

## ACKNOWLEDGEMENTS

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# ENGAGEMENT ORGANIZING TRAININGS

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## *Learning and Teaching as Organizers*

Some points on how we learn and teach.

**1) Organizing is a practice – a way of doing things. It's like learning to ride a bike.** No matter how many books you read about bike riding, they are of little use when it comes to getting on the bike. And when you get on the first thing that will happen is that you will fall. And that's where the "heart" comes in. Either you give up and go home or you find the courage to get back on.

**2) The training and the content are designed to model what we teach.** We begin with explanation (up-front presentation), we observe models (role plays), we practice (small group work), and then we reflect on our practice (debrief). We model leadership structure in our training, for example, by distributing roles and by both confronting participants with new challenges as well as support (coaching) to meet them. Our modeling of 'reflective practice' encourages participants to do so as well.

**3) Organizing is a framework – a way of understanding ourselves as actors in the world.** In engagement trainings we treat everyday practices – forming a relationship, telling a story, making a plan—as objects of mindful reflection.

**4) Our workshop is also organized as a campaign - a way of mobilizing time, resources, and energy to achieve a specific outcome**—It is an intense stream of activity that begins with a foundational period, builds to a kick-off, builds to periodic peaks, and culminates in a final peak, followed by a resolution. Our workshop will follow the same pattern, with each practice building on what went before and creating a foundation for what comes next. It is structured in leadership teams just like the infrastructure driving a campaign.

**5) This workshop creates the opportunity for intense relationships with participants.** We need to respect these as "public relationships," not "private relationships" – both **close and professional**.

**6) This workshop brings to the forefront "hot topics"** such as political differences, ethnicity, class, gender, sexuality, and religion on a fairly regular basis - keeping in mind that your role is *not* to problem solve those issues but to facilitate a learning discussion amongst the other participants.

**7) The evaluation of an effective workshop – as in effective campaigns – rests on three measures:** Did the individuals learn? Did their teams grow stronger? Were the outcomes achieved?

## WORKSHOP GOALS

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Questions of *what I am called to do, what is my community called to do, and what we are called to do now* are at least as old as the three questions posed by the first century Jerusalem sage, Rabbi Hillel:

- *If I am not for myself, who will be for me?*
- *When I am for myself alone, what am I?*
- *If not now, when?*

This training offers participants an opportunity to develop their capacity to lead by asking themselves these questions at a time in their lives when it really matters - and learning how to ask these questions of others.

Public Narrative is a system of crafting and telling your story, developed by Marshall Ganz and honed over years in the field. It's the values-based practice of storytelling used in successful organizing campaigns from Cesar Chavez and the United Farm Workers, to Barack Obama's campaigns, to DREAMers and many others.

### **Goals for this workshop:**

- Understand why public narrative (the story of self, us and now) is an essential leadership skill.
- Learn how to tell your story, the story of your community, and the story of your campaign/project to motivate people to action with you.
- Learn how to coach others in telling their story.
- Learn how to utilize your story on a variety of platforms, including in 1:1's and group meetings, in writing effective emails and developing social media content.
- Outline an action plan to use story in your leadership, advocacy and/or organizing efforts beyond the training.

### **Personal Goals:**

*What are your hopes for this workshop for yourself, your organization, and your local work?*

*What skills are you interested in learning?*

*What can you help teach others?*

# GLOSSARY OF ORGANIZING LANGUAGE

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*In organizing, common words are used in very specific ways, and some unusual words are used that we all need to know...*

**anger:** Not rage but outrage with injustice. Indignation. Constructive anger expresses the tension in experience of “the world as it is” and “the world as it ought to be.” It can, when coupled with hope, find resolution in action.

**clear no** (v fuzzy maybe): When trying to avoid a commitment we often find it hard to say ‘no’ and so say ‘maybe’ instead. An organizer prefers a clear ‘no’ now to a polite ‘maybe’ that later reveals itself to be really a ‘no.’ This means organizers request specific commitments so all will know if the commitment is honored or not.

**coaching:** Coaching is a way to intervene with individuals or teams by offering specific feedback and asking questions that can improve their practice. Coaching is motivational, strategic, or informational depending on the nature of the problem. It often takes the form of asking ‘why?’ questions to elicit understanding, rather than simply offering advice. Contrast with facilitation.

**constituency:** Constituents are the people whom we organize, whose leadership we develop and to whom we are accountable. Constituents are people who associate on behalf of common interests, commit individual resources to acting on those interests, and have a voice in deciding how we organize. In organizing, this word is oriented toward action (VS political geography or affiliation). It is derived from “con stare” — to stand together.

**emotion:** Emotions are how we experience the value we place on people, things, and experiences. They provide us with the “moral” information we need to make choices, the “moral” energy to act on those choices, and the principal means by which we can move others to act. In organizing, emotions are not a burden to be hidden but a resource to be cultivated. As brain research shows, people who can’t experience emotion can’t make choices because choices depend on value judgments for which emotional information is crucial.

**facilitation:** Facilitation is the art of managing group interactions to achieve a specific outcome. It requires boundary setting, eliciting participation, focusing attention, interpreting what is being said, probing, and summarizing. Contrast with coaching.

**leadership:** taking responsibility to engage others in achieving shared purpose under conditions of uncertainty

**organizing** (v mobilizing): A process through which people with shared values and interests develop leadership, establish strategy and structure, and mobilize their resources to generate the power they need to achieve a goal they have set. All organizing involves mobilizing but not all mobilizing is organizing.

**public narrative:** A leadership skill for motivating others to join you in action. A person’s public narrative consists of a linked story of self, us, and now — and it’s different for every audience the teller is trying to motivate.

**relationship:** An exchange of interests and resources based on a commitment sustained over time. With ongoing development and use, relationships eventually become resources themselves.

**relational commitments:** Organizing requires building relationships based on a shared commitment to collaborate. Relationship building is not about my “extraction” of your resources nor your “extraction” of mine. It is about making choices to work together on behalf of a common purpose.

**resource:** Anything we can use to achieve something else. Moral resources grow with use (*e.g.* relationships, commitment, understanding). Economic resources diminish with use (*e.g.* money, materials). In organizing, time is often our most precious resource. Whereas business pursues objectives with as few people as possible because people are seen ‘costs’, organizing pursues objectives with as many people as possible because people are seen as ‘resources.’

**snowflake:** A way of visualizing interdependent leadership (as distinct from the ‘dot-in-the-centre’ described above) that develops the leadership capacity of all involved.

**story of SELF:** The element of public narrative that explains why you as an individual are called to a specific project, campaign, vocation, or campaign. What stories can you tell of your life experience that can enable others to understand the “moral sources” of your mission? It is not a biography, but requires enough “framing” for the listener to understand its role in your journey to this point. It requires the courage to risk the vulnerability that goes with transparency. It answers the question “why me.” It works if others “get you.”

**story of US:** The element of a public narrative in which a story is told to evoke a shared experience of values that motivate your “constituency.” A story of us is drawn from shared experiences, traditions, events. It requires the courage to risk an empathetic interpretation of the experience of your constituency. It answers the question “why us?” It works if others “get each other.”

**story of NOW:** The element of public narrative in which the story that is told occurs right now. It draws on stories that can create the urgency of challenge, as well as the substance of hope. It focuses on the choice required to act on the challenge in a spirit of hope. It requires the courage to risk confronting others with the need to choose. It answers the question “why now.” It works if others commit to action.

**training** (v coaching and facilitation): As distinct from coaching and facilitation (described above), training is an umbrella term for engaging a discrete group of people towards clear established learning objectives. Good training recognizes the resources and agency of those receiving the training and often invites them to become trainers to develop the particular leadership skills and practices in others.

**value** (v interest): The affective commitments that shape our lives and our campaigns. Examples are justice, dignity, equality, cooperation, freedom, and harmony. Values animate interests (*e.g.*, because I care about dignity I pursue an interest in students having choices about their future education and careers). Emotion is how we experience values.

**vision** (v outcome): Vision of the campaign is the “dream.” What will the world look like if the value the campaign is trying to promote is upheld? An outcome is a smaller and more measurable goal. Many outcomes combine together to make the vision; therefore each outcome should contribute a small part to the vision. A campaign strategy is designed around multiple measurable outcomes that, when combined together, make the vision.

*First Draft July 2010 by Marshall Ganz, Chris Lawrence-Pietroni, Zac Willette, & Shivani Kumar | additions and refinements welcome*

# THE STORY OF SELF

# PUBLIC NARRATIVE & STORY OF SELF

*Why am I called?*

## OBJECTIVES:

- Learn the basics of how public narrative works: values, emotion & story structure
- Learn criteria for an effective story of self and coach others on improving their storytelling
- Practice and get coaching on your own story of self

## EACH OF US HAS A COMPELLING STORY TO TELL

Each of us has a story that can move others to action. As you learn this skill, you will be learning to tell a story about yourself, the community you organize with, and your strategy that motivates others to join you in creating change. In addition, you will gain practice in listening, and coaching others to tell a good story.

## PUBLIC NARRATIVE IS A PRACTICE OF LEADERSHIP

Leadership is about accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty. Narrative is how we learn to make choices and construct our identities and purpose—as individuals, as communities and organizations, and as nations.

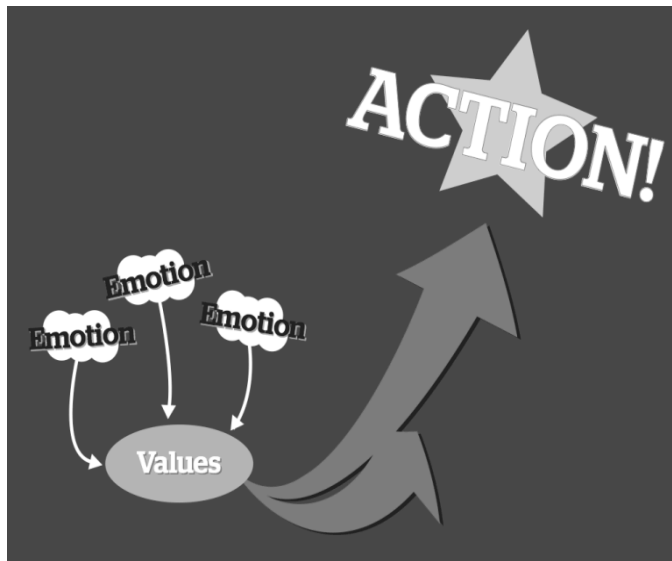
What does public narrative have to do with this definition of leadership? You can't ask others to follow you if they don't understand what your intentions are, and why you are called to lead.

## THE HEAD & THE HEART

There are two ways we understand the world: through our head (strategy & analysis) and through our heart (story & motivation). To enable others to achieve shared purpose, public leaders must employ BOTH the head and the heart of their constituency in order to mobilize others to act on behalf of shared values. In other words, they engage people in interpreting why they should change their world (their motivation) and how they can act to change it (their strategy). Public narrative is the “why”—the art of translating values into action through stories.



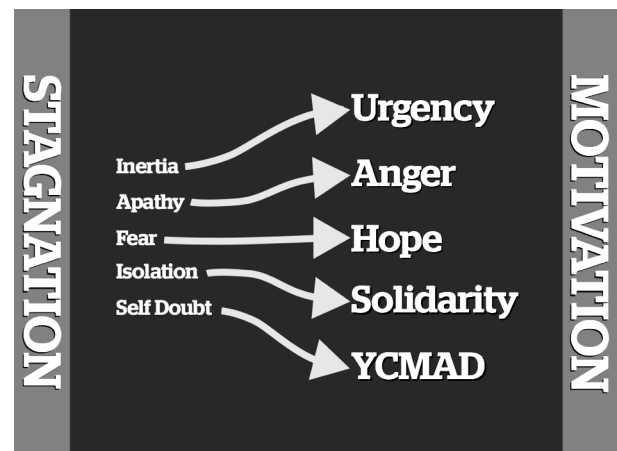
## VALUES INSPIRE ACTION THROUGH EMOTION



We don't think our values; we feel our values. Often we don't realize what we value in the world until we hear a story or witness an injustice that stirs emotions within us. Emotions inform us of what we value in ourselves, in others, and in the world, and they enable us to express the motivational content of our values to others. Because stories allow us to express our values not as abstract principles, but as lived experience, they have the power to move others to action.

## SOME EMOTIONS INHIBIT ACTION, OTHERS MOTIVATE ACTION

Public leaders often encounter individuals or groups where mindful action is inhibited by inertia, apathy, fear, isolation, and self-doubt. The job of a leader is not to tell people to stop feeling this way but rather use storytelling to move people from feelings of stagnation to feelings of motivation - urgency, anger, hope, solidarity, and YCMAD (you can make a difference). The language of emotion is the language of movement—they actually share the same root word. Stories mobilize emotions of action to overcome emotions that inhibit us from mindful action.



## PUBLIC NARRATIVE COMBINES A STORY OF SELF, US AND NOW

### STORY OF SELF

By telling a “story of self” you can communicate the values that move you to lead. Public leaders face the challenge of enabling others to “get” the values that move them to lead. Effective communication of motivating values can establish grounds for trust, empathy, and understanding. In its absence, people will infer our motivations, often in ways that can be very counterproductive. Telling our story of self can help establish firm ground for leadership, collaboration and discovering common purpose.



*Public Narrative*

Every one of us has a compelling story of self to tell. We all have people in our lives (parents, grandparents, teachers, friends, colleagues) or characters we love, whose stories influence our own values. And we all have made choices in response to our own challenges that shape our life’s path—confrontations with pain, moments of hope, calls to action.

The key focus is on our choices, those moments in our lives when our values moved us to act in the face of challenge. When did you first care about being heard? When did you feel you had to act? Why did you feel you could act? What were the circumstances, the place, the colors, sounds? What did it look like? The power in your story of self is to reveal something of those moments that were deeply meaningful to you in shaping your life—not

your deepest private secrets, but the events that shaped your public life. Learning to tell a good story of self demands the *courage of introspection*, and of sharing some of what you find.

## STORY OF US

By telling a “story of us” you can communicate values that can inspire others to act together by identifying with each other, not only with you.

Just as with a story of self, key choice points in the life of a community—its founding, crises it has faced, or other events that everyone remembers—are moments that express the values shared. Consider stories that members of your group have shared, especially those that held similar meaning for all of you. The key is to focus on telling a specific story about specific people at a specific time that can remind everyone – or call to everyone’s attention – values that you share. Telling a good story of us requires the *courage of empathy* – to consider the experience of others deeply enough to take a chance at articulating that experience.

## STORY OF NOW

By telling a “story of now” you can communicate an urgent challenge we are called upon to face, the hope that we can face it and the hopeful outcome we can create together, and the choice we must make to act now.

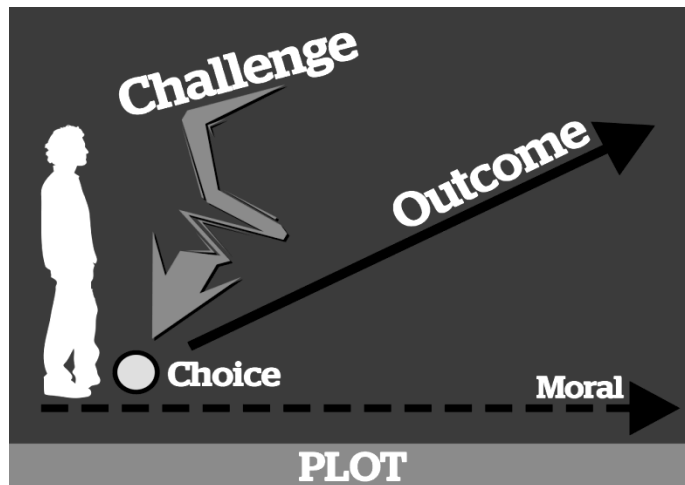
A story of now requires telling stories that bring the urgency of the challenge alive: urgency because of a need for change that cannot be denied, urgency because of a moment of opportunity that may not return. A story of now also offers hope—not make-believe hope, but real, plausible hope, often grounded in what others are already achieving, grounded in the courage of others’ actions, and in the strategic vision of what we can achieve together. At the intersection of the urgency and the promise of hope is a choice that must be made – to act, or not to act, to act in this way, or in that. Telling a good story of now requires the *courage of imagination*, or as Walter Brueggemann named it, a prophetic imagination, in which you call attention both to the pain of the world and also to the possibility for a better future.

## STORY STRUCTURE: CHALLENGE, CHOICE, OUTCOME

Every human story has a plot. A plot begins with a challenge that confronts a character with an urgent need to pay attention, to make a choice for which s/he is unprepared. The choice yields an outcome, and the outcome teaches a moral.

A good story allows the listener to empathetically identify with the character and “feel” the moral. We hear “about” someone’s courage; we are also inspired by it.

The story of the character and his or her choices encourages listeners to think about their own values and challenges, and inspires them with new ways of thinking about how to make choices in their own lives.



