America voted for in 2012. We can reference the information when talking about the President’s policies and plans as a way to emphasize the core values that underlie those policies and plans.
* And more importantly, the reason having effective conversations about issues is so important and we talk about it so much is because it helps us win issue campaigns, and we’ll see how throughout this session.
* **[Animation cue]** You’ll notice we have the topline facts for each of our three main legislative issue campaigns posted on the wall. We’ll refer back to them throughout this session.

0:05-0:09 Why effective conversations are important: they helps us win issue campaigns

* **[Slide 3]** We talk a lot about how we need to make sure the perception our Members of Congress have matches reality.
* We have another training session, called “Driving the Narrative,” where we talk about all the different channels through which we can push out our message in order to achieve that goal.
* But if our message isn’t compelling and effective, it’s not going to stick - no matter how many press hits we get or how much content we post online.
* So in this session, we’re going to focus on crafting an effective message. Which brings us to our goals for this session.

0:09-0:10 Goals and Agenda

* **[Slide 4]** So we have three main goals for today. It is our objective that by the time this session is over, you...
  1. Understand why talking about issues effectively is important
  2. Have a framework for tailoring your conversation to various audiences
  3. Internalize OFA’s topline facts on Obamacare, Comprehensive Immigration Reform, and Climate Change through practice
* **[Slide 5]** So to achieve those goals, here’s a look at the agenda:
  1. We just talked about what defines these conversations and why they’re important
  2. Next, we’re going to talk about crafting the right message for the right audience.
  3. Then, we’ll dissect the ingredients of an effective conversation,
  4. We’ll break out and practice using those ingredients to have an effective conversation,
  5. We’ll talk about the different mediums we have for pushing out that information,
  6. And then we’ll debrief and close!
  7. [**Animation cue]** So with that, we will dive right into The Right Message for the Right Audience!

**0:10 – 0:20 The Right Approach for the Right Audience**

0:10 – 0:12 Who is our audience?

* **[Slide 6]** When we talk about issue campaigns, we talk about the need to persuade our member of congress.
* Now, we’re talking about doing that persuasion by reaching three groups of people with our topline facts:
  + We want to reach our members of congress because they have the power to make the decision that can give us the change we want.
  + We want to reach anyone who can influence the decision maker. Our training session on “Building Strategic Issue Campaigns” helps us identify who these people are who have the most influence over decision makers. We want to get those people on board with our push and help us persuade the Member of Congress to vote the right way.
  + And finally, we want to reach people who already support us, and move them to take action.
* No matter who we are talking to, the end goal is moving that member of congress. That means we talk to group 2 so that they can talk to group 1 **[animation cue]**, we talk to group 3 so that they can talk to group 2 who can then talk to group 1 **[animation cue]**, or so that they can organize an event that directly conversations to group 1 **[animation cue].**

0:12-0:13 How do we tailor our conversations? Intro to the triangle

* **[Slide 7]** Now that we understand our audience, let’s talk about how we tailor our message to different audiences.
* Now, when we think about what a conversation accomplishes, it helps to imagine this triangle. In the lower left of this triangle there is you, the messenger; in the lower right of this triangle, there is your audience, and then at the top of the triangle there is the issue you’re fighting for - the change you seek to achieve.
* Your goal, whether you’re talking to a Member of Congress or a volunteer prospect, is to make them feel connected to the issue; to make them feel some support for your issue - or maybe just *stronger* support for your issue.
* [**Animation cue]** Now, you’re already out there organizing for this issue. You are bought in, you’re gung ho.
* **[Animation cue]** When you persuade effectively, you are building a connection with your audience.
* **[Animation cue]** And once you’ve made a connection with your audience, you can start to build a connection between your audience and the issue.
* But how do these connections form? What is the glue that keeps these lines together?
* **[Animation cue]** It’s values. Values like fairness. Opportunity for all. Responsibility. Everyone playing by the same rules. These are things we can all agree on.
* And so, in order to get to a place where you are getting your audience to connect with your issue on values, you have to work backward.
* So go ahead and take out a sheet of paper. We’re going to do a couple of quick exercises.