### Incorporating Challenge, Choice, and Outcome in Your Own Story

There are some key questions you need to answer as you consider the choices you have made in your life and the path you have taken that brought you to this point in time as a leader. Once you identify the specific *relevant* choice, dig deeper by answering the following questions.

**Challenge:** Why did you feel it was a challenge? What was so challenging about it? Why was it your challenge? **Choice:** Why did you make the choice you did? Where did you get the courage (or not)? Where did you get the hope (or not)? Did your parents or grandparents’ life stories teach you in any way how to act in that moment? How did it feel? Where is the hope?

**Outcome:** How did the outcome feel? Why did it feel that way? What did it teach you? What do you want to teach us? How do you want us to feel? Where is the hope?

**A word about challenge.** Sometimes people see the word challenge and think it means describing the worst misfortunes of our lives. Sometimes those are the moments that most shaped us. But keep in mind that a struggle might also be one of your own choosing – a high mountain you decided to climb as much as a valley you managed to climb out of. Many things may have been a challenge to you and can be the source of a good story to inspire others.

# VIDEO REVIEW

## STORY OF SELF, US, AND NOW

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We'll be watching a story of Self, Us and Now. While you watch it, think about the elements of SELF – US – NOW that you hear in this story.

SELF	US	NOW
<ul style="list-style-type: none"><li>• <i>What experiences and values call this person to leadership?</i></li><li>• <i>What choice points does the speaker include to show, rather than tell us his or her values?</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Who is the “us” that the speaker identifies?</i></li><li>• <i>What are the common values the speaker appeals to? How?</i></li><li>• <i>What challenges and hopes does this “us” or community share?</i></li></ul>	<ul style="list-style-type: none"><li>• <i>What urgent challenge does this speaker identify?</i></li><li>• <i>How does he or she make that challenge real?</i></li><li>• <i>What gives us real hope that we can do something?</i></li><li>• <i>What is the first step that each person can take to be part of the solution?</i></li></ul>

0. What was the speaker’s purpose in telling these stories? What was s/he moving people to do?
1. What values did this story convey? How? By telling or showing?
2. What details or images in particular reflected those values?
3. What were the challenges, choices and outcomes in each part of his story? What morals do the outcomes teach?

## SAMPLE STORY OF SELF: Lilian Molina

*As told at Powershift 2011: a gathering of 10,000 U.S. climate activists.*

Greetings. My name is Lilian Maria Molina and I am the Environmental Justice Director at Energy Action Coalition. I am part Mayas-Chorti, Lenca and Palestinian, was born in Honduras, Central America and moved to the United States at the age of 5 with my mother. For the first couple years my mom and I would take an hour-long ride on a two-floor train; I would always rush to the top floor, look out the window, and envision what I would do at our destination. I would imagine the cartoons I would watch, salivate over the Kudos and Pringles I would be able to eat, and think about all the great toys I would play with. Then one day, as I was playing with a fully equipped Barbie Mansion, my mom reached over and handed me a bottle of Windex and paper towels; at that moment I realized that our hour-long train ride wasn't a field trip, it was a commute to work. My mom and I were there to clean houses not to play.

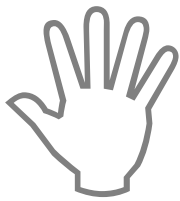


From that moment on I started to notice that things looked very different in different parts of town. I wondered why some families lived in three floor homes, while I lived in a one-bedroom basement apartment with two families. I wondered why the park equipment in my neighborhood was always broken, but was fancy and new on the other side of town. I wondered if people in the neighborhood where my mom and I cleaned houses had to worry about La Migra coming to their jobs or their homes. I wondered if the kids at these houses ever had to miss school to translate for their parents. I wondered why the police didn't arrest kids around these houses for standing on the corner but my friends back in the neighborhood were arrested all the time. I slowly started to understand that these were two separate worlds.

As I got older, I would refuse to take the hour-long train ride with my mom, instead I would hang out with my friends in the neighborhood. When I was 12, my mom noticed that I was starting to get involved in some risky activities. She decided to send me to Honduras for the summer to spend time with Mi Abuelita (grandma). That summer Mi Abuelita, a Natural Healer and Master Gardener, helped me connect to my ancestral roots and taught me how to love nature through gardening. I learned about all the different plants that she used to help heal people and deliver babies - it was an eye-opening experience. That summer I also realized that some of the people that looked like my family and I wore suits to work and lived in houses rather than apartments.

When I came back to the U.S, I returned to hanging out with my friends; but when I was 16, I decided I was done watching my friends get beat up, get beat by the cops, or arrested. My friends and I started hosting different activities to keep our friends from joining street gangs. Throughout high school we organized different events, from parties, to walkouts to bring awareness to the violence in our communities. Around this time I remembered how the garden that Mi Abuelita introduced me to helped me to heal, and started wondering if a garden in our community could have the same impact for other young people. I got super excited and started looking for plots of land around the school. But in my search I learned that most of the land in Little Village was contaminated with industrial pollution. I thought to myself, "You have to be kidding me, on top of all of the issues I was aware of, our land is also polluted? We have poor education, gang violence, police brutality, immigration raids, militarization of schools and we also have contamination in our community? What the heck else could be wrong?" I learned that what my community was experiencing is called Environmental Racism and what we need is Environmental Justice before we can plant gardens here in Little Village...and that is what brought me to the work that I am doing now.

Now I am here at Power Shift with Front-line Community Members and our Allies, working with the leadership of front-line communities and helping them create a trans-local movement to oppose corporate power is where there is strategic need for youth leadership.



# TEAM BREAKOUT SESSION

## STORY OF SELF

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### GOALS

- Practice telling your Story of Self and get constructive feedback
- Learn to draw out and coach the stories of others

### AGENDA

Total time: 60 min

1.	Gather in your team. Choose a <b>timekeeper</b> . Do <b>quick introductions</b> (name and hometown). <b>Articulate group agreements</b> for how you'll work together during this training.  <b>Have your coach tell their 2-minute story of self</b> as an example.	10 min
2.	Take some time as individuals to <b>silently develop your "Story of Self."</b> Use the worksheet that follows.  Remember: please review the "Coaching Tips" to prepare to coach others' stories	5 min
3.	<b>Share with a partner.</b> For each person: -2 minutes to tell your story -3 minutes to coach your partner <ul style="list-style-type: none"><li>* What values did the storyteller convey? How specifically?</li><li>* What is the <b>Challenge</b>, <b>Choice</b>, and <b>Outcome</b> in the story? Write them in the boxes on the worksheet that follows.</li><li>* Were there sections of the story that had especially good details or images (sights, sounds, smells, or emotions of the moment)? How did those details make you feel?</li><li>* What could the story teller do to more effectively convey why they are called to leadership in this campaign?</li></ul>	10 min
4.	As a team <b>go around the group</b> and tell your story one by one. For each person: -2 minutes to tell your story -3 minutes to get coaching from the group. Make sure everyone in your group has an opportunity to give feedback.  <b>*Make sure your timekeeper cuts you off.</b> This encourages focus and makes sure everyone has a chance to tell their story. Remember, the purpose here isn't to tell a perfect story, it's to practice narrative as part of the work of leadership.	30 min
5.	Return to the plenary space.	5 min



# WORKSHEET

## DEVELOPING YOUR STORY OF SELF

**Before you decide what part of your story to tell, think about these questions:**

- What will I be calling on others to do?
- What values move me to take action and might also inspire others to similar action?
- What stories can I tell from my own life about specific people or events that would show (rather than tell) how I learned or acted on those values?

**What are the experiences in your life that have shaped the values that call you to leadership in this campaign?**

FAMILY & CHILDHOOD	LIFE CHOICES	ORGANIZING EXPERIENCES
Parents/Family Growing Up Your Community Role Models School	School Career Partner/Family Hobbies/Interests/Talents Faith Overcoming Challenge	First Experience of organizing Connection to key books or people Role Models

Think about the challenge, choice and outcome in your story. The outcome might be what you learned, in addition to what happened. A story doesn't have to be dramatic to be effective!

Try drawing pictures here instead of words. Powerful stories leave your listeners with detailed images in their minds that shape their understanding of you and your calling.

CHALLENGE	CHOICE	OUTCOME

# COACHING TIPS:

## STORY OF SELF

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Remember to balance both positive and constructively critical coaching. The purpose of coaching is to listen to the way stories are told and think of ways that the storytelling could be improved.

**DON'T** simply offer vague “feel good” comments. (“That was a really great story!”)

**DO** coach each other on the following points:

- **THE CHALLENGE:** What were the specific challenges the storyteller faced? Did the storyteller paint a vivid picture of those challenges?

*“When you described \_\_\_\_\_, I got a clear picture of the challenge.”*

*“I understood the challenge to be \_\_\_\_\_. Is that what you intended?”*

- **THE CHOICE:** Was there a clear choice that was made in response to each challenge? How did the choice make you feel? (Hopeful? Angry?)

*“To me, the choice you made was \_\_\_\_\_, and it made me feel \_\_\_\_\_.”*

*“It would be helpful if you focused on the moment you made a choice.”*

- **THE OUTCOME:** What was the specific outcome that resulted from each choice? What does that outcome teach us?

*“I understood the outcome was \_\_\_\_\_, and it teaches me \_\_\_\_\_. But how does it relate to your work now?”*

- **THE VALUES:** Could you identify what this person’s values are and where they came from? How? How did the story make you feel?

*“Your story made me feel \_\_\_\_\_ because \_\_\_\_\_.”*

*“It’s clear from your story that you value \_\_\_\_\_; but it could be even clearer if you told a story about where that value comes from.”*

- **DETAILS:** Were there sections of the story that had especially good details or images (e.g. sights, sounds, smells, or emotions of the moment)?

*“The image of \_\_\_\_\_ really helped me identify with what you were feeling.”*

*“Try telling more details about \_\_\_\_\_ so we can imagine what you were experiencing.”*

Record Feedback/Comments from Your Team Members Here:

Coaching Your Team's "Story of Self" As you hear each other's stories, keeping track of the details of each person's story will help you to provide feedback and remember details about people on your team later. Use the grid below to track your team's stories in words or images.

NAME	VALUES	CHALLENGE	CHOICE	OUTCOME

## ADDITIONAL RESOURCES:

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### Videos:

- [Barack Obama, Keynote Address, “The Audacity of Hope”, Democratic National Convention, July 27, 2004, Boston, Massachusetts \(first 7 minutes\).](#)
- [NOI Video resource center: Story of Self](#)

### Readings:

- Jerome Bruner, “Two Modes of Thought”, Chapter 2 in Actual Minds, Possible Worlds (Cambridge: Harvard University Press, 1986), p.11 – 25.
- Martha Nussbaum, “Emotions and Judgments of Value”, Chapter 1 in Upheavals of Thought: The Intelligence of Emotions, (New York: Cambridge University Press, 2001), (pp. 19-33).
- George Marcus, The Sentimental Citizen: Emotion in Democratic Politics, (University Park: Penn State University Press, 2002), Chapter 4, “Becoming Reacquainted with Emotion” (pp.49-78)

# THE STORY OF US

## PUBLIC NARRATIVE: STORY OF US

*"What are the values of this community?"*

Goals for this session:

- \* To learn how to tell the story of this community in a way that reflects our values
- \* Each participant practices telling a story of us and gets feedback on her story
- \* To learn how to provide effective coaching to other's Story of Us

### Linking Story of Self to the Story of Us

A story of self tells people who you are and why you are called to do the work that you are doing. On its own, the story of self is insufficient to engage others in action. Ultimately the question is, what calling do you share with others, a calling that will require action?

### Our story of self is interwoven with stories we share with others.

One way a group of people establishes an "us" – a shared identity – is through telling of shared stories, stories through which they can articulate the values they have in common, as well as the particularities that make them an "us." These include stories of our family, community, faith tradition, school, profession, movements, organizations, nations and, perhaps world. It is through shared stories that we establish the identities and express the values of the communities in which we participate (family, faith, nation) and of emergent communities we are forming (new movements, new organizations, new constituencies). These stories of how people came together, the challenges they faced, the obstacles they overcame and the successes they had are the way we experience the values that make us who we are. They are the stories that we share around the campfire, when someone says, "remember that time when..."

### The character in the story of us is those of us in the room with you – in other words, your constituency.

Telling a "story of us" requires learning how to put into narrative form the specific experiences that the "us" in the room share with each other. It is a way to engage a community – this community – in acting together, based on values that we share. When we tell stories that reflect in images the challenges we have faced and what we've achieved together in detail, we



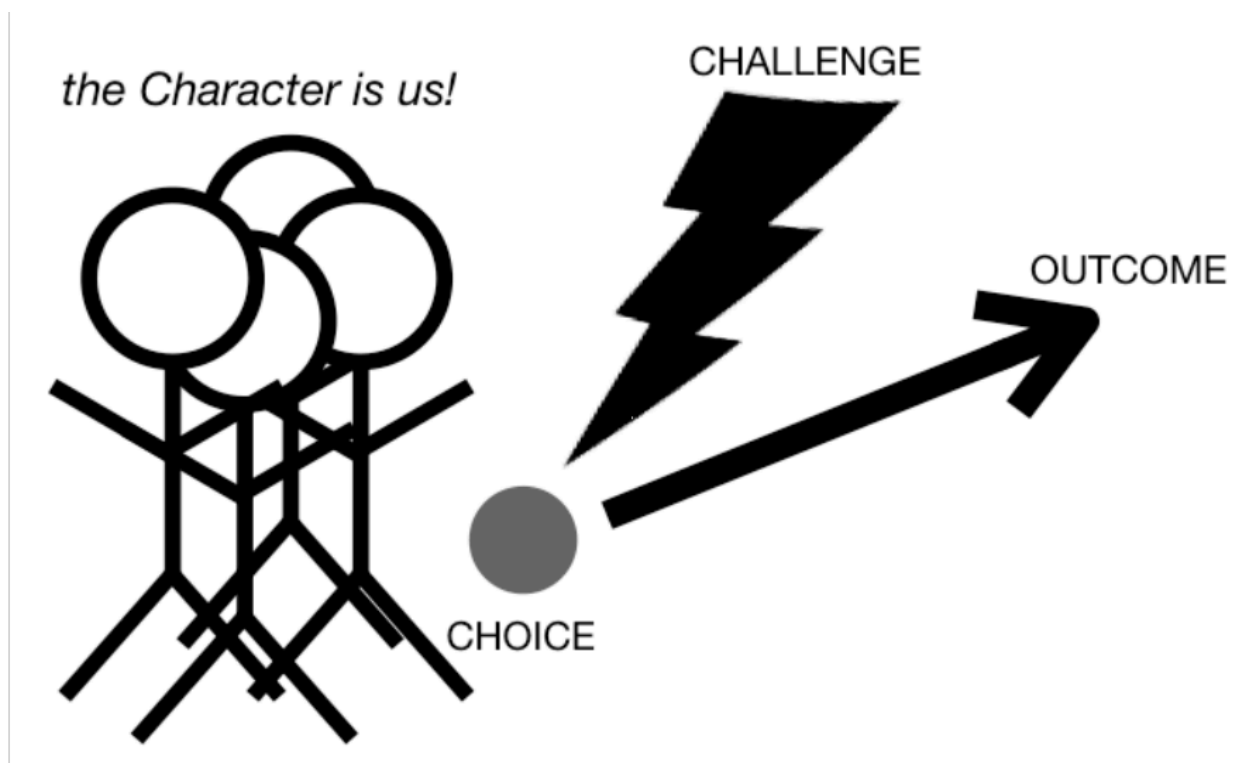
begin to build new community and new organization around values rather than just issues or interests alone. Telling a Story of Us requires learning how to put into narrative form the specific experiences that the “us” in the room share with each other.

**Stories help us shift power by building new community and new capacity.**

Often after we’ve heard others’ Stories of Self and we’ve started building relationships together, we discover that we face similar challenges that are rooted in very deep systems of power inequality. Learning to tell these Stories of Us is a way to join our stories together and acknowledge those shared challenges and the roots of the problem and sources of hope as a community. However a good Story of Us doesn’t just convey the root of our challenges, but also lifts up our heroes and stories of even small successes. Those stories give us hope that, if we come together and take action as a community, we can uproot some of the underlying causes of our suffering.

**Narrative Structure: Challenge, Choice, Outcome**

Remember the story structure we introduced in telling your Story of Self?



**Just like in your Story of Self, your Story of Us has a clear challenge, choice and outcome:**

The Urgent Challenge: The challenges our community has faced in the past, or faces now. What experiences has this community shared that articulate the challenges it has overcome? How were those challenges like the current one you will call on them to face (made real with stories, images, and details, not statistics)?

The Hopeful Outcome: Stories with vivid images and detail that remind this community of what we've already achieved together up to this point. What outcomes has this community experienced that articulate its sources of hope? What are its particular strengths?

The Strategic Choice: A specific, actionable, strategic choice that others in the room have made that reflects our values. (Like giving time to be here, or going outside our comfort zone, or working together on a teammate's leadership challenge.) What choices was this community called upon to make in the past in response to these challenges?

It is through the shared values in these stories that you will identify a unique reason for believing that this community has the capacity to join you in confronting an urgent challenge.



## TEAM BREAKOUT SESSION: STORY OF US PRACTICE

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### GOALS

- Develop a story with an identifiable “us” by using clear, specific examples of the challenges, choices, and outcomes of this community, the roots that provide strength.
- Practice telling this community’s story in a way that starts to join individual stories in a collective narrative.
- Coach others’ stories by listening carefully, offering feedback, asking questions.

<i>Agenda</i>		
<b>TOTAL TIME: 50 min.</b>		
1.	Review the goals and agenda. Pick a <b>timekeeper</b> .	5 min.
2.	<p><b><u>Take 5 minutes as a team</u> to brainstorm some of the shared experiences from today that make you an “us”.</b></p> <p>-What values do you all share?</p> <p>-Why were participants called to lead in their movements? Called to this training? How can you tell a story that connects all of your stories?</p> <p>-What were some of the challenges and sacrifices made to come to this training? What are some of the common challenges we have all endured?</p> <p>-What are folks hoping to learn and take back to their organization?</p> <p><b><u>Then take 10 minutes individually</u> to silently develop your “Story of Us.”</b> Use the worksheet below.</p> <p><b>TIP:</b> start with no more than 1 or 2 sentences of self to begin to get a sense of how the pieces fit together.</p>	15 min.
3.	<p><b>Each member of the group will tell your Story of Us one by one.</b> Each person has 2 minutes to tell his/her story and 3 minutes for coaching.</p> <p>NOTE: You have 2 minutes to tell your story. Stick to this limit. Make sure the timekeeper cuts you off. It encourages focus and ensures everyone has a chance.</p>	25 min.
4.	<p><b>Return to the plenary space for debrief.</b></p> <p><b>If you have time, Identify elements of stories that really brought the Us alive.</b> What did you learn about what worked? What kind of coaching helped improve your story telling?</p>	5 min.



## WORKSHEET:

### DEVELOPING YOUR STORY OF US

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The purpose of the story of us is to create a sense of community among individuals who may or may not yet see themselves as a community and to give them hope that they can make a difference. It builds on shared experiences and outcomes of previous actions to establish the context in which to take future action. Your goal here is to tell a story that evokes our shared values as your audience, and shows why we in particular are called to take responsibility for action now.

Your story of us may be a story of what we've already done together, challenges we've already faced and outcomes we've achieved. Or it may be a story of some of our shared heroes, challenges they faced and outcomes they've achieved. Hearing how we've met challenges in the past gives us hope that we can face new challenges together.

→Below: Paint a vivid picture of what **this** community is like –the 'us' that we are building in the room that you could be asking others to join right now. Remember to include specific anecdotes with vivid detail.

US	CHALLENGE	CHOICE	OUTCOME
What values do we and our people share?	What challenges do we share? What moments or experiences reflect those challenges?	Where have we seen people in our communities acting on those values? Where have we seen people acting with courage and dignity in the face of challenge?	Where do we see hope in our community?



## COACHING TIPS: STORY OF US

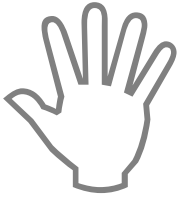
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Remember to balance both positive and constructively critical feedback.

**DON'T** simply offer vague “feel good” comments. (“That was a really great story!”)

**DO** coach each other on the following points:

- ☑ **INTERWEAVING SELF AND US (think back to the story of self the person shared earlier):** Did the story of self relate to the story of us? If so, what was the common thread?
- ☑ **THE US:** Who is the “us” in the story? Do you feel included in the “us”?  
*“Could you focus more on the experiences we as a small group shared today that reflect our values? For instance, \_\_\_\_\_.”*
- ☑ **THE CHALLENGE:** What were the specific challenges the storyteller’s community faced?  
How were those challenges made vivid?  
*“I understood the challenge to be \_\_\_\_\_. Is that what you intended?”*
- ☑ **THE CHOICE:** Was there a clear choice that was made in response to each challenge?  
How did the choice make you feel? (Hopeful? Angry?)  
*“To me, the choice you made was \_\_\_\_\_, and it made us feel \_\_\_\_\_.”*
- ☑ **THE OUTCOME:** What was the specific outcome that resulted from each choice? What does that outcome teach us?  
*“I understood the outcome to be \_\_\_\_\_, and it taught us \_\_\_\_\_.”*
- ☑ **THE VALUES:** Could you identify what this community’s values are and how this community has acted on those values in the past? How?  
*“Your story made see that we value \_\_\_\_\_ because \_\_\_\_\_.”*
- ☑ **DETAILS:** Were there sections of the story that had especially good details or images (e.g. sights, sounds, smells, or emotions of the moment)?  
*“The image of \_\_\_\_\_ really helped us feel what you were feeling.”*



## WORKSHEET: COACHING YOUR TEAMMATES' STORIES OF US

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Record Feedback/Comments from Your Team Members On Your Story Here:

### Coaching Your Team's "Story of Us"

As you hear each other's stories, keeping track of the details of each person's story will help you to provide feedback and remember details about people on your team later. Use the grid below to track your team's stories.

Name	Values? Clear Us?	Challenge	Choice	Outcome

## A STORY OF US (and NOW!): TIM HARLIN-MARKS, SIERRA STUDENT COALITION



*Tim was a Lead Trainer at Power Shift 2011 and told this story at the first training for trainers.*

I've spent the past two years working in environmental nonprofits and during that time that I've spent a fair share of early Saturday mornings in bland conference rooms full of flip chart paper and middle-aged, middle-class, white people wearing earth tones and talking quietly about their vacations.

And then I arrive in Washington, DC and I come to this room, and I look around and think this looks unlike any community of environmentalists I've ever been a part of. But I realize there's a reason for that – and the reason is that we're not environmentalists. We're not, let's face it, we're not, because we know environmentalists. We're people from disparate regions, and movements, and backgrounds – who give a damn.

We pay attention enough to know that the difficult realities of our time are placing people from all ways of life at risk. But while many of us went to elementary schools or places that celebrated Black History Month, put up bulletin boards in December with pictures of Menorahs next to Crosses, we still haven't been taught to work together. We still haven't been taught to see our struggles as common.

We come with different stories, different needs, many of us speak different languages, yet the prospect of climate disaster, climate and environmental disaster compels all of us to work together. We dream of a future without borders, without vast class differences, where we may all live full, long lives, in happy, healthy communities. And this may sound daunting, and it is, but I do not think it's impossible. Anybody who walked in here on Friday into a room scattered with you's and I's and stuck around long enough to be present in this room that's brimming with US knows that it's not only possible but it's absolutely necessary...

Necessary that we learn and buy into the skills of grassroots organizing and power building, and we go out into communities across the U.S. and we train others. We teach them how to build power in their communities, we invite them to join us in Washington DC and build a movement of more than 10,000 people. We'll take this back to our communities, we'll run grassroots campaigns, and we'll build a future that we want to live in, that we want our children, our grandchildren, and their children to live in.

Will you join me?

## ADDITIONAL RESOURCES

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### Videos:

- Christopher, Susan. 2007. Story of Us, Camp Obama, Burbank, CA, July 2007.  
<http://www.youtube.com/watch?v=Z-WEM-taoG8>
- NOI Video Resource Center: <http://noitoolbox.mirocommunity.org/category/story-of-us>

### Readings:

1. [George Marcus, The Sentimental Citizen: Emotion in Democratic Politics, \(University Park: Penn State University Press, 2002\), Chapter 4, "Becoming Reacquainted with Emotion" \(pp.49-78\)](#)
2. [Martha Nussbaum, "Emotions and Judgments of Value", Chapter 1 in Upheavals of Thought: The Intelligence of Emotions, \(New York: Cambridge University Press, 2001\), \(pp. 19-33\).](#)

# THE STORY OF NOW

## PUBLIC NARRATIVE: STORY OF NOW

*“What challenge and hope call us to action now?”*

### MOTIVATING PURPOSE

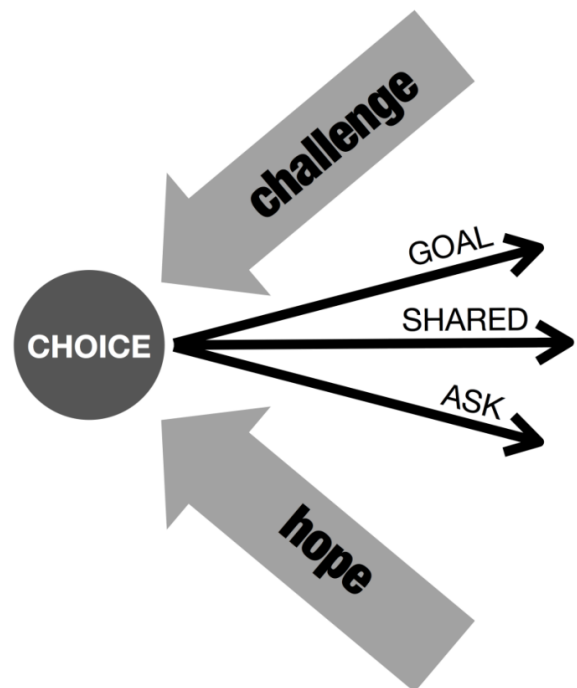
Now we know why you’ve been called to a particular mission, we know something of who it is you want to call upon to join you in that mission, and you’ve chosen a goal on which to focus, so what action does that mission require of you right here, right now, in this place?

A “story of now” is urgent, it requires dropping other things and paying attention, it is rooted in the values you celebrated in your story of self and us, and requires action.

### FIERCE URGENCY OF NOW

In Washington DC, August 23, 1963, Dr. Martin Luther King told a story of what he called the “fierce urgency of now.” Although we all recall his vision of what America could be, his dream, we often forget that action was urgent because of the “nightmare” of racial oppression, the result of white America’s failure to make good on its “promissory note” to African Americans. This debt, he argued, could no longer be postponed. If we did not act now, we could never realize the dream.

In a story of now, story and strategy overlap because a key element in hope *is* a strategy – a credible vision of *how to get from here to there*. The “choice” we offer must be more than “we must all choose to be better people” or “we must all choose to do any one of this list of 53 things” (which makes each of them trivial). A meaningful choice requires action we can take now, action we can take together, and an outcome we can achieve.



## THE CHALLENGE, CHOICE AND OUTCOME

Remember the story structure we introduced in telling your Story of Self and Story of Us? Just like those stories, a Story of Now has a clear challenge, choice and outcome. The story describes an urgent challenge facing your community, a hopeful vision of what life could be, and a specific choice others can make that will move us towards that vision...NOW.



**Challenge:** What urgent challenges does your community—your Us—face now (make the challenges real with specific stories, images, and details, not statistics or generalizations). Why haven't these challenges been resolved yet? Is there anyone who has a stake in keeping things the way they are?

**The Hopeful Outcome:** What is the hopeful vision of how things could be better that can inspire us to risk action? What makes that hope real and plausible and not just dream-like? Perhaps stories of people organizing to take action together elsewhere? Or hopeful outcomes you've already achieved together as a community in the past?

**The Choice:** What's the strategic choice you're asking others to make right now, this minute, to join you in action? Part of what makes a vision credible is a strategy to reach it. What's the path that you might take to realize your vision? "If each one of us does X, we can achieve Y, which will lead us to Z" This specific choice should be informed by the theory of change and tactics you developed in your strategy. What is the specific commitment you are asking each person to make, and why we must work together to achieve it? "Will you join me in \_\_\_\_\_?"

A Story of Now is urgent; it requires dropping other things and paying attention; it is rooted in the values you've discovered you share through relationship building. The choice we're called on to make is a choice to commit to strategic action now. Leaders who only describe problems, but fail to identify a way to act and bring others together to address the problem aren't very good leaders. If you are called to address a real challenge, a challenge so urgent you have motivated us to face it as well, then you also have a responsibility to invite us to join you in action that has some chance of success—not certain success, but plausible success. A Story of Now is not simply a call to make a choice to act – it is a call to *hopeful collective* action—action with a clear strategy behind it that helps us see how we can make a difference if we act together.



# TEAM BREAKOUT SESSION:

## STORY OF NOW PRACTICE

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### GOAL

- Develop a story of now with a clear and urgent challenge, a detailed vision for the future, and specific choice point for your audience to make.
- Learn how to focus on a choice to act with others to achieve strategic purpose.

*NOTE: It's more than an "ask." It's a choice about whether someone's going to stay on the sidelines or dive in. It's an opportunity for them to join with you.*

### AGENDA

TOTAL TIME: 50 min.		
1.	Review the agenda and goals. Pick a <b>timekeeper</b> .	5 min.
2.	Take some time as individuals to <b>silently develop your "Story of Now."</b> Use the worksheet that follows.	10 min.
3.	<b>Each member of the group will tell your Story of Now one by one.</b> Each person has 2 minutes to tell his/her story and 3 minutes for coaching.  NOTE: You have 2 minutes to tell your story. Stick to this limit. Make sure the timekeeper cuts you off. It encourages focus and ensures everyone has a chance.	30 min.
4.	<b>Return to the plenary space for debrief.</b>  If you have time, as a group, identify the elements of the individual Stories of Now that resonate with the group. Who's challenge was most vivid? Which path and choice most compelling? Which elements evoked hope?	5 min.



# WORKSHEET:

## DEVELOPING YOUR STORY OF NOW

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The story of now should be about your campaign, work or issue. Your challenge is to get this new community (the US) to care about your issue and commit to taking action with you today.

Why is it **urgent** to act now on your issue? What stories can you tell to make the **challenge** real for your listeners? Visualize specific detailed experiences that you've seen or heard that reveal the challenges you face together—specific moments, events, sights, smells, sounds. **Make the challenge concrete rather than abstract.**

What's the **outcome** you want to achieve? How could the future look different if you take action now? Why is this **outcome hopeful and plausible** (what about this moment makes action hopeful)? What specific people or events in your own community or beyond give you hope that this outcome can be achieved?

**What specific, strategic, actionable choice are you asking people to make now?** (it should be something that participants can actually do)



## COACHING TIPS: PUBLIC NARRATIVE

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**DON'T** simply offer vague “feel good” comments. (“That was a really great story!”)

**DO** coach each other on the following points:

- ☑ **THE CHALLENGE:** What is the specific challenge we face now? Did the storyteller paint a vivid and urgent picture of it? What details might make it even more vivid and urgent?

*“The challenge wasn’t urgent enough. Why not mention \_\_\_\_\_?”*

- ☑ **THE OUTCOME:** What is the specific outcome if we act together? Is there a clear and hopeful vision of how the future can be different if we act now?

*“The outcome could be even more hopeful if you described \_\_\_\_\_.”*

- ☑ **THE CHOICE:** Is there a clear choice that we are being asked to make in response to the challenge? How did the choice make you feel? (Hopeful?)

*“What exactly are you asking us to do? When should we do it? Where?”*

- ☑ **VALUES:** What values do you share with the storyteller? Does the story of now appeal to those values?

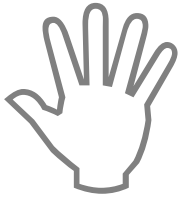
*“Instead of telling us to care, it would be more effective if you showed us the choice to be made by illustrating the way in which you value \_\_\_\_\_.”*

- ☑ **DETAILS:** Were there sections of the story that had especially vivid details or images (e.g. sights, sounds, smells, or emotions)?

*“The image of \_\_\_\_\_ really helped me feel what you were feeling.”*

*“Try telling more details about \_\_\_\_\_ so we can relate to this shared experience.”*

- ☑ **INTERWEAVING SELF, US AND NOW (for future linking of stories):** Did the story of self and the story of us relate to the story of now? If so, what was the common thread? If not, what thread could the storyteller use to rethink the connections between self, us and now?



## WORKSHEET: COACHING YOUR TEAMMATES' STORIES OF NOW

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Record Feedback/Comments from Your Team Members On Your Story Here:

### Coaching Your Team's "Story of Now"

As you hear each other's stories, keeping track of the details of each person's story will help you to provide feedback and remember details about people on your team later. Use the grid below to track your team's stories.

NAME	WHAT'S OUR CHALLENGE?	WHAT'S THE HOPEFUL OUTCOME?	WHAT'S MY STRATEGIC CHOICE?