0:13-0:20 Persuasion Triangle Reflective Exercises

* **[Slide 8]** Okay, so for the first exercise, you’re going to draw your own triangle.
  1. The messenger is you. Go ahead and write your name in the lower left.
  2. The issue is Comprehensive immigration reform. Go ahead and write “CIR” at the top.
  3. And the audience is your Member of Congress, Go ahead and write down your MOC or Senator’s name in the lower right.
  4. Now, the first thing we’ll do is take about 30 seconds thinking about CIR, and what values it represents. Take 30 seconds to write those values down next to where you’ve written “CIR” at the top. [Wait 30 seconds.]
  5. Okay, now that you have your list of values, turn your mind to your Member of Congress. Which of those values do you think would resonate most with your MOC? Take about 30 seconds to reflect, and then write those values down. [Wait 30 seconds.]
  6. Now, these are the values you need to focus on when you’re talking to your member of congress about CIR. But it can’t be broad, sweeping values only - it has to be personal. So take about one minute to take one or two of those values, and think about how you would ask your MOC to support CIR, while incorporating the values you share with that MOC, and a personal story or anecdote to show that you share those values. [Wait one minute.]
  7. Anyone want to take a shot at sharing? [Ask for one volunteer to share.]
  8. Fantastic, okay, now we’re going to move on to our second exercise.
* **[Slide 9]** For the second exercise, we’re going to change it up just a little bit. Go ahead and draw a fresh, new triangle.
  1. The messenger is still you, so you can write your name in the lower left.
  2. The issue this time, is Climate change.
  3. And the audience is a new volunteer who has become frustrated about the Keystone Pipeline, saying the President hasn’t shown leadership on it and frankly hasn’t done a lot on climate change in general.
  4. Now, go ahead and take 30 seconds to think about the President’s work and OFA’s campaign on Climate Change. Think about the values represented there. Take 30 seconds to write down those values at the top of your triangle. [Wait 30 seconds.]
  5. Now, there is a big difference between the MOC and this volunteer - apart from the likely ideological differences!
  6. For the MOC, it was pretty easy to identify values that might resonate with the MOC, because s/he is a public figure. You probably know a thing or two about them because they represent your district or state.
  7. But for this new volunteer, how can you get a sense of her values? [Ask the audience to raise hands and share ideas.]
  8. Yes - we have to ask questions! So for this round of the exercise, go ahead and use the next 30 seconds to brainstorm the questions you would ask in order to get a sense of this person’s values, and whether any of them align with the values of the climate campaign you wrote at the top. [Wait 30 seconds.]
  9. Okay, now you’ll need to use a bit of imagination - I’m going to need you to visualize asking these questions, and imagine you’ve gotten some answers, maybe had a decently substantial conversation. We’ll do some creative writing here - write down what values you think this make believe person might hold that align with the values of the climate campaign - just like we did with the MOC. Take about 30 seconds to do that. [Wait 30 seconds.]
  10. Okay, now finally, think about which of those values you share, and what personal stories or anecdotes you can share with this person when you ask her to stay involved and come back for next weekend’s event. Take about one minute for that. [Wait one minute.]
  11. Would anybody like to share? [Ask for a member of the audience to report back the values they picked, the questions they asked, and what their pitch looked like.]
  12. Excellent, okay! So these were both solid examples, and in the next section, we’re going to get into a little more nuance for crafting these conversations, and everyone will give it a try.

**0:20 – 0:35 The ingredients of an effective conversation**

0:20 – 0:25 Intro to the 4-part message framework

* [**Slide 10]** The values portion is so important, and it can be challenging to get used to weaving in, so we wanted to cover it first.
* But how many people struggle to piece together their values with a personal anecdote with the issue in that last exercise? Go ahead and raise your hand if you did.
* Yeah - it’s not easy, especially in a minute. So to provide a little bit more structure to help you combine all those things, we’re going to look at the 4-part framework.
* [**Slide 11]** Here’s a look at the four pieces:
  1. **[Animation cue]** Acknowledge & Relate: Acknowledge the problem our nation faces and relate it to your audience. Others will define the problem differently to persuade the public that their solution is best for the country.
  2. **[Animation cue]** Values: Always bring the conversation to the *value* that you share with the President, and connect that value to the voter’s issues and interest
  3. **[Animation cue]** Pivot to Supporting Arguments: Shift to key facts or arguments in support of the values you laid out.
  4. **[Animation cue]** Draw Contrast: Draw the appropriate *contrast* with the status quo. What will happen if we do not act?
* Now, in our second exercise earlier, what did we talk about needing to do in order to identify those shared values? [Ask the audience to raise hands and share ideas.]
* That’s right - we need to ask questions, and so we’ve actually placed the word “Probe” **[Animation cue]** right here on the side as a vertical arrow that is part of every step.
* Now, there will be situations where our conversations will be a one-way conversation. Press conferences, Letters to the editor, blog posts, op-eds, emails, etc. In those cases, the questions and research probably need to come *before* the conversation. But if not - if you’re talking to vol prospects or if you’re asking a question at a town hall - we need to make sure we’re asking questions along the way, in order to best craft an authentic, personal conversation that resonates with our audience.