## ADDITIONAL RESOURCES

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### Videos:

- Ben Kingsley as Mahatma Gandhi in the film *Gandhi*, non-violence speech.  
<http://www.youtube.com/watch?v=e3tjliWIkAQ>
- NOI Video Resource Center: <http://noitoolbox.mirocommunity.org/category/story-of-now>

### Readings:

3. [George Marcus, \*The Sentimental Citizen: Emotion in Democratic Politics\*, \(University Park: Penn State University Press, 2002\), Chapter 4, "Becoming Reacquainted with Emotion" \(pp.49-78\)](#)
4. [Martha Nussbaum, "Emotions and Judgments of Value", Chapter 1 in \*Upheavals of Thought: The Intelligence of Emotions\*, \(New York: Cambridge University Press, 2001\), \(pp. 19-33\).](#)



**LINKING THE STORY OF  
SELF, US & NOW**



## PUTTING IT ALL TOGETHER: LINKING SELF, US & NOW

*Tying together all of the pieces into a compelling public narrative*

*If I am not for myself, who will be for me?*

*When I am only for myself, what am I?*

*If not now, when?*

—Hillel, 1<sup>st</sup> century Jerusalem sage

As Rabbi Hillel's powerful words suggest, to stand for yourself is the first step, but insufficient on its own. You must also find or create a community to stand with, and that community must begin acting now. To combine the stories of self, us and now, you have to find the link between why you are called to this mission, why we as a community are called to this mission, and what our mission calls on us to do *now*.

That linking may require you to continually rethink the stories of self, us, and now that you are working on.



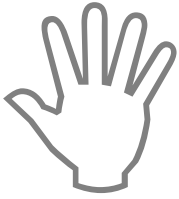
### **Storytelling is a dynamic, non-linear process.**

Each time you tell your story you will adapt it

— to make yourself clearer, to adjust to a different audience, to locate yourself in a different context. As you develop a story of us, you may find you want to alter your story of self, especially as you begin to see the relationship between the two more clearly. Similarly, as you develop a story of now, you may find it affects what went before. And, as you go back to reconsider what went before, you may find it alters your story of now.

### **Storytelling takes practice.**

Our goal is not to leave with a final “script” of your public narrative that you will use over and over again. The goal is to help you learn a process and framework by which you can generate your narrative over and over and over again, when, where, and how you need to in order to motivate yourself and others to specific, strategic action.



# TEAM BREAKOUT SESSION:

*Linking self, us & now*

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## GOAL

- Practice telling a public narrative in which self, us, and now are strategically and motivationally linked.
- Practice telling a public narrative to ask for a specific commitment from others to join in collective action.

## AGENDA

TOTAL TIME: 25 min		
1.	Review your notes and feedback from the 3 previous modules from the training.	5 min
2.	Take some time as individuals to silently develop your <b>“Public Narrative.”</b> Link your story of now with a story of self and story of us. Use the worksheet that follows.  Workshop with a partner if you want some extra practice.	20 min



## WORKSHEET:

*link self-us-now & ask for commitment*

SELF		US			
What experiences and values call you to take leadership?		What values and experiences do you share with the people you will be speaking to? ( <i>* remember this is the people sitting in the room with you now!</i> )		Why is it urgent to find ways to support one another now? What's your source of hope? What is the first choice each person must make to join you? Is it specific?	
CHALLENGE		CHALLENGE		CHALLENGE ( <i>urgency</i> )	
CHOICE		CHOICE		OUTCOME ( <i>nightmare/dream</i> )	
OUTCOME		OUTCOME		CHOICE ( <i>action now</i> )	<p><i>*HINT: It helps to start here and work backwards.</i></p>

# COACHING STORIES

## COACHING PUBLIC NARRATIVE

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### What is Coaching and Why Do We Need It?

Coaching is a way to support an individual or team in improving their effectiveness at any given task. In the context of public narrative, it means coaching for the effective articulation of values through story, linking a story of self, us and now; and increasing the likelihood these values can be translated into action.

<b>A good narrative coach is:</b>	<b>A good narrative coach is not:</b>
Someone who creates a respectful environment and supports sharing of key moments of our lives in a way that is deep and trusting	A therapist. Public narrative sessions can be therapeutic but it is not your job to be a counselor but guide and individual or group to the key learnings of strategic storytelling
Re-teaches concepts of public narrative concepts briefly as needed	One who gives general comments, judges content and is chit-chatty.
Helps individuals dive deep into the practice and 'fall off the bike'	One who tries to tell your story for you
Models listening, asking good & relevant questions, synthesizes and creates teaching moments	One who avoids critical feedback because they don't want to hurt your feelings
Willing to interrupt to ensure that learning happens in a group or individual setting. This means confronting uncomfortable situations where you feel rude but need to get the conversation back on track	

### **General tips on narrative:**

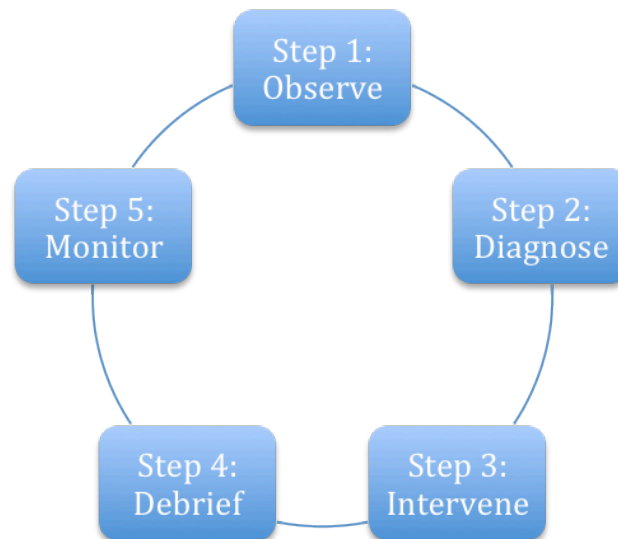
- When you hear the story- decide if you are coaching the storyteller or facilitating the group to coach? If you decide to coach start by saying "I am going to model coaching- and I am going to especially focus on x"
- This is not a communication skills exercise- it is not about public speaking skills. It's about "the glow from within, not the gloss from without."
- This is not a trauma/therapy session- the point is not to direct stories to private intimate details but to support public narrative for organizing
- Because the 'us' is different with every group a person shares a public narrative with, no one ever tells the same linked story of self-us-now twice. That's why this is not about polishing a script but rather about developing a leadership skill.

### **Three Coaching Challenges: Motivational, Educational, Strategic Challenges**

- *Motivational*: challenge of effort/heart. The practitioner is inhibited by fear, needs more courage to take risks, needs to work at developing competence more persistently, etc.
- *Informational*: challenge of knowledge and skills/hands. The practitioner doesn't know what makes a "good story", what is meant by "self, us, and now", the role of choice points, etc.
- *Strategic*: challenge of strategy/head. The practitioner has a hard time putting these tools to work in this particular context (as in the "story of us" for example), has a hard time choosing which stories to tell to achieve what kind of effect, etc.

### **5 Step Coaching Process**

Coaching involves a five stage process beginning with observation of what's going on, diagnosing the nature of the problem, intervening strategically, debriefing the coachee's understanding of the intervention, and monitoring subsequent performance.



## **1. Observe: What do I See and Hear?**

Begin by listening very carefully, observing body language, and asking very focused probing questions to satisfy yourself that you “get” the problem. It may take time to get the facts straight. But if you don’t get the problem, you can’t help solve it. Don’t be shy about asking specific “stubborn” questions. This process can help the coachee articulate just what the problem is in a way they may not have before. So it’s not only “getting information.”

Look for the key components of Narrative:




SELF	US	NOW
What are the experiences and values that call you to assume leadership in mission? Does the storyteller share an authentic experience? Do you ‘get’ them? Did you hear a challenge, choice and outcome?	What are the experiences and values of the “us” – or people in the room that will call them to join you in action on mission? Do you feel the US in the narrative? Did you hear a challenge, choice and outcome?	Why is it urgent to respond to the challenge? Where is the hope? What do you want to call on the people here to join you in doing? What is the outcome? Do you know why the storyteller cares about this? Did you hear a challenge, choice and outcome?

## **2. Diagnose: Which one of the three dimensions is the student struggling with?**

- Motivational (effort/heart)  
Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she’s embarrassed? Is he quitting too soon because of frustration or fear? Are they afraid of making themselves vulnerable? Is the relevant experience too painful? Do they not really care about the “now”? Do they have a hard time feeling their “us” is real?
- Informational (knowledge and skills/hands)  
Is the individual struggling because of not being able to understand the skills necessary for narrative? Is he getting interference from other habits and behaviors (e.g., someone well-versed in marketing speak may not know how to tell an authentic story)? Certain thing just need more practice? Are they clear about the challenge, choice, outcome structure? Do they understand the difference between a story of us, a story of self, and a story of now.
- Strategic (performance strategy/head)  
Is the individual struggling because of not thinking about or approaching the task appropriately? Does she understand the principles underlying that leadership practice (e.g. why a reason for hope is a key part of a story of self)? Is he forgetting or misinterpreting key elements of the task? Where might that misinterpretation come from, given your knowledge of the individual?

### 3. Intervene

Interventions are “correctional” or “developmental”. Correctional interventions involve showing, telling, teaching the person how to do it. . . . and are most useful with informational challenges. Developmental interventions usually take the form of questions. . . . and are most useful in encouraging the person to locate their sources of motivation or to figure out how to solve the problem.

			
If your diagnosis is that the <b>individual needs to put in more intense effort</b> , choose a <b>motivational</b> intervention, – for example:	If your diagnosis is that <b>the individual is not understanding the focal practice adequately, or thinking about it appropriately</b> , choose a <b>strategic</b> intervention – for example:	If your diagnosis is that the individual <b>lacks execution skill</b> , choose an <b>educational</b> intervention – for example:	
<ul style="list-style-type: none"> <li>• Encourage and exhortation—you can do it!</li> <li>• Offer a kick in the pants (with love)</li> <li>• Help the person understand and confront his or her fear, embarrassment, or other emotions that may get in the way of their ability to risk acting, persevering, trying new things. Communicate with empathy, hope, and affirmation of the coachee’s self-worth. Reward and praise courage</li> <li>• Model courage and emotional maturity in your own behavior, confess fear and explain how you move toward it rather than away from it.</li> </ul>	<ul style="list-style-type: none"> <li>• Model the behavior and invite the coachee to imitate you to get the “feel” of the activity</li> <li>• Focus on specifics. Focus on choice points, etc.</li> <li>• Break it down into small parts and invite the individual to try one at a time</li> <li>• Offer three or four different practice exercises and observe which ones “take” for that person.</li> <li>• Suggest others with whom the person can practice.</li> <li>• Suggest ways to figure out where to find the missing information.</li> </ul>	<ul style="list-style-type: none"> <li>• Work through a specific example with the person, asking questions to guide the strategic process. Then reflect on the process itself, asking them to describe how it worked?</li> <li>• Ask good questions about how the individual is thinking about the practice (“Why did you choose that tactic?”)</li> <li>• Offer your observations, asking how the person might think about it differently (“At that point, were there other options? What might they have been? Why did you choose the one you did?”)</li> <li>• Offer feedback on what you are hearing, asking if that describes the situation, at the same time, offering possible reframing of it.</li> <li>• Use silent reflection and self-diagnosis (“Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”).</li> </ul>	

#### **4. Debrief: Ensure information was communicated clearly.**

##### Helpful Debrief Questions

1. What are your main takeaways from this session?
2. What did you learn about your narrative today?
3. What will you do next to modify your narrative?
4. When can we check-in to see how this is progressing?

## How to Coach Story of Self?

The purpose of sharing our story of self is for us to connect on **values**. To understand **why people are called to leadership** and to organizing. By focusing on the challenge and the choice and the outcome we are communicating that we own our lives and we exercise choice. The story is not supposed to reflect our heroism or show that we are unique human beings but rather the opposite- that we are human like everyone else, vulnerable *and* despite the challenge we exercise choice. We have hope and we share our source of hope to inspire action. Finally, the story of Self is the story of a choice — everyone (when they think about it) has thousands of choices they could tell a story of, so the key is selecting one that (succinctly) reveals why they are called to leadership for this particular issue. It doesn't have to be dramatic but it does have to reveal the values they hold and want to put into action.

### Asking questions vs. giving direct feedback

Asking Questions to Elicit Feedback	Giving Direct Feedback
<ul style="list-style-type: none"><li>• What in that story resonated for you?</li><li>• What were the particularly vivid images or details that you remember?</li><li>• What were you still curious about? Was there a gap?</li><li>• Did you hear a challenge? What was the choice? What was the outcome?</li><li>• What kind of emotions did you feel when you heard the story – motivate to action or inhibit action?</li><li>• What would you have liked more of?</li><li>• What were the choice points?</li></ul>	<ul style="list-style-type: none"><li>• Ask the teller to identify the challenge, choice and outcome.</li><li>• Identify particularly strong choice points.</li><li>• Ask questions about the intended audience and the desired action or response.</li><li>• Ask questions to connect the dots.</li><li>• Identify themes and ask for confirmation.</li><li>• Identify particularly strong images or visuals that worked.</li><li>• Indicate where you saw evidence of the kinds of emotions that motivate people to take action or fall into inaction.</li></ul>

### Common Challenges in Story of Self:

1. No challenge, choice, outcome
2. "I don't have a story" (usually means 'a story I think is good enough')
3. Gives resume
4. Issue focused – like a speech on a topic (not personal)
5. Good story, but not public narrative
6. Someone becomes emotional
7. Vague feedback
8. Story sceptic (this does not fit this culture)

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## COACHING A GOOD STORY – WHAT TO DO IF YOUR STORYTELLER ...

**States that he/she doesn't HAVE a story** – everyone has a story! Work to find one by gently asking questions – what matters to this person, why? When did that happen? Why... get them into their story using questions. The challenge doesn't have to be tragic – just an important choice in their life.

**Avoids telling his/her OWN story** – ask for more direct experience of self, rather than a story of another person.

**Avoids telling a PERSONAL story** – shift focus back to personal away from “general problems” etc.

**Is lost in the abstract** – try to minimize abstract theory and focus on specifics of self, us and the now through stories of key moments and choices

**Unwinds a long biography** –reminder that the Now is the lens or focus point he/she should use to help identify good elements of Self and Us story. Try to pick one choice point only.

**Settles into rant mode** – the challenges are great and anger and emotions can spill over – ask for teller to limit description of the challenge and work to include hope. Trust one specific moment to paint a vivid picture!

### How to Coach Story of US?

The purpose of sharing our story of us is to create a community from the group in the room and from your small group. By focusing on the values that are in common among them and by focusing on the challenge and the choice and the outcome that joins them together, this community starts taking shape. This story draws on shared experiences (very often quoting stories of self shared earlier) to reveal shared values. As such, it is told in the past tense, like the story of Self. Importantly, it communicates also why we are hopeful and powerful together. It sets the ground for calling people to action in the story of now. Because it focuses on the common values it transcends issue silos. So instead of saying we connect on ending suffering vs. we connect on finding ways to cut costs – we facilitate a story of us that says we come together around the values of human dignity and stewardship of resources. The particulars of how we work on that and achieve it is for the story of now and the strategy.

### Common Questions:

- *Who is the us you want us to develop a story about?*

It is a challenge for the participants- they ask things like: do you mean us in this small group, us in the big group, us in at work, or should I imagine I am using narrative to recruit and the us is the targeted recruits?

- *Is this story about the past or the present?*

It is challenging for the participants to know whether it is a value based us (especially when the group just came together in this workshop) or if it is an experiential based us where they can go to the history of their relationships and draw on it. In the second case the challenge, choice and outcome of the story is often in the past. Of course they can say and now our challenge is...and our choice is....and this way they are preparing the ground for the story of now. If it is a value us then it can go either way. The story could be 1. Clear from our stories we faced the same challenge which is X in A's story and Y in

B's story and we had similar choices which are this or that and we chose and the outcome was X and why.

**Common Challenges:**

- (1) Restates story of self
- (2) Not us in the room
- (3) Can't find any specific shared experiences of us or shared values those experiences reveal
- (4) Bad dynamics: no us, but everyone says there is. "I relate to that because I also grew up in a city."
- (5) No challenge, choice, or outcome

**How to Coach Story of Now?**

Purpose of story of now:

- To create urgency and to articulate the specific action I'm calling others to take now.
- To contrast what would happen if I act AND if I don't act
- To instill hope that the action I am being asked to take will make a meaningful contribution to bringing about change.

**Common Challenges:**

- (1) The ask is vague or abstract: "let's all do what we can to improve the quality of services in the NHS"
- (2) The ask is not a collective action: "let's commit as individuals to doing what we can to improve quality for each patient"
- (3) The ask is a laundry list of possible actions: "here are 53 things you could do to improve services"
- (4) The ask is not achievable by group: "we need more Government funding for the NHS"
- (5) There is no hope in the story of now: "things are really bad so we need to act"
- (6) There is no vision of what the world would be like if we chose to act
- (7) The story of now is not connected to the story of self and us



# WORKSHEET:

## COACHING NARRATIVE

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Use the worksheet to record your observations, diagnosis and type of intervention you would like to use as your practice buddy goes through their role-play.

	Observations (Symptoms)	Diagnosis	Intervention
<b>Motivational (Heart)</b>			
<b>Strategic (Head)</b>			
<b>Skill Based (Hands)</b>			

**OFFLINE NARRATIVE  
APPLICATIONS:  
BUILDING RELATIONSHIPS  
THROUGH  
1:1'S & GROUP MEETINGS**

# BUILDING RELATIONSHIPS THROUGH 1:1'S & GROUP MEETINGS

*"To whom am I committed?"*

## OBJECTIVES:

*By the end of this training, you will...*

- Learn how to use your story to build relationships to develop leadership, community, and power.
- Practice building intentional relationships through the skill of one-to-one organizing conversations.
- Identify common values and interests, and unique skills and resources of others in this community.

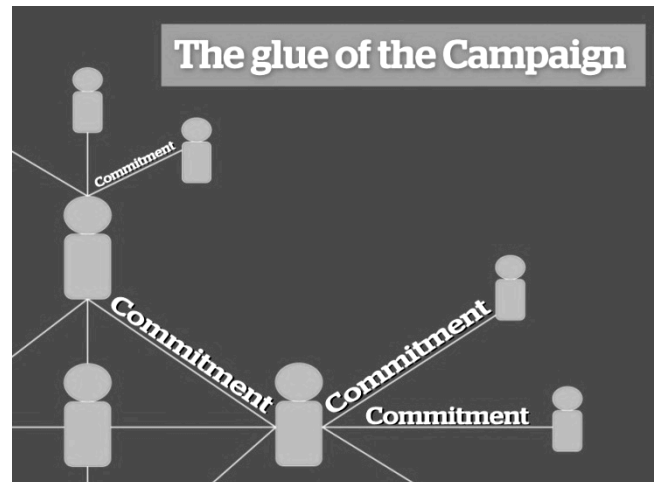
## RELATIONSHIPS BUILD COMMITMENT, THE GLUE OF AN ORGANIZATION

Leadership begins with understanding yourself: your values, your motivation, and your story. But leadership is about enabling *others* to achieve purpose in the face of uncertainty. The foundation of this kind of leadership is the relationships we build with others, most especially, others with whom we can share leadership.

### Identifying, Recruiting, and Developing

**Leadership:** We build relationships with potential collaborators to explore values, learn about resources, discern common purpose, and find others with whom leadership responsibility can be shared.

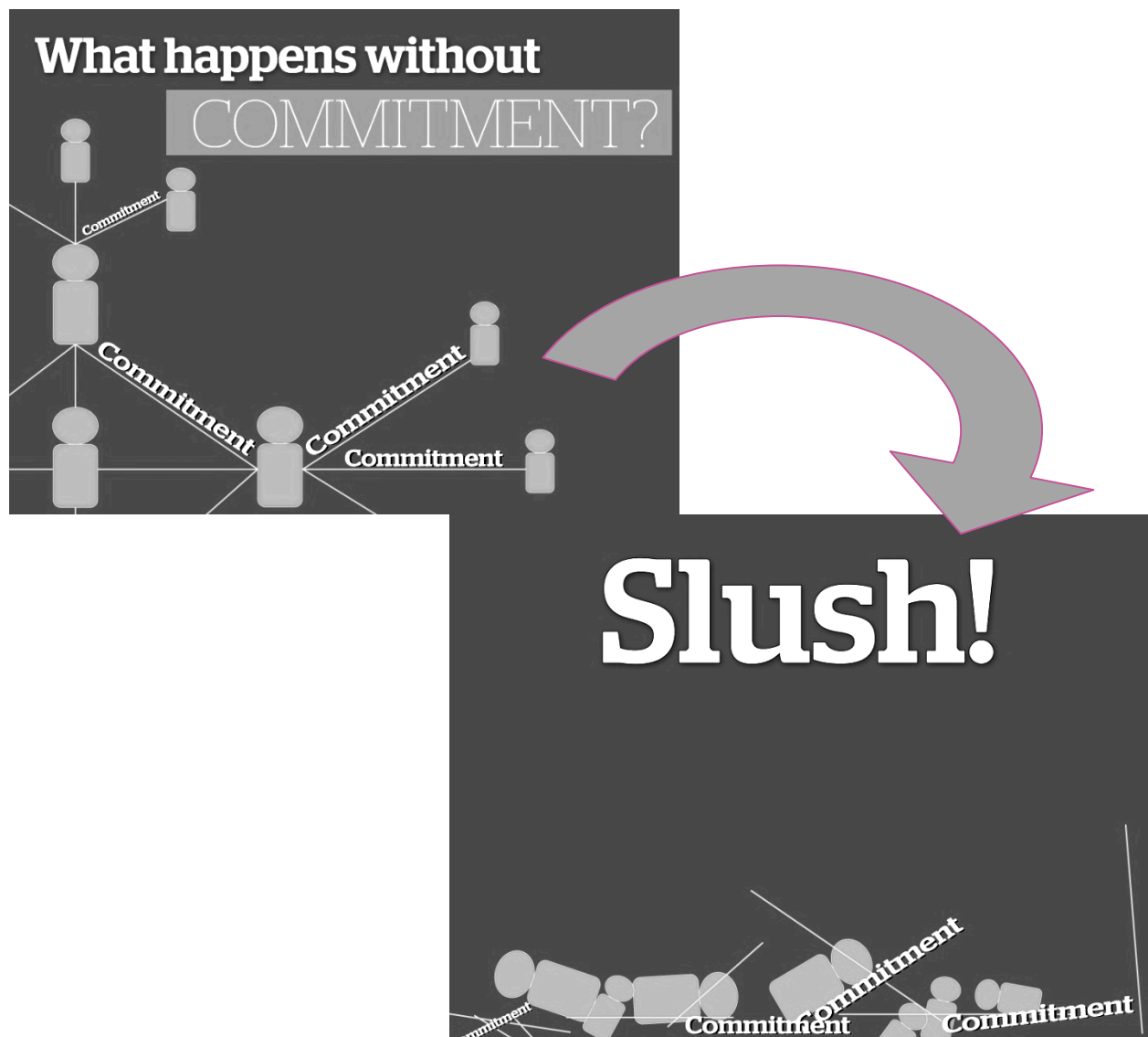
**Building Community:** Leaders, in turn, continually reach out to others, form relationships with them, expand the circle of support, grow more resources that they can organize, and recruit people who, in turn, can become leaders themselves.



**Turning Community Resources into Power:** Relationship building doesn't end when action starts. Commitment is one of your greatest resources in organizing, particularly when your campaign starts to come up against competition, internal conflict, or external obstacles. Commitment is developed and sustained through relationships, which must be constantly, intentionally nurtured. The more that volunteers or members find purpose in the intentional community you are building, the more they will commit resources that you may never have known they had.

## COERCION OR COMMITMENT?

As organizers and leaders we have an important choice to make about how we lead our organizations and campaigns. Will the glue that holds our campaign together be a command and control model fueled by coercion? Or will the glue be voluntary commitment? If we decide that our long-term power and potential for growth comes more from voluntary commitment, then we need to invest significant time and intentionality in building the relationships that generate that commitment—commitment to each other and to the goals that bring us together. That requires having transparent, open and mindful interaction, not closed, reactive or manipulating conversations.



## SO WHAT ARE RELATIONSHIPS?

### **Relationships are rooted in shared values**

We can identify values that we share by learning each other's stories, especially 'choice points' in our life journeys. The key is asking "why?" to understand the choices we've made separately and together.

### **Relationships grow out of exchanges**

Your resources can address my interests; my resources can address your interests. The key is identifying our interests and resources. This means that relationships are driven as much by difference as by commonality. Our common purpose may be as narrow as supporting each other in pursuit of our individual interests, providing they are not in conflict. Or we may discover a broader purpose on which to work together. Organizing relationships are not simply transactional. We're not simply looking for someone to meet our "ask" at the end of a one-to-one meeting or house meeting. We're looking for leaders to join with us in long-term relationships of learning, growth and action.

### **Relationships are created by commitment**

An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time. A commitment of time to the relationship gives it a future. And because we can all learn, grow, and change, the purposes that led us to form the relationship may change as well, offering possibilities for enriched exchange. In fact the relationship itself may become a valued resource – what Robert Putnam calls "social capital."



### **Relationships generate shared learning and growth**

Like any human relationship organizing relationships require constant attention and work. When nurtured over time, relationships become an important source of continual learning and development for the individuals and communities that make up your campaign or organization. They are also our primary source for sustaining motivation and inspiration.

Sometimes simply knowing that we are not fighting alone gives us the energy to continue the work. For example, the relationship between Cesar Chavez and his mentor, Fred Ross, Sr. was a long-term relationship built through one-to-ones and shared action. Their relationship helped spawn the United Farm Workers' movement and provided a source of learning and growth, not just for them as individuals, but also for the movement.

## HOW DO WE BUILD RELATIONSHIPS?

We build relationships for organizing the same way we build relationships in other parts of our lives, striving always to do so in an intentional and transparent way. Here are some of the relational tactics we can use to constantly grow our campaigns and organizations.

### One-to-Ones

One to one meetings are good for identifying leaders and recruiting them into leadership teams. Regular one to ones are also critical for building and sustaining strong relationships in which both partners grow and learn together over time.

### House Meetings

You can use house meetings to build community and commitment around the core leadership team. Once we have a team of leaders who are committed, that leadership has to reach out to engage their community deeply, and sometimes to create new community where it doesn't yet exist. In a house meeting campaign, leaders recruit and engage their own social networks in building a broader, deeper community of others willing to commit to create change together. House meetings were a key part of how Cesar Chavez built the Farm Workers movement, and it's how many candidates running for office for the first time build their base of support and leadership.

### Organizational Meetings

Organizational meetings help us launch a new idea or a plan, strategize around a problem, invite new members to the team or get team members recommitted to our cause and our campaign. Organizational meetings are like house meetings, but may take place at work, in our places of worship, at community centers, or anywhere where you can gather people of common cause together in one place.

### Team Meetings

Another way to build and sustain relationships is in team meetings. Often when groups of people who are working together have constant confusion, lack of communication and conflict, it's because they are not spending enough time connecting with each other as people, trying to understand each other's interests and finding ways to learn together. Team meetings are important for decision-making, strategizing and accountability, but also for maintaining strong committed relationships among leaders.



## BUILDING INTENTIONAL RELATIONSHIPS: THE ONE-TO-ONE MEETING



One of the best ways to initiate intentional relationships is by use of the one-to-one meeting, a technique developed and refined by organizers over many years.

### **Before the one-to-one:**

We have to get another person's attention to conduct a one on one meeting. Don't be coy. Be as up front as you can be about what your interest is in the meeting, but that first, you'd like take a few moments to get better acquainted.

There must be a purpose or a goal in setting up a one on one meeting. It could range from, "I'm starting a new network and thought you might be interested" to "I'm struggling with a problem and I think you could help" or "I know you have an interest in X so I'd like to discuss that with you." Be transparent about your purpose.

### **During the one-to-one:**

→ **CONNECTION**– Most of the one on one is devoted to exploration by sharing stories and asking probing questions to learn the other person's values, purposes, and resources. It is also important to share your own values, purposes, and resources so that it can be a two way street.

We exchange resources in the meeting such as information, support, and insight. This creates the foundation for future exchanges.

→ **CONTEXT**– Explain why the work you are asking them to engage in is important (build off your story of us & now). Be specific about the challenges we face, but also the opportunities and hopes. Instead of making statements, ask questions that help the person locate their own sense of anger and hope around the challenge.

→**CHOICE**– After exchange of ideas and information happens and both parties are clear about intentions there needs to be a choice. During a one to one you have to make a choice to move forward with the relationship or not, and commit to further exchange of knowledge and resources in the future or not. This should be a specific conversation during your one to one.

→**COMMITMENT**– If you choose to continue building a relationship, a successful one to one meeting ends with a clear commitment, most likely to meet again and to engage in action together. By scheduling a specific time for this meeting or action together, you make it a real commitment. The goal of the one to one is not just to get someone to make a pledge, to give money, to commit a vote. It's to build commitment to continuing the relationship in service of a shared purpose and desire for change.

→**CATAPULT**–Make a plan of action together. Explore your individual resources and how you can each bring those resources to bear in this relationship and on behalf of the campaign you're preparing together. You can ask for recommendations for other people to have one to ones with, or even ask this person if they will do one-to-ones with their own friends, family and neighbors etc.

One-to-One Dos and Don'ts	
DO	DON'T
Schedule a time to have this conversation (usually 30 - 60 minutes)	Be unclear about purpose and length of conversation
Ask questions and plan to listen	Try to persuade rather than listen
Follow the steps of the conversation above	Chit chat about private interests
Share experiences and deep motivations	Skip stories to "get to the point"
Share a vision that articulates a shared set of interests for change	Miss the opportunity to share ideas about how things can change
Be clear about the 'when and what' of your next step together	End the conversation without a clear plan for the next steps



# BREAKOUT SESSION

PRACTICE 1:1s

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## GOALS

- Practice using your Public Narrative in two 1-to-1s.
- Connect with two of your fellow participants and identify points of collaboration and diverse skills and resources.

## AGENDA

Total time: 50 min

1.	Find a partner. Review the worksheet individually and identify the purpose of you 1:1 and which stories would be most relevant.	5 min.
2.	Complete your first 1:1. Identify and write down on the worksheet what your “Share” “Listen” “Reflect” and “Act” elements. Write down your names and your action steps on a post-it.	12 min.
3.	Find your second partner. Review the worksheet individually and identify the purpose of your 1:1 and which stories would be most relevant.	5 min
4.	Complete your first 1:1. Identify and write down on the worksheet what your “Share” “Listen” “Reflect” and “Act” elements. Write down your names and your action steps on a post-it.	12 min
5.	Turn in your Action Item Post-its, fill in the “Follow-up” box on your worksheet, and then individually reflect through the following questions.	6 min

1) What new opportunities for collaboration did you identify? Did anything surprise you?

2) What was the most challenging?

3) Who are two people you want to invite to have a 1x1 in your own work after this training?



# WORKSHEET

## 1:1's PRACTICE REFLECTIONS

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We'll be watching a model one-to-one, and then you will have a chance to practice.

	Model 1:1	First 1:1	Second 1:1
<b>PREPARE:</b> Who are you meeting with? What are you hoping to accomplish?			
<b>SHARE:</b> What stories can you tell to connect? What values do you share?			
<b>LISTEN:</b> What values and interests do you hear from them? What stories are they telling?			
<b>REFLECT:</b> What points of connection or solidarity have you discovered? What skills and resources have you uncovered?			
<b>ACT:</b> What is your ask? What action steps are you taking?			
<b>FOLLOW-UP:</b> How do you plan to continue the conversation? Don't forget to say thank you!			



# WORKSHEET

## PRACTICE RELATIONSHIP BUILDING

### ONE-TO-ONE PRACTICE (30 min)

Choose a partner you don't know (or would like to know more about). Learn about why she has been called to do this work and what she is challenged by and excited about within the work. Probe with "why?" questions to get to choice points and specific experiences that shaped her life. Share your story. Listen to your partner's story for the motivations and the resources she could bring to this learning community (leadership skills, a following, action skills, etc.). Be specific. Below are some areas you might explore together, but this is not a scripted conversation. Be present. Close by making a **concrete commitment** to each other.

Avoid talking about issues like immigration, education, or the economy in an abstract and detached way. Talk about why YOU in particular care about a issue based on your own life experiences or the specific experiences of people you care about. What values were you taught that make you care about this? How were you taught those values?

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

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Challenges: What keeps you from action? What do you fear? What would you want to learn? What are our learning challenges?

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

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Leadership Qualities: What skills do you have? What do you want to improve in your leadership?

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What values do we share?

What interests can we act on together?

What skills, hopes and concerns do we each bring to this work?

**What specific commitments can we make to continue this relationship?**

## ADDITIONAL RESOURCES:

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As mentioned before, one-to-ones are just one example of relational tactics that give you an opportunity to use your story to engage others to act with you. In the following pages, you will find additional resources on Organizational Meetings, House meetings and Voter/Constituency Contact.

### The Organizational (or Organizing) Meeting

Although bringing new people into the political process is a core goal of a capacity-building program, members, or activists who have already shown support online or through other channels will be your easiest source of early house meeting hosts or volunteer leaders for future actions. They are also much more comfortable attending large group meetings and committing to action than others.



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When you're recruiting volunteers, you'll often find people who are interested in hearing more, but not quite ready to commit to volunteering. So how do you move them to the next step?

Organizational meetings are great ways for you to bring people into the fold without giving them the hard volunteer ask first. You want potential volunteers/supporters to feel connected with the campaign, and these meetings are a great way to do just that. Here are some important things to note:

- **Have attendees share their story of self** at the beginning of the meeting. This will show on a personal level why each volunteer is motivated to participate in your campaign. If your group is large, have them split into pairs or threes, then report back to the big group on one or two things they learned about each other.
- **Share the big picture.** Volunteers love to get insider information, so let them see a bigger picture of the work that they are doing and what we need to accomplish. (But don't go too far! Share only information that is appropriate to share.)
- **Make the need clear.** At the start of the meeting, set clear goals for what needs to be done in their community.
- **Next steps.** Remember, these meetings are a tool to recruit volunteers for your campaign. You want to have clear next steps and asks for all volunteers. Have an activity planned, so you can invite attendees to volunteer at a specific event, and get a real commitment.
- **Follow-up.** Call everyone who attended, and get them to commit to a volunteer activity.