0:25 – 0:33 What it looks like for CIR

* **[Slide 12]** Now let’s take a look at the four parts in action, with Comprehensive Immigration Reform as an example.
* **[Animation cue]** The first step is Acknowledge and relate.
  1. **[Animation cue]** Is there a volunteer who would like to read out the first sentence? **[Animation cue]** The second? **[Animation cue]** The third? [Call on volunteers to read each sentence.]
  2. What these sentences do is they acknowledge the problem. If talking to someone opposed to reform, or with negative things to say about reform, it’s important to acknowledge those concerns as well.
  3. What are some good key phrases you can think of to show that we acknowledge and relate to someone else’s concerns, even if we may not agree with them? [Ask the audience to raise their hands and share ideas. Some great phrases to look for are “I understand where you’re coming from,” or “I hear your concern.”]
  4. It’s also important to avoid *over-*validating their concern. We want them to feel like we’ve heard them and are not judging them, but if they say something that sounds really misinformed, we don’t have to say, “Oh, I’ve heard a lot of people say that too!”
* Okay, let’s move on to the second step:
  1. **[Slide 13]** Values.
  2. **[Animation cue]** Who’d like to read the first phrase? **[Animation cue]** The second?
  3. Great. What are the key words you see here that resonate as values to you? [Ask participants to raise their hands and share their ideas. Rapidly call on 3-4.]
* Excellent. So once we’ve acknowledged the problem or the person’s concern, and we’ve found common ground with them on values, we have the space to pivot to the next step.
  1. **[Slide 14]** Pivot to supporting arguments.
  2. **[Animation cue]** Who can read the first sentence? **[Animation cue]** The second sentence? **[Animation cue]** The last sentence at the bottom there?
  3. Great. Now, quick question - if you were in a conversation with someone on this topic, would you use one, two, or all of these points? Why don’t you answer with a show of hands? [Ask audience to hold up a 3, 2 or 1.]
  4. So, those are all right answers. But don’t worry - it’s also okay to use just one of them.
  5. The important thing is that you actually don’t use *more* than this. If you go beyond three supporting arguments, you’re just droning on about facts and statistics and your message ceases to be compelling or digestible. So stick with 1-3, no more.
* **[Slide 15]** The last piece is contrast.
  1. **[Animation cue]** So can someone please read this last sentence for me? [Call on someone who hasn’t spoken, to read this sentence.]
  2. Why is it important to include contrast?
  3. This is especially important in issue organizing, when we’re organizing around shifting definitions of success. It’s not as simple as electing a candidate - sometimes a given piece of legislation isn’t exactly what we all hoped for.
  4. But for someone who is by and large with us, this contrast is a great tool for reminding them that this isn’t a choice between the good and the perfect - it is a choice between the good and the status quo.
* So those are the pieces of the 4-part framework.

0:33 – 0:35 Other best practices for effective conversations

* **[Slide 16]** We’re going to break out and practice in a minute, but I’d like to share some other best practices before we do that.
* Firstly, when in doubt, stick to using deeply held moral values as your primary arguments.
* Secondly, Simplify complex issues with metaphors and visual language to make it more digestible to your audience.
* Another thing to keep in mind: Define the problem and the solution. Without defining the problem, your arguments are misdirected and weakened in general. Without solutions, you lose credibility because you don’t appear ready to offer solutions instead of only complaints.
* And finally, as we discussed earlier, keep your points few and short. Avoid making more than 3 key points in any conversation, or you risk your audience losing interest.

**0:35 – 0:55 Breakout Practice**

0:35 – 0:39 Breakout setup

* [**Slide 17]** Okay, we’re going to do some practice in pairs!
* Please don’t move until I say go.
* In a minute, we’re going to display a scenario on the screen, and you’re going to practice using the four steps to respond to them.
* You’ll have 2 minutes to practice your pitch, then 1 minute to hear your partner’s feedback, and then we’ll come back together.
* Try to find a partner you don’t already know!
* Okay, take 30 seconds to find your partner, figure out where you’re both going to sit, and then turn your attention back to the front of the room.
* And - GO! [Give participants 30 seconds to find their partners. Then regain attention back at the front of the room. Best practice: Shout, “If you can hear me, clap once! If you can hear me, clap twice!” As many times as needed until room is silent.]
* **[Slide 18] [Animation cue]** [Once everyone has a partner, read out the first scenario.] You’re speaking at a community information session about the ACA, and a few attendees are fearful of costs skyrocketing under the law.