Organizational meetings can help move someone who's on the fence into the active volunteers category, and help you build a network to win your campaign!

What are your best organizational meeting strategies? [Share in the comments on our blog!](#)

*Megan Simpson is an NOI community member, and formerly Field Director for the Montana Democratic Party*

*Photo from [Barack Obama](#), via [Creative Commons](#)*

# SAMPLE

## ORGANIZING MEETING AGENDA

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Relationship building is the constant non-stop work of organizing. One way of building relationships with new people and helping them build relationships with each other is to host organizing or recruitment meetings. These are distinct from your campaign strategy meetings in that the purpose is to recruit and bring together new supporters, motivate them through story work and relationship building, orient them to your strategy and invite them to join you in action.

The ask is the same for everyone: Get involved in the next volunteer team activity in your area, or if there is no team yet in your area, gather with others here now to schedule one meeting & an outreach action. (First commitment is to action.)

### 0:00 INTRODUCTION

Leader tells her story, welcomes and thanks people for attending and introduces the organizer.

### ORGANIZER'S STORY

Tell your brief 2-minute story. Attendees want to know who you are, where you came from, what choices you've made in your life that led you to this work.

### PARTICIPANTS' STORIES

Participants share their stories (if a small group). What are you experiencing now that brings you to care about this issue? If it's a large group they can pair up for 10-minute one- to-ones to share stories.

### DISCUSSION: WHAT DO OUR STORIES SHOW US WE HAVE IN COMMON?

### 0:25 CAMPAIGN STORY AND STRATEGY

Tell the story of this campaign and state and our role in national and local campaigns. Incorporate local heroes and stories about what people before us in this community have done, or in communities like ours.

Explain the strategy of our campaign—what the challenge is we face, what we're trying to win, and our specific goals, including the goals.

Give a clear picture of how many people we have reached, how many people are volunteering, and how we've found supporters in this area. Also clearly lay out the challenge ahead. Good visuals are key. Help people understand where they as individuals fit into your campaign's structure and strategy. Be transparent about goals so others feel motivated to help achieve them.

0:40 DESCRIBE AND ROLE PLAY THE TYPES OF ACTIVITIES TEAMS DO TO MEET GOALS  
Explain phone bank and canvassing, what it is, why it is important and how it helps to reach our goals. Ask people who have been volunteering with you to talk about their experience getting into action on this campaign. Prep them to role play a supporter contact conversation to show how easy and fun it is.

0.50 CALL TO ACTION

Invite others to join you NOW! Lay out the challenges we face, the possibilities if we win, and the path to winning, which includes taking action now.

Ask participants to make the choice to take responsibility for the change they want to see by joining an upcoming volunteer team activity if one exists, or scheduling one if one doesn't exist. Your team together can choose which activity you will do (phone bank, canvass, etc). Convey urgency—how many days left? (Avoid the temptation to give people a checklist of things to do—it can be overwhelming, and undermines the value of any one choice).

Invite participants to make the choice now. Have sign up sheets for each activity ready and available. If there are people from a place where there is no team give them time to schedule a meeting. Write all appointments and meetings on a large calendar that everyone can see.

0:00 CELEBRATE COMMITMENTS & CLOSING REFLECTION

## Voter and Constituency Contact

# candidateproject TIP OF THE WEEK

I hear a lot of questions from organizers and candidates who are fighting for progressive change in rural areas. The most common of those questions goes something like this: **"How do I create a message that resonates with rural voters?"**

Whether you're working in the bluest of blue cities, a deep purple suburb, or a flame-red ranching community, my answer is the same: create a message that's built on values, not policy. [Policy is important](#), but it has to come second. First, you have to convince people that you're LIKE them, and that you share their same values. Here are a few of the big picture hows and whys for that, with a focus on why it's powerful in rural or "conservative" areas.

- **Decide what values you want to convey.** Progressive policy goes hand in hand with small town values. Sticking together in tough times. Looking out for your neighbors. Hard work. Sacrifice for the greater good. Figure out which values you share with your community, and how they relate to your goals.
- **Build a narrative that conveys those values.** Use the art of Public Narrative to develop a [Story of Self](#), and a [Story of Us and Now](#), which you'll use to connect with voters in a powerful way.
- **Show how the values match the policy.** Finally, draw a line between values and policy. For example, most progressive policy is based on the idea that we all look out for one another. Rural communities often have strong bonds between neighbors, and communities take pride in coming together in tough times. Show how your proposals match that value.

Your ten point plan for fixing the local schools or investing in roads is important, but if you can't connect those policies to values, you won't connect at all.


Got a good trick for connecting progressive values in conservative communities? [Share in the comments on our blog!](#)

*Evan Sutton is Communications Director at NOI.*

# Beyond voting: Building change with meaningful engagement

POSTED ON TUE, FEB 01

Tags: canvassing, csea, jerry brown, noief, Organizing, prop 24, prop 25, voter contact, voter education, voting

 Tweet  Share

During the 2010 election cycle, NOI partnered with the California School Employees Association to make public education funding once again a top priority in California. A key part of the campaign strategy was engaging non-union households as a block of "education" voters. They did this by targeting low turnout voters to vote for Jerry Brown and two key budget related propositions (Props 24 and 25). The theory was, "If we can build a mass of voters that includes non-union households, not only can we elect public education friendly officials and pass ballot initiatives, but we can also begin to build the power to ensure that elected officials prioritize education."



As NOI's coach for CSEA, I knocked on doors. I'd done GOTV work before when I was a union organizer, but had never been involved in the voter contact phase. While out in the field, I was confronted with a challenge. Some voters were ready to jump on board at the drop of a name (Jerry Brown's to be exact), but many were skeptical about politicians making any difference. "Man, all those politicians are corrupt" was a common refrain. I learned an important lesson about organizing these voters: it requires the same skills as

Contributor:



JAKE WAXMAN

[More from Jake »](#)



Read the rest of Jake Waxman's blog at:

<http://neworganizing.com/2011/02/01/beyond-voting-building-change-with-meaningful-engagement/>



# **HOUSE MEETING CAMPAIGN TOOLKIT**

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## HOUSE MEETINGS

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### OBJECTIVES:

*By the end of this training, you should...*

- Identify the basic elements of an effective house meeting.
- Determine why house meetings are a useful tactic in an engagement organizing campaign.
- Learn how to structure and facilitate a house meeting.
- Practice the skills of organizing a house meeting (e.g. host recruitment calls, a one-to-one host preparation meeting, Host check-in call, facilitate a discussion at the house meeting).

## HOUSE MEETINGS – A RELATIONAL TACTIC THAT BUILDS POWER

House meetings persuade, organize, motivate and activate supporters. This tactic utilizes the power of social networks in energizing supporters and persuading those who might be interested to become more engaged. However, they must be run properly to be successful.

**You must be focused completely on motivating people through values and moving them to action—not debating issues or specific policies.**

## WHY A HOUSE MEETING CAMPAIGN?

The purpose of a house meeting campaign is to create a committed community and generate shared action.

**A house meeting is a chance to develop leadership and move others into action.** It is not a dinner party, a house party, or any sort of party at all. It is a working meeting.

One tactic for recruiting and developing volunteer leadership is house meetings. Building a house meeting requires that a host invite his or her social network to participate in a discussion about our community, the challenge we face, and our place in the solution.

**House meetings are a powerful way to build community.** They often engage infrequent voters and undecided voters, because participants get to know other people and have conversations about their own stories and values and our shared values as Americans. These informal meetings engage the social networks of hosts and bring in new people we might not find otherwise, and are a great way to energize supporters and provide a venue for generating shared commitment.

**House meetings lay out our overall campaign and challenge participants to take specific action now.** The organizer presents this information and asks for commitment to steps that will help the campaign build capacity to win.

**House meetings are also a good testing opportunity for volunteer leadership,** because anyone who succeeds at turning out 20 people to a single meeting is someone capable of organizing

other volunteers. House meetings challenge hosts to take a larger role in a campaign, and take part in recruitment of others to build the campaign.

As organizers it is your job to find volunteers willing to host House Meetings. Making these meetings successful takes a great deal of work and follow through.

## **THE ART OF ORGANIZING A HOUSE MEETING CAMPAIGN –**

### **House Meeting ORGANIZER GUIDE –** **Lessons from the Field**

1. Everyone active in the campaign/organization is expected to host a house meeting.
2. A successful house meeting should result in two new house meetings in the next two weeks.
3. Hosts should invite their entire social network (i.e. everyone they would invite to a wedding or a big party) to the meeting, except those who are opposed to our campaign
4. Each host should invite approximately 50 people. These invitations may be the most valuable contact the organization can have with its supporters.
5. You should create a house meeting tracking form and keep a record of:
  - Name of host
  - Names of invitees
  - Invitees attendance, and
  - Support status of all attendees.
6. You should include regular check-in calls (to confirm invitation, attendance, and reminders) into their schedule. Remember, recruit-confirm-confirm-confirm!
7. All attendees must sign in so that you have their contact information.
8. The first ask should be a public request for house meetings in the next two weeks. The second ask should be a public request for some form of action in the next two weeks.
9. Organizers should be able to identify those who are supporters by the end of the meeting and enter their support status into the data system.

## TEAM BREAKOUT SESSION:

### HOUSE MEETING PRACTICE

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#### GOALS

- Brainstorm and debrief effective and ineffective facilitation as a group
- Use those techniques to role play a house meeting
- Debrief on your role play and share key lessons

#### Agenda

TOTAL TIME: 60 minutes

1. Gather in your team. Review agenda. Nominate timekeeper. 5 min.
  - Nominate a “Host.” Nominate an “Organizer”
2. **Role play** house meeting 45 min
  - As a team, read through the agenda for the role play **(5 min)**
  - Host reviews agenda, tells 2 minute Story of Self, and introduces Organizer **(5 min)**
  - Organizer proposes 3 Norms, asks group if they agree and whether they’d like to add something, tells Story of Self, Us and Now, asks participants to “pair and share” **(6 min)**
  - Participants exchange Stories of Self **(5 min)**
  - Organizer facilitates group discussion **(10 min)**
  - Organizer shares campaign strategy **(6 min)**
  - Host testimonial and Organizer makes ACTION ASK **(5 min)**
  - Host thanks group **(3 min)**
3. Debrief the Role Play 10 min
  - What was effective? What can be improved? Where did we get off track?
  - What questions do you have?

Write down key lessons learned.

# WORKSHEET:

## House Meeting Facilitation

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**The main difference between a productive house meeting and a disaster is effective facilitation.** A well-prepared, well-trained facilitator can leverage a meeting for maximum commitment, whereas a poorly prepared or untrained facilitator will likely be unsuccessful and may actually turn potential supporters away.

Use the space below after your house meeting role-play to identify and record effective and ineffective elements of facilitation.

What are elements of effective facilitation? What tools might aid a facilitator? What have you seen so far that helped create structure and can be used at a house meeting?

What types of facilitation are counterproductive? What might cause a facilitator to miss important points? Have you seen any examples of unproductive or disorganized facilitation?

What are the key takeaways from the role play? What tricks did the facilitator use effectively? Where do you see yourself struggling as a facilitator?

What questions do you have about house meetings?

# House Meeting Host Guide

## **Preparing for the meeting**

### ☐ Recruit Online:

Advertise your event through e-mail, over twitter, on Facebook and/or any other social networking sites that you are a member of.

### ☐ Invite your friends and neighbors:

Use the “House Meeting Planner” to brainstorm fifty people you can invite to your event. Think about friends, family, coworkers, neighbors and acquaintances who might be interested in learning more about the program. Aim to invite at least 50 people to ensure you have 10-15 people in attendance.

### ☐ Get your materials in order:

There are some things you should have ready before your house meeting. The “House Meeting Planner,” sign-in sheets and flyers printed, any videos you might want to show, the agenda charted, and voter registration forms available. You may want to provide snacks and beverages for your guests.

### ☐ Practice your story.

Use the “Public Narrative Practice Worksheet” to help you get ready to share your story at your house meeting. Do not worry about preparing a formal speech, but instead speak use the practice worksheet to help you with structure, and then speak from the heart at the meeting.

## **During the Meeting**

### ☐ Follow the House Meeting Agenda (copied below)

- Be prepared to give a short explanation of why you became involved/what inspired you
- Introduce the Organizer

## **After the Meeting**

### ☐ Capture Information:

Enter your sign-in sheets in the campaign database.

### ☐ Thank your guests:

Send individual thank you emails to all of your guests. Follow up with those who committed to participate in the next action. For those who didn't sign up to volunteer, thank them for coming and make sure to let them know about your next event.

## House Meeting Planner

Our goal for a successful house meeting on \_\_\_\_\_ is to have 20 people attend your meeting. To actually have 20 people there, however, will mean inviting at least 50 of your friends, family and acquaintances. Use this brainstorm sheet to think of those you want to invite \_\_\_\_\_, including who are likely to \_\_\_\_\_.

Name	Phone #	Invited (Y/N)	Committed (Y/N)	Confirmed (Y/N)	Notes
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**Name:** Please print the invitee's full name.

**Invite:** Please mark **yes, no, maybe** or **left message (LM)**. This will help you track who you need to contact and who you should be calling for confirmation. The only real invitations are when you speak with someone directly.

**Commit:** Please mark **yes, no** or **maybe**.

**Confirm:** Please mark **yes, no** or **left message (LM)**. You'll need to call every invitee who said yes or maybe, and every invitee who only got a left message. Please do not assume that **anybody** will come without a confirmation the day before your meeting. It can't hurt to give people a quick reminder, and we need to know how many people will be at a meeting to make that meeting as effective and enjoyable as possible.

**Notes:** If the invitee cannot come to your house meeting, please write why.

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## Recruiting for your House Meeting

### *Sample Call Scripts for Host*

#### Call No. 1

The purpose of this call is to invite friends/family to your event. This script is not meant to be followed verbatim – feel free to take liberties with it, this is merely a conversation between you and your friends.

Make sure that you have the “House Meeting Planner” handy so you can jot notes down during each call.

Hi \_\_\_\_\_, it's \_\_\_\_\_, how are you?

I'm calling you because I've committed to hosting a House Meeting for the \_\_\_\_\_ campaign. The \_\_\_\_\_ campaign is committed to \_\_\_\_\_ in our community. Are you interested in participating in the \_\_\_\_\_ campaign?

- If yes, write “yes” in the “Support” column
- If no, write “no” in the “Support” column

#### **If Yes**

Great! I'd love to tell you more about the project and the types of events we'll be hosting to meet our campaign goals. I'm hosting a house meeting to bring our neighbors together and plan how we'll make sure the voices in our community are heard.

Next week, I'll be hosting a house meeting at me home. It's going to be on \_\_\_\_\_  
(day/date) at (time), at (location). Can I count on you to be there?

- Mark “Y” that you invited them in the “Invited” column
- Mark “Y” or “N” in the “Committed” column

Well, thanks again for your time – Please let me know if you have any questions and I'm looking forward to seeing you next week.

## Call No. 2

*The second call should be made no later than the day before the house meeting.*

Hi, is \_\_\_\_\_ there?

Hi \_\_\_\_\_, it's \_\_\_\_\_. How are you?

Great. I'm calling to remind you about the \_\_\_\_\_ campaign event I'm hosting tomorrow. You're still coming, right?

*(Please record answer in "House Meeting Planner" spreadsheet, under "Confirmed" column)*

### **If Yes:**

Ok, great – thanks a lot for your time, I look forward to seeing you tomorrow!

### **If No:**

That's too bad. There's nothing I can do to convince you to come? It won't last long, and I'm committed to making a difference for this project. We can make a bigger difference if we do this together.

*(If still no...)* Well, I understand, it's okay. Thanks for your support .

## House Meeting Agenda

**0:00 Welcome & Introductions (host leads, 5 min)**

**0:05 Host's Story (5 min)**

- Why did you take leadership in this campaign? Where do you come from, what one or two experiences in your life led you to decide to take responsibility?
- Why are you hosting this meeting?
- Introduction of the Organizer

**0:10 Organizer's Story of Self, Campaign Story of Us and Now (5 min)**

- Organizer shares personal Story of Self (2 min)
- Organizer shares the campaign Story of Us and Now (3 min)

**0:15 Pair and Share (organizer and host facilitate, 10 min)**

- Have participants break into pairs or groups of 3 and share their stories and reasons for coming to the meeting

**0:25 Group Discussion (host and organizer facilitate, 20 min)**

Why are you involved in civic action? How have you been active in your community or our democracy? What inspired you to act and take responsibility on this campaign now?

**0:45 Call to Action (host or organizer, 5 min)**

- Sign up for a volunteer training
- Sign up for our next action
- Host a house meeting

**0:50 Evaluation and Debrief (host or organizer, 5 min)**

**0:55 Thank you and Next Steps reminder (host, 5 min)**

**1:00 End meeting**

## ADDITIONAL RESOURCES

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### Videos:

- Obama Campaign, South Carolina House Meeting Video. July, 2007. <http://www.youtube.com/watch?v=iF5jqtM-Ekl>
- [NOI Video Resource Center: Building Relationships](#)

### Readings:

- Malcolm Gladwell, "Six Degrees of Lois Weisberg," in The New Yorker, January 11, 1999 (pp.52-63).
- Ian Simmons, "On One-to-Ones," in The Next Steps of Organizing: Putting Theory into Action, Sociology 91r Seminar, 1998, (pp.12-15).
- Hanna Rosin, "People-Powered: In New Hampshire, Howard Dean's Campaign Has Energized Voters," Washington Post, Tuesday, December 9, 2003, p.C01.



**OFFLINE NARRATIVE  
APPLICATIONS:  
EMAIL, BLOGS & SOCIAL MEDIA**



## ONLINE APPLICATIONS: EMAILS, BLOGS & SOCIAL MEDIA

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*“How do you tell your story online?”*

### OBJECTIVES:

- Learn how to apply your narrative skills in your online program
- Practice the basics of writing an effective story-based email to engage your constituents to action online.
- Practice drafting story-based content for your social media outlets.

### WHAT IS ONLINE ORGANIZING?

Online organizing allows you to scale your actions, connect with people that you couldn't visit in person, engage new audiences, and empower supporters to take action in their own community. In an age when we are all publishers and content creators, it's easier than ever to engage others in online organizing.

New Media should be integrated into every corner of your organization because it complements and improves your overall communication, recruitment, field work and fundraising efforts. Online organizing only goes so far though, so it should be closely tied to all of the work you are doing offline. (Remember, nothing magically goes “viral.”)

People respond to online calls to action because you're tapping into something they're already interested in. The best way to connect with them is visually – by using pictures and video. Your online program is essentially constantly telling your story of Us and Now, creating feelings of urgency and feelings of hope by explaining the meaningful change supporters can create by getting involved and taking action.

The core components of your online program:

- Email campaigns
- Website
- Blogs
- Social Media (Twitter, Facebook, etc.)
- Video



## EMAIL: THE HEART OF YOUR ONLINE PROGRAM

While there are many tips and tricks for online work, the core of a strong online program is still a strong email campaign. Social media and ads can augment your email campaign, but your core focus should always be building an email list and leading strong email campaigns that move supporters to action. Here are a few things to keep in mind when you're drafting your emails.



- **Find your moment:** Your email should be timely and relevant to events in your campaign and in the news in order for people to feel a sense of urgency to take action.
- **Theory of Change:** In every communication you make, spoken or written, you must always tell people how taking this action will help them create the change you want to see.
- **The Ask:** This is important – you can only have ONE ask per email. Readers can be easily overwhelmed in an email if you ask for too much. Remember, you can create an entire narrative arc and message calendar to ask for other things later.
- **Story and Tone:** Just like when you're telling your Story of Self, Us & Now, you should use a personal voice that draws people into the emotions, values and action you're asking them to take. Convey in detail the challenge, the choice, and the potential outcome.
- **Dynamic Content:** While you don't want to overwhelm your email with too many graphics, having a simple image from an event, a graphic about an upcoming action, or a still frame from a video can draw in people's attention. Just make sure the same image or video appears on the landing page on your website.
- **"From" lines:** Readers often become very familiar and connected with these "characters" from your organization, and they will be ones who communicate with your supporters on a regular basis. So pick 1-2 people who will be the "voice" of your organization in the "From" line.
- **Subject Lines:** You have less than 2 seconds to catch someone's attention so they'll open your email. Make sure your subject line should be short, engaging, action-oriented, relevant, and specific.
- **Be Bold:** Literally. Make sure to **put one or two key lines in bold** text in your email. It will help draw the reader's eye through your message.
- **Be Courageous:** The best emails are direct and drive home a strong call to action. Avoid being wishy-washy or wonky.

## SAMPLE EMAILS

**Courage Campaign, Phone call recruitment email:** Tells a clear story about the urgency and need for the more phone bank volunteers, clear call to action repeated 3x's (once in the image, two in text), and very clear story about how it's easy and fun!

**You have a choice** [Inbox](#) [X](#) [lists](#) [X](#)

[Print all](#) [Create a document](#)

★ **Caitlin Maloney, Courage Campaign** to me [show details](#) 8:32 AM (33 minutes ago) [Reply](#)

**COURAGE** ★   
**CAMPAIGN**

Dear Lola --

Time is running out -- we have just over one week left to save California from corporate greed.

**But without your help, we won't be able to defeat Prop 16 (PG&E's power grab) and Prop 17 (Mercury Insurance's rate hikes). Or pass Prop 15 to create clean elections that decrease corporate influence.**

Fueled by your support, Courage Campaign California field teams are calling as many Courage members as possible about this important election. But with the election so close, **we need to dramatically increase the number of calls we make** -- or else the corporations and their tens of millions of dollars will win.

**That's where you come in.** To turn out the progressive vote on June 8, we need your help to connect Courage Campaign California members to each other. It's called **CALL FOR CALIFORNIA** and we need you to sign up for a phone-from-home training today.

**It's easy to participate and you have a choice -- you can either sign up for a short CALL FOR CALIFORNIA training or you can make a financial contribution to support this program so others can participate. Just click on one of the two options below:**

[\*\*YES! Please sign me up now for a CALL FOR CALIFORNIA training, so I can help Courage members get to the polls on June 8.\*\*](#)

[\*\*NO, I can't attend a training but I want to do my part. I will contribute \\$25 or more to support Courage's work to get out the vote.\*\*](#)

Vote-By-Mail ballots are being cast right now across California. If we can talk to Courage members about these propositions ASAP, it will make the difference between victory and defeat on Election Day.

You'll be calling people just like you -- Courage supporters who are eager to talk about the propositions on the June ballot. Because we're turning out the vote by educating and inspiring our fellow members, you'll almost always be talking with a voter in California who supports progressive values.

If you've never made phone calls to voters, it's easy. We will personally train you over the phone before your shift, give you a script and all of the resources you need to make calls from home, or even with a team of friends.

**The June 8 election will come down to a handful of voters. We have no time to lose -- an extra nudge from a fellow Courage member like you is what will motivate another Courage member to vote. Just choose one of the two options below to get involved:**

[\*\*YES! Please sign me up now for a CALL FOR CALIFORNIA training, so I can help Courage members get to the polls on June 8.\*\*](#)

[\*\*NO, I can't attend a training but I want to do my part. I will contribute \\$25 or more to support Courage's work to get out the vote.\*\*](#)

Thank you for everything you are doing to make California more progressive.

Caitlin Maloney  
Data Director, Courage Campaign

**CALL FOR CALIFORNIA**

SIGN UP NOW TO  
PHONE FROM HOME  
BEFORE JUNE 8

**TURN OUT THE  
PROGRESSIVE VOTE  
IN CALIFORNIA**



**GetEQUAL.org, Offline Recruitment Email:** Personal tone, clear call to action, graphic that helps tell Robin's story,

**This is why I fight.** [lists](#) [X](#)

[Print all](#) [Create a document](#)

★ **Robin McGehee, GetEQUAL** to me [show details](#) May 9 [Reply](#)

# GETEQUAL.

Happy Mother's Day, friends!

You might think wishing you a happy Mother's Day is an odd way to start an activist email but, for me, it's entirely appropriate. I first got involved with political action because of my primary identity as a mom. I could no longer tolerate raising children in a world in which my kids were being taught that I was "less than" other kids' moms.

I got involved with GetEQUAL as a mother first -- understanding that it is only through smart legislative strategy and strategic direct action that we will achieve full legal and social equality for LGBTQ Americans. I engage in actions like the rally to support the repeal of "Don't Ask, Don't Tell" last Sunday because I owe it to my kids:

<http://getequal.org/dadtrally.php>

You and I might share that motivation -- or you might have gotten involved with GetEQUAL for entirely different reasons. Whatever brought you to our community, I'm asking that you rally together with me and thousands of others across the country over the next few months to take concentrated, strategic direct action for equality. We have a very small window of opportunity left to push through the repeal of "Don't Ask, Don't Tell" and a fully-inclusive Employment Non-Discrimination Act and there is no time more urgent than now to take action.

I hope that you will join us in those actions, and that you'll invite your friends to do the same:


<http://getequal.org/join-the-movement.php>


I remain optimistic that the LGBTQ community has more imagination and greater resourcefulness than those who seek to keep us separate and unequal -- and we're hoping that you'll help us amass that collective imagination for some important fights coming up.

As I take a day off today to celebrate Mother's Day with my kids, I'm also gearing up for fights on DADT and a fully-inclusive ENDA. I don't want to have to organize people against a President I campaigned laboriously for, but I will. I don't want to have to spend more time away from my family in the coming months and years, but I will. I don't want to handcuff myself to the gates of the White House or storm into another Congressional committee hearing -- but you'd better believe that I will.

Happy Mother's Day. Now let's go raise a ruckus!

*Robin and the GetEQUAL crew*





My son drew this picture on our way to "Orock Obama's house" last fall for the National Equality March.

[Click here to unsubscribe.](#)

## DRAFTING A BLOG POST

As a first step after sending an email blast, you may want to write a blog post that is relevant to the content of your email. A blog post allows you to:

- Reiterate the content from the email on a webpage that can be easily linked to from websites, blogs, social media sites and other platforms
- Expand upon the content of the email with more information
- Insert an opinionated voice into the debate
- Link to other blogger's posts and engage a conversation across the blogosphere
- Offer a forum for public conversation (via comments) around your email content
- Enrich the email content with engaging media like photos and video

By creating your own blog posts you can become actively involved in the debates happening in blog communities as well enhance your organization's reputation as an expert and authoritative voice on your issue. Blogs are also effective tools for engaging your supporters in your work and narrating the story of your organization and campaign on an ongoing basis. A frequently updated blog will help to drive traffic to your site, and strengthen a community around your campaign content.

Good blog posts are written in a conversational tone with a strong voice. They offer an opinion, and can sometimes be controversial. They are the opposite of dry and boring. Here are some tips to consider when crafting your post:

- Title: a clever, concise, and compelling title goes a long way. Just as you spend time considering an effective email subject line, consider what makes sense for a blog post title. Sometimes it can be the same as the email subject, but other times it makes more sense to create something unique for the web. Use your judgment.
- Links: the ethos of the interconnected web encourages networked conversations. Blog posts are not web stories. They are your contribution to a wider conversation, one that's happening across many sites. You should participate in that conversation by referencing, rebutting, reinforcing or otherwise acknowledging other voices on the issue via hyperlinks within your post. You are also welcome (and encouraged!) to link to previous posts that you or other contributors have authored.
- Images: blocks of text are boring. Did we mention blog posts shouldn't be boring? Make your post visually interesting by inserting a graphic or photo. If you don't have an image for your post, do a quick image search on <http://images.google.com> or on Flickr. You may need to get permission if the image you select isn't Creative Commons licensed. Be sure to give credit where credit is due.

- Video: supersize your post with some serious storytelling. The greatest amount of time spent online is spent watching video content. If there's a relevant video online – a news clip or something else on YouTube, embed it in your post. Or consider taking a few minutes to produce original content for your post. A little Flip cam costs less than \$200 and has a USB stick that you can plug straight into your computer. Interview your colleagues, your friends, yourself and add a short clip to your post.
- Length: don't feel like you need to write an academic essay. Posts can be brief (200 words), or they could be longer if you have more to say. Mix it up. If you're more likely to write a blog post if it's shorter then do it. Something brief is better than nothing at all.
- Second pair of eyes: as with any writing, run it past a second pair of eyes before you hit publish.
- Comments: once you've published your post and promoted it through various channels, check back in on it to see if people have commented. A conversation between the blog author and the readers plays out on the page, between the posts and the comments. Commenting on others' comments will grow the conversation and add more value to your posts

## **Reach out to Bloggers**

With the decline of the print news more and more people are turning to blogs to get their news and analysis. Blogs have become powerful tools for getting ideas out into society and turning a large number of eyes toward an issue. Blogs have become a core place where civic issues are debated and policy consensus is formed as well as a powerful tool for getting stories into the mainstream media.

While not everyone can get their issue featured on the front page of powerful liberal blogs such as the Huffington Post, Common Dreams or the Daily Kos, getting featured in blogs with small audiences that are read by a targeted group of people central to your issue can be very useful for your campaign.

Here are some steps to help you get coverage on blogs:

1. Determine if you have blog-worthy content. Is it newsworthy, timely, humorous, or controversial?
2. Search for blogs that are already covering the issue or are likely candidates
  - Search Technorati
  - Search [blogs.google.com](http://blogs.google.com)
  - Search BlogHer (if relevant)
  - Search the blog rolls of relevant blogs

- Peruse the blog to determine if it's worth contacting the author
  - Is it relevant to the issue you want to raise?
  - Is the readership active (commenting)?
  - Check the sitemeter for the number of hits to their site. Then reach out to the bloggers by email or post comments on the blog.
3. Email relevant bloggers. Take the time to customize the intros for top blogs you'd really like coverage in. Be sure to note why you feel this content is relevant to the topic of the blog and the readership. Consider asking the blogger if you can post a guest blog if they do that sort of thing.
  4. Post comments on relevant blogs. Make your comments thoughtful and relevant. Reference what stood out to you in the post or in other people's comments. Your goal is to add value to the conversation. If you are able to include a link to your content be sure it directly addresses the topic at hand. The more you post comments and engage with a blog, the more valued your contributions will be. This will help you develop a relationship with the blog author and will increase your chances of getting coverage or a guest post in the future.
  5. Follow-up. If you emailed blog authors, be sure to check Technorati to see if anyone has covered your issue. Post comments on blogs that do cover it.

### **Post on Listservs**

Listsers are a more personal way than blogs to reach out directly to potential members. Listserv traffic goes straight to most people's inboxes, so listserv moderators are generally very protective of the group to ensure that they don't get spammed. This means that posts to the listserv promoting a specific organization are almost always a big no-no. Therefore, it's really important to determine whether you have a true personal stake in the listserv and can genuinely participate as an individual, then find opportunities to raise your issue as it seems appropriate.

Sharing info about your issue will certainly be a good service for most of the listserv members, but it's a matter of very carefully finding the right moment and the right words. Timing and language are everything.

### **Track Your Progress!**

After all of this hard work, don't forget to track your progress on the Email Reporting sheet, collect the number of blog posts written about your campaign, take screenshots of posts and key pages, and tell the rest of your team (and the public) about how well you're doing. Your bosses, funders and the public will respond to both anecdotes as well as hard numbers from your campaign

# After You Hit Send

## Promoting Your Actions on Blogs and Social Networks

### CHECKLIST

#### \_\_\_\_\_ 1. Blog Post

- Post to your own blog, if you have one
- Respond to comments
- Email and Tweet the link to allies

#### \_\_\_\_\_ 2. Twitter

- Post Tweet that includes a link to the action (not just the blog post).
- Use [www.bit.ly](http://www.bit.ly) to shorten the URL.
- Monitor and respond to @replies
- Include the hashtag #[YOUR\_HASHTAG] (and #[TOPIC\_HASHTAG] if you have room)

#### \_\_\_\_\_ 3. Facebook: Organizational

- Post a link to your Facebook Group, Page, or Cause
- Post a link on related Facebook Pages

#### \_\_\_\_\_ 4. Facebook: Personal

- Status update
- Share action on Wall

#### \_\_\_\_\_ 5. Blogger Outreach

- Search blogs for posts on related topics
- Email relevant bloggers
- Post comments (if appropriate) on relevant blogs

#### \_\_\_\_\_ 6. Listservs

- Appropriate for publicizing local events
- Post a personal message, respectful and appropriate to the list



# WORKSHEET

## DRAFT AN EMAIL

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### Outline Your Email (10 minutes)

#### **MOMENT:**

What is this "moment" in your campaign?

#### **CHALLENGE (PROBLEM):**

What is the problem or challenge that you face on a larger scale? What about In this moment?

#### **OUTCOME (SOLUTION):**

What is the solution to your problem or the goal you need to reach? Where is the hope?

#### **CHOICE (YOUR ASK):**

What are you asking people to do? How can taking this action contribute to achieving your goal?

What's your strategy (theory of change)?

#### **THE DETAILS:**

What else do people need to know? What details could you provide to bring your story and your ask to life?

### **Draft Your Email (20 minutes)**

Draft your own email **as an individual** using the outline you created above. Make sure to fill in the information below.