0:39-0:55 Breakout practice and report-back

* [Circulate the room while participants practice their discussions. Make an announcement when it is time for them to switch to feedback.]
* [After three minutes, re-gain attention at the front of the room.] Okay, now, for the second scenario, you’re going to switch. So if you were a feedback giver last time, you’re going to practice your pitch this time.
* **[Animation cue]** Here’s the second scenario: You’re at an action planning session for a CIR event, talking to volunteers. A new attendee expresses concerns that immigration reform isn’t good for jobs in the United States.
* Again, you have 2 minutes to practice, and one minute for feedback from your partner. Then we’ll come back together.
* Okay - go!
* [Circulate the room while participants practice. Make an announcement when it is time for them to switch to feedback.]
* [After three minutes, re-gain attention at the front of the room.]
* Who would like to nominate their partner to share their discussion from the first scenario? [Find a nominee and invite them to the front of the room.]
* Great - now this person is going to share her response. The rest of us are going to listen for the four parts, and use our hands to signal when we hear them.
  1. When you hear the first step, Acknowledge and relate, hold up a 1.
  2. When you hear the second step, Values, hold up a 2.
  3. When you heard the third step, Pivot to supporting arguments, hold up a 3.
  4. And when you hear the contrast, hold up a 4.
* [Repeat for one person from scenario 2.]
* Excellent job. Well, I encourage you to keep trying to weave this framework into your pitches and your conversations moving forward.
* For now, we’re going to switch gears and talk about how we tailor these conversations based on the medium through which we’re conveying our information

**0:55 – 1:10 Conversations That Match the Medium**

0:55 – 0:59 Breakout setup

* [**Slide 19]** Now, we’re going to switch gears and think about how we tailor these conversations to different formats.
* Our topic for this exercise will be climate change.
* We’re going to break out into five groups for this exercise.
* Please do not move until I say go.
* Here are the instructions:
  1. If your first name starts with a letter between A and D, you are Team 1, and you’ll meet in [indicate corner of the room].
  2. First name between E and I, you are Team 2, and you’ll meet in [indicate corner].
  3. First name between J and M, you are Team 3, and you’ll meet in [indicate corner].
  4. First name between N and R, you are Team 4, and you’ll meet in [indicate corner].
  5. First name between S and Z, you are Team 5, and you’ll meet in [indicate corner].
  6. You will have 30 seconds to get into your corner silently, and then turn your attention back to the front for more directions.
  7. Okay - GO! [Give participants 30 seconds to get into their groups.]
* **[Slide 20]** Okay, so here is the medium you’re going to think of.
  1. Team 1 will think of a Press Conference. The audience is a MOC
  2. Team 2 will think of a volunteer ask on the phone. The audience is a volunteer prospect.
  3. Team 3 will think of a tweet. You should actually compose a tweet of 140 characters or less. Your audience is people who might contact their MOC.
  4. Team 4 will think of a Facebook post. Your audience is vol prospects.
  5. Finally, Team 5 will think of a blog post. Your audience is volunteers, and also people who might contact their MOC
  6. You will have five minutes to craft your message!
  7. Okay - go!

0:59– 1:10 Breakouts and report-back

* [Circulate the room while teams work on their messages. Give time signals when there are 2 minutes, 1 minute, and 30 seconds remaining.]
* [Ask a reporter from each group to share what their group came up with.]
* Excellent, now go ahead and take your seats.

**1:10 – 1:15 Debrief and Closing**

1:10-1:15 Key takeaways, next steps and closing

* **[Slide 21]** We’re going to go ahead and recap what we learned and wrap up!
* **[Slide 22]** Three important key takeaways from today:
  1. First, effective conversations help us motivate others to take action, whether it’s getting an MOC to vote the way we want, getting those who can influence an MOC to do so, or getting a supporter to volunteer, it helps us meet our goals.
  2. Secondly, our pitch must always be personal, values-based, and tailored to the audience.
  3. And finally, just remember those four steps: acknowledge and relate, point to shared values, pivot to supporting arguments, and contrast with the status quo.
* **[Slide 23]** [Insert the next steps you want people to take in order to apply these skills to action.]
* **[Slide 24]** If you have remaining questions we haven’t been able to answer, you can follow up with your OFA point of contact, or submit them in your evaluation at the end of the day.
* **Thank you!**