Date email will be sent: \_\_\_\_\_

Name of Sender: \_\_\_\_\_

Subject Line: \_\_\_\_\_

Dear friend,

### **Share Your Email (15 minutes)**

Share your email with your group. Each small group will choose 1 email to share during the whole group debrief. As you listen, consider the following questions:

- Which email best captures the "moment" now?
- Which email tells the story of the campaign in vivid imagery and real people's stories?
- Which email has a clear, compelling ask?
- Is there any information that people still need to know?

## SOCIAL MEDIA

Social media are no substitute for strong email and offline campaigns. However, when you have strong campaigns in the work social media can help augment recruitment, tell the minute-to-minute story, and engage supporters one on one. One of the biggest advantages of social media is that compared to a regular website, social networking sites allow for two-way communication and collaboration. Another advantage of social networks is that each person has their own network of friends that you can engage, allowing you to exponentially grow your volunteer base. Make sure you let people know how they can get involved in every post, and be super-responsive to questions that are posted.

Two examples of organizations using social networking sites effectively are: (1) charity: water on Facebook and (2) DREAM Activist on Twitter.

Both organizations are posting content that is relevant and they are engaging their supporters with questions and answers. They also use pictures very well to help tell their story.

Dream Activist Twitter Page: <http://twitter.com/dreamact>

twitter

Home Profile Find People Settings Help Sign out

**DreamAct**

DRE CINTHYA TAM

✓ Following

Lists

**#newyork** hunger strike for **#DREAM** starts Monday: <http://bit.ly/dvFfgo>  
40 minutes ago via TweetDeck

@cnnmonica Great, hit up our press spokespeople. [media@thedreamiscoming.com](mailto:media@thedreamiscoming.com)  
about 6 hours ago via TweetDeck in reply to cnnmonica

Dream Activists: Gay and undocumented – On the frontlines in **#Arizona** – <http://bit.ly/czslEq> **#lgbt** **#dreamact** **#sb1070** **#legalizeaz**  
about 6 hours ago via TweetDeck

When it comes to going after what you love in life, don't take no for an answer. **#dreamactnow**  
about 15 hours ago via Twitter for iPhone

Drinking **#Fiji** water. **#NOT** **#JOke** **#latenight** @desidyke /via @JuanSaaa **#dreamact** doesn't approve. At all.  
about 15 hours ago via Twitter for iPhone

**#WIN** RT @MicEvHill: The McCain National Guard amendment fails by 9 votes. /via @JuanSaaa  
about 15 hours ago via Twitter for iPhone

RT @LizbethMateo: The 3 dreamers arrested at Feinstein's have been released. **#dreamact** <http://twitpic.com/1rpm6v>

Name DreamACTivist  
Location United States of America  
Web <http://dreamactivist.org>  
Bio DreamActivist – Undocumented Youth Action and Resource Network.

3,114 4,255 191  
following followers listed

Tweets 4,213

Favorites

Lists

@DreamAct/mayday  
@DreamAct/arizona  
@DreamAct/immigrantrights  
@DreamAct/dreamactivist  
@DreamAct/dream-act-students  
View all

Actions

block DreamAct  
report for spam

Following

Charity  
Water  
Facebook  
Page:

**charity: water**

WallInfoPhotosVideoCausesBoxes>>

Write something...

Attach:    

Share

charity: water + Otherscharity: waterJust Others



**charity: water** <http://www.charitywater.org/blog/square05262010>  
**from the office: drinks, conversation « charity: water log**  
[www.charitywater.org](http://www.charitywater.org)  
Did you miss last night's event at our office? No worries — catch it in photos. And we'll see you next time! A big thanks to Newmark Night Frank for putting us in a space we could never afford.  
3 hours ago · Comment · Like · Share  
2 people like this.  

Write a comment...



**charity: water** People from Murinja Village, Rwanda, gather to collect water from a charity: water well. (photo: Esther Havens)  
  
Yesterday at 2:03pm · Comment · Like · Share  
36 people like this.  

 **Briana Hoffer** :)  
Yesterday at 4:01pm · Flag

Write a comment...



**charity: water** [http://www.charitywater.org/mailings/mycw\\_members.html](http://www.charitywater.org/mailings/mycw_members.html)  
  
**mycharity: water | 2 million raised**  
[www.charitywater.org](http://www.charitywater.org)  
Today was a big day for clean water. Last September, we launched a website called mycharitywater.org and asked you to join us there. You and 27,000 others said yes and joined our mission to bring clean water ...  
Yesterday at 10:05am · Comment · Like · Share  
45 people like this.

# TEAM BREAKOUT SESSION:

## STORYTELLING FOR SOCIAL MEDIA

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Think about the use of stories throughout your work. By the end of this session you'll understand how stories can be used to enhance your overall digital program.

### GOALS

- Understand how you can enhance your organization's message through the use of social media
- Practice drafting a visual story of 'us' to spread the message of your organization on social media platforms
- Get feedback your drafted social media post/visual story of 'us'

### AGENDA

You have **30 minutes** to complete this exercise.

1. Take a few minutes to brainstorm who your members are. Use the attached worksheet and questions below to describe your 'us'. 4 min.
  - Why are they involved? Why do they care?
  - What are you collectively working towards?
  - What are their values?
2. Think about 2 stories you could tell that will illustrate the values of your "us". Sketch out two visuals that your organization could use to share stories on your social presence. What type of visuals can convey that message? A few things to keep in mind as you're sketching: 15 min.
  - What specific platform will these be shared on (e.g. Facebook, Twitter, etc)?
  - What do you consider powerful visuals that are connected to your mission? What would other people in your constituency connect with?

\*Keep in mind that if you are going to share a story on Facebook your visual should be square, not rectangular.
3. Find a partner. Take a few moments to share what each of you came up with and provide feedback. A few questions to think about as you share with your partner 6 min.
  - Do you think the visual matches the story?
  - What are some other visuals that could be used to evoke the same message, values and emotions?
4. Take a moment to revisit your description of your "Us". What are some other issues your audience might care about? How to you continue to build your base? What other organizations might be allies for you to cross-post? Make a list of potential partners for you to work with in the digital space. 5 min.



# WORKSHEET

## CREATE YOUR ONLINE CALENDAR

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A single email, Tweet or Facebook post rarely makes a dent in your effort to win concrete change. The best online efforts are campaigns that integrate various tactics toward a common end over a defined period of time. A campaign might last a few days, a week, or a few weeks.

Use this grid to map out your online campaign to support an offline event (for example, the two weeks leading up to your campaign launch). What's the narrative arc over time? How will you reinforce the same story across multiple channels over time? Look for areas of synergy. And remember your campaign doesn't end until you report back on what happened!

<b>Dates</b>							
<b>Emails</b>							
<b>Video, Photos</b>							
<b>Social Networking</b> Twitter, Facebook, etc.							
<b>Blogs</b>							
<b>Events</b> Rally, vigil, house parties, lobby day, press conf.							
<b>Field</b> Phones, canvass, volunteers, training							

# TIPS AND TRICKS

## FROM THE NEW ORGANIZING INSTITUTE COMMUNITY

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### Be More Like George Takei

While the technical tricks for increasing Facebook influence by boosting Edge Rank and [Affinity](#) can give you a boost, it's also important to remember that content is still king. And some of the best lessons in curating content on Facebook come from an unexpected source: [George Takei](#).



Best known for his seminal role on Star Trek, Takei is an actor and activist who has become one of Facebook's most dominant forces. His content is everywhere, and for good reason. Facebook knows content from Takei will spread like wildfire, so they make sure it lands at the top of his fans' newsfeeds. But his content doesn't spread just because Facebook's algorithm likes it. The real key to his success is great content management.

So what separates Takei from others? Here are a few things:

- **Let your personality come through.** You probably do this on your personal page without thinking about it, but it's important for your org or campaign to have a distinct personality, too. Reading George's page, you feel like you actually know him.
- **Focus on high quality content that's interactive.** Takei posts a lot of multimedia, especially pictures that have a riddle or puzzle included. Photos and videos are super shareable (and Facebook is more likely to show them to fans/friends than a status update or link).
- **The internet talks back.** George Takei often posts content sent to him by fans. Give your fans have a way to contribute, whether by highlighting things they submit, or encouraging comments and discussion.
- **It's not all about the same thing.** George Takei is a tireless crusader for many progressive issues, like LGBT and immigrant rights, but his posts aren't always about activism. More often, it's just fun or intriguing stuff he found or created. But his audience is so engaged that, when he does post a petition or make an ask, people are primed, ready, and eager to act and share. We should all be so lucky.

*Melissa Ryan and Evan Sutton run New Media and Communications for NOI (respectively). They spend far too much time on Facebook, and almost as much time arguing about whether Star Wars or Star Trek is better. (George Takei has called for a united front of all sci-fi fans against Twilight.)*

## Give your email personality

Email is a very personal communication medium, and the emails people look forward to getting are most likely from family and friends. So when you're writing an email, it's important not to sound like a newsletter or legal brief.

Here are a few things to think about:

- **How do you sound in an email to your coworkers?** Chances are you're not swearing, but you're not writing a formal letter either. That's generally the tone you want to convey with your supporters: professional, legitimate, and conversational, but not stuffy.
- **If the topic and subject of your email calls for it, be funny or snarky.** It will break up the monotony of the boring emails people often receive. Just make sure you have someone who knows how to write funny or snarky emails, because you don't want to confuse or offend your list.
- **Use voices and personalities in your email.** People don't want to receive emails from faceless organizations; they want to talk with real people.
- **Not every email needs to come from the same person.** During the Obama campaign in 2008, you received emails from a small cast of characters: Barack Obama, Michelle Obama, Joe Biden and David Plouffe. Each had their own role and voice. Real people talking about real things gives an authenticity people believe in.



Make emails professional, but conversational

People want to feel like they're interacting with a real person. Make sure your emails provide a human side in addition to the serious business of your organization.

*Lauren Miller is Director of Online Communications at Blue State Digital, and an NOI trainer and community member*

*Photo from Flickr user [garryknight](#), shared under [Creative Commons license](#)*

## Create engaging campaign follow up

Asking your supporters to take action is a great way to get them involved with your organization's goals and objectives. But, once someone has taken the time to sign your petition or write a letter to their representative, the ball is in your court.

- **Make sure you have a follow-up action planned.** Follow-up is an important part of every online campaign. For every action your supporters take, show how they helped accomplish something. This will make them more likely to support your next campaign, and invite their friends to take action, too.
- **Think outside the box and be creative in your follow-up.** Delivering a petition to the target legislator or organization is great, but ask yourself if there's a creative, engaging way to make the action come to life.

Here's an example from one of my favorite campaign follow-ups:

[Slow Food USA](#) recently completed a campaign aimed at raising awareness for Colony Collapse Disorder (CCD), an issue affecting honeybee colonies, which are critical to our nation's food supply. The campaign gathered nearly 50,000 signatures on a petition asking the FDA to investigate and eliminate the causes of CCD. Slow Food USA then hand-crafted paper bees - 1 for every 100 signatures on the petition - and "swarmed" the FDA with the delivery of hundreds of these bright and colorful paper bees. Photographs of people crafting these bees were used in follow up emails to show current and potential signees the progress on the campaign.



Campaigns should be a two-way conversation. We should reciprocate supporters' actions with an action of our own. A creative and well-executed campaign finale can act as an exclamation point to your message, and helps drive supporter involvement in future campaigns.

*Matt Burge is a Project Manager at [EchoDitto](#), and an NOI community member*

*Photo from [rityrats](#), via [Creative Commons](#)*

## Use kicker emails to boost action rate

Sometimes even your most ardent supporters need a reminder to take action on an email you sent them. That's why you should strap on your boots and send a follow up email called a kicker.

Here are a few key considerations for your kickers, as well as an example from a campaign I helped run.

- Send a kicker 3-5 days after you sent the initial email.
- The kicker should be short, to the point and have a somewhat more urgent message.
- Reinforce your theory of change and why it's critical that the reader takes action.
- Send the kicker email from a different person within your organization.



Here's an example of an email campaign including kickers that we ran at Freedom to Marry.

In September, we surveyed our supporter base as we began setting our priorities for 2012. The response was decent, but we wanted to hear from more of our supporters.

After tabulating the initial results, we sent two follow up emails. We sent one email to supporters who had taken the survey and a second email to supporters who had not taken the survey. Both emails reported back what areas our supporters told us they want us to focus on next year. The email to survey takers asked them to share the survey with family and friends to get more people to take the survey. The email to non-survey takers encouraged them to add their voices to the feedback we'd already gotten.

From the kicker email to non-survey takers alone, we more than doubled the number of people who took action simply by sending a follow up.

Simple kicker emails can dramatically increase your email action rates and increase the effectiveness of your campaigns.

*Michael Crawford is Director of Online Programs for [Freedom to Marry](#).*

*Photo from [sam metal vxv](#), via [Creative Commons](#)*

## Focus on conversion rates for fundraising:



I've seen many organizations myopically focused on open rate for their key email metric. It is a number that is easy to find, simple to interpret and accessible as a metric for people who aren't new media gurus.

But for fundraising (and most action-based emails), conversion rates are the most important metric. Not open rates, not click-through rates, but what percentage of your audience saw your email and donated money. It sounds simple, but your goal should be to raise money when you are sending a fundraising email. Focusing on conversions will help you run a better program, too!

- **It forces you to look holistically at the path the donor takes.** A good subject line should lead to a good ask, which hopefully leads to a good contribution form. An enticing subject line may boost your open rate, but without a dynamite ask and an easy contribution form your conversion rate will be poor.
- **You won't be as tempted to write gimmicky or misleading subject lines.** Sure, they might boost your open rate. But what matters is the entire donor experience. Open rates don't tell you if the donor felt misled after opening and reading your email. The subject line "Baby Lemur sneezing" might get a high open rate. But will those people donate, or unsubscribe?
- **It focuses you on action takers.** If you only tracked how much money an ask raised, you run the risk of believing an email was awesome because of one or two abnormally large contributions. Conversion rates are a much steadier metric to measure over time. Focusing only on the money raised can lead you to make incorrect assumptions later.

*Nate Thames is Political Director at ActBlue and an NOI trainer and community member*

*Photo from Flickr user [RambergMediaImages](#), shared under [Creative Commons license](#)*

# ADDITIONAL RESOURCES

## DOING IT YOURSELF

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NOI's Tips of the day- From taking care of yourself as a worker, to how to sort data in excel, NOI's Tips of the day email list offers morsels of advice relevant to every walk of life in organizing. Sign up at [www.neworganizing.com](http://www.neworganizing.com)

NOI's Online Toolbox- information for on the ground organizing as well as best practices for online organizing. <http://neworganizing.com/toolbox/organizing->

Online Politics 101: The Tools and Tactics of Online Political Advocacy . gathers the e.politics how-to articles into one conveniently packaged (and free) publication. Each chapter contains a link to the live version on [epolitics.com](http://epolitics.com) with updates and related materials. <http://www.epolitics.com/download-online-politics-101/>

10 Tips for Better Emails- by Lauren Miller, one of the best email writers out there. Lauren Miller is New Media Director for Elizabeth Warren, a member of the NOI Community, and one of the best trainers ever! <http://www.bluestatedigital.com/blog/entry/10-tips-for-better-emails/>

The Netroots Foundation New Media Blog- Tips and tricks for the best practices of social media. <http://www.netrootsfoundation.org/blog/>



# TEAM BREAKOUT SESSION

## TAKING IT HOME PLAN

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### GOALS

- Brainstorm various ways to use story to engage others to action after you leave the training.
- Draft a plan to outline ways in which you will use tools you've learned.

### AGENDA

Total time: 30 min

1.	<p>Gather in your groups. Choose a timekeeper and a scribe.</p> <p>As a group, brainstorm various ways in which you can use public narrative once you leave the training. When do you need to engage others to action with you?</p> <p>Brainstorm various ways in which you would “coach” others to use public narrative once you leave the training in your professional or personal lives.</p>	10 min.
2.	<p>Take some time as individuals to silently develop the way in which you will use public narrative after the training.</p> <p>Develop a strategy to reach your goals over the next 3 months.</p> <p><b>Use the worksheet on the next page for your plan.</b></p>	10 min.
3.	<p>Share your goal and strategy with a partner.</p> <p>For each person:</p> <ul style="list-style-type: none"><li>-3 minutes to tell your goal and strategy.</li><li>-2 minutes for feedback from your partner.</li><li>* Was there a specific goal?</li><li>* Were there specific tactics (strategy) to reach the goal?</li><li>* Do you have any suggestions to help your group member reach their goal?</li></ul>	10 min



# **PUBLIC NARRATIVE APPLICATIONS**

## **Taking It Home Worksheet**

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**What are the outcomes I want to see by July 2013?**

<b>Goal 1:</b>	<b>Goal 2:</b>	<b>Goal 3:</b>

**What will I do in April to begin on my outcomes?**

**What will I do in May to continue working towards my outcomes?**

**What will I do in June to ensure I meet my outcomes?**

Notes:

Notes:

Notes:

Notes: