COMMUNITY
ACTION
NETWORK

Communicating for Action

A Practical Handbook

by

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CAN Communicating for Action

OVERVIEW

During the time I've had the privilege of working with CAN I've learned many valuable lessons about the work of building and sustaining communities. Perhaps the most important lesson is that most of the time people already know how to do what they need to do or they already have the insight that will show the next step in the path. They are just too intimately enmeshed in the situation(s) to pull all the pieces together or get a coherent perspective.   They need a simple (though not simplistic) way to make sense of a given situation, generate actionable ideas, and to communicate those ideas in ways that others will act on them as well.

I've written this handbook to cover a range of topics that I have found to be particularly relevant and useful as I've worked with CAN. The topics are in no way exhaustive. Indeed, I hope that this will become the seed of a much larger, living document that will collect the rich experience and expertise and make them available to the entire community. I hope that it will be a spur to you to share your own good ideas and useful practices in doing the work of community.

I hope that as you read this handbook you think to yourself "Oh, yea, I know that" or "That reminds me of this other technique or framework that I use." And I hope you will write down the useful idea or technique that you use and share it with all of us.

I've focused on communication, because communication is at the heart of everything CAN does and can be one of the most elusive and difficult aspects of our collective work. Communication provides the means by which we are connected to each other and by which we can collaborate with each other to accomplish our shared goals. Communication is also the means by which we create the possibilities we want to pursue and mobilize the people and resources to make those possibilities real.

The tools and templates contained in this handbook are designed to complement the other resources that the CAN provides for the Austin and central Texas community. Along with providing the connections, information, and opportunity for the community to convene, the CAN is a rich resource of know-how and practical ideas for the community. It is in that spirit that this handbook is offered.

This Handbook made possible in part by the generous support of Advanced Micro Devices (AMD).

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How This Handbook is Organized

This handbook covers a range of topics that directly pertain to the process of moving from idea to action in the context of a community network. Some of the topics emphasize *understanding* different aspects of communicating for action (e.g., how networks function). The idea is that one is more effective to the extent that they have at least a workable theory for what they are doing.

Other topics are straightforward *frameworks or templates* for organizing and communicating ideas effectively (e.g., the advocacy templates). The idea is that sometimes we simply need a good recipe or rule of thumb for organizing and presenting our ideas.

I've organized the topics into general categories that reflect key aspects and processes in communicating for collective action. The general categories are listed in bold print, with the specific topics indicated in the bulleted subpoints.

The handbook is written as a series of connected topics, but each topic is covered in a way that it can stand on its own. Read through the entire handbook to get a holistic view of communicating for action OR focus on the specific topic/topics that are most relevant to you.

Collective Action in a Network

- Understanding and Using Networks
- Using Networks to Respond to Challenges and Opportunities
- Using Tight and Loose Networks

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- Making an Idea Worth Being Spread or Putting Words in People's Mouths

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Collective Action in a Network

Understanding and Using Networks

Networks in and of themselves do not take action. Networks enable *specific people* to take action by*:

1. Enabling people to recognize both opportunities and challenges, and

2. Enabling people to respond to the challenges and to capitalize on the opportunities by focusing themselves and resources in a timely way.

Using CAN as a Network

CAN can help articulate and identify challenges in a productive manner:

- Make talk about daily challenges a regular part of conversations—are there any trends or common challenges across the many different types of activities and organizations that comprise CAN.

- What are the particulars of the challenges that CAN members face? Are they material, financial, related to people, to circumstances?

- What are the causes of those challenges?

CAN can help articulate and identify opportunities in a way in which they can be acted upon:

- Opportunities are the corollaries of challenges—because challenges force us to think about what we are doing in new ways, many new opportunities will emerge simply from the thinking that goes into addressing the challenge.

- For most of the problems that CAN members face, opportunities will become visible as CAN members think differently about the challenges they face.

*see Ronald Burt "The Social Origins of Good Ideas," http://web.mit.edu/sorensen/www/SOGI.pdf

Using Networks to Respond to Challenges and Opportunities

Given that networks create the framework, relationships, and resources by which people can respond to challenges and opportunities, it is important to understand some of the different ways that networks can enable effective responses.*

Systematic Responses

In some cases, the challenges are recurrent enough, as are the responses, that systems can be created and put in place to meet them. The network in this case can be highly systematized and have well established routines that make it amenable to being charted or diagrammed.

What processes do you run that can be articulated, systematized, and perhaps even diagrammed?

Reactive Responses

In other cases, the challenges may be quite variable, but they can be addressed by members or resources in the network that are already known and well defined. As problems vary, existing resources can be reconfigured to address them. Although an organization may have never encountered a particular problem, we know that it fits well within the purview of a given committee or Issue Area Group. Responding, then, requires the network to determine which groups are best able to respond, configuring those groups appropriately, and letting them apply their expertise.

Who has what type of expertise and capability in your network and how flexibly can you combine people to meet new situations?

New/Emergent Responses

Some challenges are so unique or unforeseen, that they force the creation of a novel response, the chief characteristic of which is that members of the network are called upon to adapt their expertise in new ways or to quickly acquire new expertise. Configurations of people in the response may also be quite novel, creating situations in which people one might not expect to have working together, are working together.

How easily and quickly can folks in your network learn new skills or adapt their skills/expertise to completely unforeseen situations?

*based on "A Practical Guide to Networks," R. Cross, J. Leidtka, and L. Weiss, *Harvard Business Review, May 2005.*

Using Tight and Loose Networks

A network as large as the CAN is not actually one big network, but a network of networks. There may be quite a bit of overlap among the different networks that comprise the CAN (individuals will be active participants in different networks simultaneously).

Tight Networks

These are networks in which the members are:

- familiar with each other
- have similar technical knowledge
- deal with similar situations on a regular basis
- often work together in the same organization

These networks are useful for:

- Coming to understand the normal operating procedures for the group
- Learning the unspoken "rules" for doing things
- Creating and sustaining momentum for a cause or project
- Doing the daily work that is important for a given cause or project

Loose Networks

These are networks which may not appear to be networks at all because there is no readily visible structure or reason for members of different networks to regularly be in touch with each other or even know each other.

Sometimes referred to as "cluster and bridge" structures, loose networks rely on bridgers or connecters who move between the different clusters.

These bridgers, or brokers, can serve four very useful functions as they move between different clusters*:

- Make different clusters aware of each other and therefore potentially valuable connections they otherwise would not think of
- Transfer and translate useful practices between the different clusters, adding value and creating reason for the different clusters to be in contact with each other.
- Create useful and active collaboration among previously disconnected clusters that might even appear to be irrelevant to each other
- Sustain collaboration to the point of effecting synthesis of the two different clusters into a single, more effective cluster.

*adapted from Burt, "Social Origins of Good Ideas."

How Ideas Spread in a Network

Spreading Ideas

A very effective way to motivate people to action is to persuade them indirectly. Along with direct appeals and arguments, one should also put ideas and stories into circulation through different networks, especially the networks that are likely to be accessed by and have access to the person/people you are trying to persuade.

Put differently, you want to get the idea “out there” so that when (or if) you directly try to persuade a given person, they’ve already heard about the idea and may even already see why it is valuable.

When you are spreading an idea, you have two primary tools to work with:

People who will spread the idea for you
Opportunities for those people to communicate with other people

People Who Will Spread the Idea

In his book *Unleash Your Idea Virus,* marketing experts Seth Godin describes people who spread ideas as “sneezers,” and he says there are two kinds:

“Promiscuous” sneezers who will spread an idea just because they like to talk and be the ones who know something interesting.

“Powerful” sneezers who may not talk to as many people as promiscuous sneezers, but have the advantage of being authoritative and credible. If they’re saying it, it must be worth listening to.

In *The Tipping Point,* Malcolm Gladwell identifies three types of functions that people can play in the spread of ideas:

“Mavens”: people who love to collect knowledge and become storehouses of useful information

“Connectors”: people who connect people to people and people to ideas

“Evangelists”: people who actively sell ideas and try to “convert” others to see the value of the idea

Take stock of the people in your network and where or how they might fall into these categories. Think of the people to whom you have access and where they fall into these categories. Recognize that different people may play different roles depending on the idea or the issue.

Generally speaking, the more controversial or contentious the idea is, the better it is to have powerful “sneezers” spreading the word, at least initially. Evangelists tend to be the ones who adopt the ideas early on in the process, while “mavens” may not have a particular stake in spreading the ideas, but they are invaluable because they are repositories of useful knowledge—this means they may be able to see connections among ideas that you are not even aware of.

Go for different types of people and groups, not just numbers of people.

Opportunities for People to Spread the Idea

A first level is mediated communication, by which I mean the usual techniques in PR or advertising: flyers, newsletters, websites, press releases, what people typically mean when they talk about marketing.

A second, more important, level is direct communication among people, especially face to face communication. E-mails can be a good method, because they can be sent to many people at once, but nothing is as effective for spreading an idea as a face to face conversation. Not only does the recipient get the info/knowledge, they get the enthusiasm and passion that someone may feel about that idea.

The key idea here is to create opportunities for people to talk to each other informally. Parties, receptions, and other celebrations are a really good way to do this, because people will come but they don’t have the expectation of doing business. They are just there to talk. And, if you are able to circulate among the different people who are there, you have that many more opportunities to spread the idea yourself.

When you invite folks think about who is to be represented, what groups you would like to know about the idea, and how you would like them to act on the idea once they understand it.

Create opportunities to get feedback on the ideas and to learn the specifics of how the ideas are being put into practice.

Making an Idea Worth Being Spread or Putting Words in People's Mouths

If you've ever played the game "Telephone," you understand the challenges in getting a message and an idea to spread in the way you want it to be spread. The truth is that on the one hand, you can do some things to make it spread with a higher degree of "fidelity" while on the other hand the fact that no message spreads with complete fidelity can work to your advantage, but only if you pay attention.

The first step to spreading an idea is to build a succinct, compelling message around it. That message should do the following:

Name it: Give the idea a name, so that someone can refer to it as something other than "that idea." "Good Community is Good Business," or "Communication for Action," etc. are examples

Tag it: A tag is a slogan or a motto that encapsulates both the essence of the idea and its promise. GE "brings good things to life," or my program asks "What do you want your degree to mean?" or the CAN has the slogan "Moving From Ideas to Action." Think in terms of bumper stickers or t-shirts here.

Both the name and the tag are good ways to put words in peoples' mouths, which makes it easier for the idea to spread.

Focus on Benefits: What difference will it make? What's Austin going to be like if we do this?

Make it Concrete: Give examples of ways that this idea has worked and/or visualize what it will "look like" when this idea works. Tell it like it is, which means don't be afraid of it sounding simple. Simple is good, because that means people get it. And, better that they spread their simple understanding than not spread the more nuanced meaning you'd like them to. You will always understand your idea better than anyone—that's not the point.

Tell A Story: Quick stories are excellent ways to show what your idea means in practice—real examples of what's really happened are excellent, simple stories to tell.

The Benefits of Getting It Not Quite Right

If you keep track of how people "get it wrong" when they spread your idea, that can give you a tremendous resource for influencing your network. People will "distort" or modify an idea according to how they are making sense of it, what's appealing to them, what's not appealing to them, or how they want to "own" the idea themselves and thereby become part of its power.

Pay close attention, therefore, to how people talk about your idea, and then capitalize on that. If they get it wrong in ways that are detrimental to its power or are just wrong, then correct that. But more often than not, the nuances will make the idea more flexible and fluid.

If you are continually asking yourself why someone would translate your idea that way, you will can gain insight into how they think, how they approach problems, what their values are, and what's likely to motivate them.

Creating Opportunities/ Generating New Ideas

Creating New Opportunities

One very effective way to come up with new ideas and opportunities for your organization or the people you serve is to think about the many facets of the services you provide, the ways you interact with your constituencies, and the values that drive your organization.

Listed below are different sources of ideas and opportunities that might emerge from looking more closely at what you provide your clients and the different ways you interact with them.   These are adapted from Peter Drucker's "The Discipline of Innovation."

New Products: Provide a new product that offers new means to satisfy a need or desire or to solve a problem. Or improve on an existing product through new technologies, better access, making it cheaper.

New Service: Offer a new service that complements the product, makes it more effective, or provides new benefits to make the product that much more effective.

New Modes of Production: If you come up with more efficient ways to "produce" your service or product, then you are potentially able to serve more people, serve the same number of people more effectively, or if you use earned income strategies, generate more resources for your organization.

New Distribution Routes: Think about the ways that people literally access your services (and products).   This comes up very often when we think about the fact that services are available, but people just can't get to them. So, one very important area to be creative is in making it easier for people to access what you provide.

Relationship Building: This is something that all community providers understand, but it bears repeating. You can always improve your services and create new opportunities by building and maintaining good relationships with your "clients." A key part of building and maintaining a good relationship is in how you treat them, the services you provide, and by incorporating them into the process of creating and improving upon your services.

Every aspect of the services you provide and each step in the process by which you provide those services is an opportunity for innovation. An innovation does not have to be sweeping or "big" to have a large, valuable impact.

Judging New Opportunities

In judging a new opportunity, you are not necessarily trying to get it 100% right. You are trying to make an educated judgment, informed by the best information you can get and your own experience.

You are always working within contingent circumstances. That means that you don't have all the information you could have or need, that you are having to juggle interests of multiple stakeholders (which are often contradictory), and that the situation is constantly "susceptible to being otherwise."

The basis of a good decision is not that it is absolutely right. Even if it is "absolutely right," that doesn't mean that those you are trying to persuade will listen or understand that. The basis of a good decision is that you have made a well informed judgment and communicated it well enough to your audience that they will go with you down the path you are advocating.

If you want to know if you are making a good judgment, see if you can explain it convincingly to someone who's assent and participation you need and who is inclined to be skeptical (though not cynical). Assuming you are communicating clearly, if you can't persuade someone, it's probably not a good idea.

Most of making a good judgment is being able to articulate the criteria that have to be met in order for the course of action to have the desired results.

Generating New Ideas: The SCAMPER Method

The SCAMPER technique is a brainstorming method that builds one idea into several ideas by asking questions about the actions represented by the SCAMPER acronym. Alex Osborn, an early teacher of creativity, first introduced the idea of using questions to spur idea creation in his book *Applied Imagination*. This technique is very effective for idea generation because it builds with what is already available, thereby getting around the pressure of having to create something entirely new. You can run through all the different steps, or just focus on one step.

Substitute
Combine
Adapt
Minimize/**M**agnify
Put to other uses
Eliminate/**E**laborate
Reverse/**R**earrange

Substitute: What can you use instead of the materials, objects, places, or methods now used, especially if the materials, etc., you normally use are not available?

Combine: Which parts or ideas can you blend together? What could be added? How can you combine uses or materials? "One-stop shopping" centers where clients can have multiple needs met at one time are good examples of this. This is also a good way to build partnerships.

Adapt: What else is like this? What can be copied or imitated? How can it be adjusted to fit another purpose? What else is like this? What has worked before? What would you copy? Who else is doing a really good job at something that has a similar process?

Minimize: Can it be smaller, lighter, less frequent, or divided? How can it be made smaller or shorter? How can it take less time? This is especially effective if you are trying to attract new participants who may be reticent or unsure to become fully involved—enable them to become gradually more involved through a series of smaller steps.

Magnify: Can it be stronger, larger, higher, exaggerated, or more frequent? What happens if I exaggerate a component? How can it be made larger or stronger? What can be duplicated? Repeated?

Put to Other Uses: Can it be used in a way other than how it was intended to be used? Who else might be able to us it? What other market can it be used in?

What else can it be used for other than its original purpose? Adaptation, but in reverse—are there others who can benefit from what you've learned to do well? Are you willing to share?

Eliminate: What can you take away or remove? What parts aren't really necessary? Are there services or processes that interfere because they make things unnecessarily complicated or daunting?

Rearrange: Can parts be exchanged or the pattern changed? Can any components be interchanged? Can it be laid out differently? If you follow a regular process, might there be an advantage to shifting the flow of that process? Might you be able to serve different populations if you rearrange the way you provide services?

Working Together Collaboratively

Different Roles in Group Process

CAN works through a rich and varied collection of groups. There is a great deal of energy devoted to making those groups inclusive and to ensuring that everyone in the groups is moving in the same direction. However, tension and difference are essential to the creative process of group problem solving.

One way to use this idea is to recognize the different roles that people can play in group process, provided they are all committed to the group's overall mission.

People may play different roles in different situations, though not everybody has to be comfortable in every role.

The key is to recognize the roles that are helpful and to try to have at least one person playing each role.

Four Productive Roles in a Group

There are many different schemes for putting folks into categories to improve group work. Use whatever scheme makes the most sense for your group. Just use it in the interest of moving the group forward, rather than stereo-typing the folks in the group, thereby limiting them or justifying their unproductive behaviors.

The scheme I offer has to do with the functions involved in getting a group to understand and execute an idea.*

Initiating/Moving—these are the folks who often come up with the ideas and are the initial champions of the ideas. They are very important for keeping the idea moving through adversity, or for simply keeping it on people's radar. They can provide direction and motivation to keep moving.

Critiquing/Shaping—often seen as the nay-sayers, these are the people who raise the "yea, but" questions, which if done in the spirit of the overall goal of the effort, serves a very important function of preventing the group from pursuing unproductive ideas. Often the dissenter or the "devil's advocate," they are often willing to point out the one thing that no one else is willing to. As long as they do not argue simply for the sake of arguing, they are essential to the process of testing and refining ideas.

Adapting/Implementing—these are folks who are not all that concerned with the seemingly endless discussion about values and principles. They simply want to get on with it, and once a direction has been determined, they can take it and run. Because they are often the one's involved in implementing different schemes that different groups have developed, they can be an excellent resource for adapting ideas in light of experience they have had with other groups and other ideas.

Observing/Keeping Perspective—these are often the folks who are the most reticent to speak and appear to simply be taking everything in. They are sometimes the folks who have "been around" for a while and have seen many ideas some and go. If not jaded and cynical, they provide the very necessary wisdom to fit an idea into a historical context or to help folks in the group remember the overall mission of the group.

Different people can play different roles depending on their charge relative to the work at hand, their natural tendencies, or simply how they decide they want to be involved in the process.

Rather than assessing folks to see into which of these categories they fit, for a given project, lay out the tasks that the person who fills these roles will have to perform and then allow folks to volunteer to fill those roles.

What is absolutely essential for this process to work well is a commitment on the part of all involved to the project and the overall goals. This defines the difference between productive critique and destructive cynicism.

*The four part framework and roles are adapted from William Isaacs, *Dialogue: The Art of Thinking Together.*

Tasks/Questions for Each Role

The questions listed below reflect the work to be done in performing each role. In a given group, different people will fulfill these different roles at different times. It's important not to typecast or assign people to roles beyond those to which they will naturally tend.

Initiating/Moving

- What's the vision for the idea, both as it's evolving and once it's finished?
- How is it consistent with the mission of the group?
- How is it consistent with the values of the group?
- What's at stake such that being aware of it will motivate group?
- What's important to this group?
- What motivates the members of the group and how can I cast my idea in those terms?

Critiquing/Shaping

- Are we being realistic and taking into account the roadblocks which if we consider them now, will be less likely to cause problems later?
- What's at stake such that being aware of it will caution us?
- Are we staying true to the goals we set out at the beginning?
- Are we considering the alternatives, especially the alternatives that we don't like or actively oppose?

Adapting/Implementing

- What's the plan?
- What resources, people, and materials do we need?
- By when and in what order?
- How will we know if we are on track?
- How will we know if we are off track or making mistakes?
- How will we know when we are finished?
- How will we know that we've done well?

Observing/Keeping Perspective

- To the extent that we've "been down this road before," what did we learn last time?
- Are there analogous or related situations that we can learn from as we carry this idea out?
- What are the long term implications of doing this work?
- Who else is likely to be affected by what we do? How?

Collaborative Communication

Suspend Judgment

Maintain a commitment to the broader joint purpose, rather than to your own position. It's okay to be "wrong" with your specific viewpoint in the interest of moving the overall project forward.

Play by the rules of "Yes-And". Nothing is eliminated initially or out of hand. Work in a collaborative spirit—generate options, then make judgments according to articulated values.

Don't Disagree Too Quickly

- Where do you agree with the person presenting?
- Where do you not necessarily agree, but what they are saying sounds plausible?
- Where are you not sure what they are talking about, but you don't disagree, and can give them the benefit of the doubt?

Try It Out

- Treat a proposal as a prototype—a very well articulated first shot at a solution.
- Build off the proposal to generate options together.

Listen for Value

- What really stands out/strikes you about this presentation?
- What questions does the presentation raise?
- From what/who you know, what can you offer the presenters to help it go forward (resources, network/influence, productive exemplars)?
- If it's not worth forwarding in it's current form, what do you suggest for a more productive approach to the issue or for a more productive understanding of the problem/issue?
- For any questions you raise, why do you raise them, and what can you offer to help the presenter answer them?

Facilitating Meetings with Community Groups

This process works best if there is one person asking questions and facilitating discussion and one person taking notes.

As soon as the meeting is finished, the facilitator and note-taker should meet and compare notes and perceptions.

Primary things to listen for and make note of:

Specific challenges, barriers, needs, or issues that members of the group explicitly mention.

Challenges, barriers, etc., that are not explicitly articulated, but are strongly implied or logically follow from what members of the group are saying.

Areas where there are strong feelings, positive or negative—note the areas and the feelings associated with them.

Facilitating the Discussion

Suspend judgment—do not become defensive if someone criticizes something you are associated with or feel strongly about.

Get as many different perspectives voiced as you can. Allow questions and discussion, but only if they help clarify or add to what's being said. In particular, limit disagreement over whether what someone said is the case or not. If it's someone's perspective, then it's worth gathering.

A good tactic, especially if the group gets stuck, is to *ask for specific instances* that illustrate more general points that have been brought up. If someone, for example, mentions lack of access to technology, ask them to describe an instance in which they lacked technology and the impact.

The $$ question: Everyone needs more funding. When this comes up, as it will, ask them to describe what they would do if they got the funding. Or, ask for specific details about what is getting in the way of getting funding.

Listen for common themes and offer those back to the group to affirm, modify, or disagree with.

Don't be afraid to name the dragon in the middle of the room. That is, name the issue that everyone is pointing at, but no one will explicitly state. Like, lack of cooperation among certain groups, or fear on the part of groups of being evaluated, etc.

When you are taking notes and listening for themes, you are not going for detailed accuracy. You are going for accurate reflection of the major themes and issues and the feelings around those themes and issues. e.g., You are getting a feel for the forest—it's a okay if you don't document a few of the trees.

Inventing and Structuring Plans

The Advocacy Model--Overview

The single most important thing to remember about policy arguments is that they are 1) focused on changing or influencing *behavior* and 2) they are focused on changing or influencing the behavior of *individuals*.

Policies, in other words, are simply behaviors generalized to an entire group or population. And, even though they may be designed to affect entire groups, they affect the group one individual at a time.

Below is a general structure for a policy argument. Use it as a template for developing plans and for the presentations of those plans. Each topic is also developed as it's own tool in subsequent pages.

It's important to note that although the structure focuses on the negative reality of problems, and problems are very compelling, the real benefit of the structure comes from the vision and demonstrable viability of the resulting plan.

In other words, no one funds or supports problems—they fund or support viable, exciting, solutions to those problems.*

Problem—What's wrong? Who's affected?

There are few motives for people as strong as the realization that there is a problem that needs to be addressed urgently.

Cause—What sources/people are responsible?

What's causing the problem or what are the most salient sources that are creating the conditions that are feeding the problem.

Plan—What do we need to do about it?

The plan is what you advocate for. A good plan will address problems in the short term and go after causes in the longer term.

Cost/Benefit—What will it take to make this happen (materially and emotionally) and why will it be worth it.

Good stories are just as important here as numbers.

*This framework is adapted from E. Inch and B. Warnick, *Critical Thinking and Communication, 3rd Ed.*

Advocacy—Demonstrating the Problem

Laying out the problem, especially in the beginning of a presentation or group session, is an excellent way to help an audience appreciate the significance or the relevance of the issue.

The trick is to explain it in a way that is compelling enough to get their attention and to get them to take it seriously without overwhelming them.

A good way to do this is to explain the problem in general terms, giving them an overall picture of the situation, and then to break it into individual pieces that are more manageable. Say something to the effect that "We have this big problem, and I'm showing you this so you understand everything that's going on and what's at stake—BUT, we are not going to tackle the entire thing. We are going to break it into these pieces, and we're going to begin by addressing this specific piece right here …"

An effective demonstration of a problem covers both the *quantitative* and the *qualitative* aspects of the problem. In short, how many are affected and how bad is it?

A final, and important point is that these two aspects reinforce each other. The most pressing problem would be one that is awful qualitatively and affects a large number of people. But, even a problem that affects a small number of people but is really terrible qualitatively is compelling (especially if the problem might spread).

Quantitative Aspects

How many people are currently affected? How many people could be or will be affected if we do nothing? Projections are very powerful for demonstrating quantity, especially if you are dealing with a problem that might spread exponentially (like an epidemic).

Talk both in absolute numbers and in percentages of populations. Remember that not all populations are equal. If there are certain populations that are of greater concern, focus on the impact on those populations. Also, talk about impact on multiple populations--a problem that may not affect a large number of people, but it does affect a large variety of types of people.

Qualitative Aspects

What's it like to be affected by this problem? Once you've shown the numbers of people affected, you really grab your audience by giving them some felt sense of what it's like to be affected. This is why stories and photographs are so effective at showing these aspects of a problem.

Remember that different people experience the same problem differently. Representative anecdotes from different constituencies can be very effective at showing that the impact of a problem is far reaching.

Advocacy—Articulating the Cause

To really address a problem, a plan has to address the causes of the problem. This can be particularly daunting with problems with health and human services because the causes are so complex and interlocking.

When you think about causes, think about anything that is an origin, contributes to, is responsible for, or leads to the problem in question.

A good strategy for making the complexity manageable is to break it into smaller pieces and then to address those pieces in sequence.

Despite the fact that there are many overlapping causes to a problem, you can think of two general types of causes:

Structural: causes that relate to infrastructure, laws/rules, culture, etc.

Attitudinal: causes that relate to individuals' or groups' attitudes.

Structural Causes

Examples of structural causes are laws, rules, access to resources (or lack thereof), cultural values, traditions. A good way to discover structural causes is to listen for the influences that people see as being beyond them. A classic example is someone saying that they don't make the rules, they simply follow them.

A good tactic for making structural causes manageable is to find specific people who embody or represent the structures in question—in other words, put a face on the cause (though not a scapegoat).

Attitudinal Causes

These are internal values and beliefs that motivate people to do things that create problems or prevent them from doing things to solve or change the problems.

A good way to identify and engage attitudinal causes is to focus on behavior, both as a way to make the cause "visible" and as a way to address it. It's the classic parenting move of making a judgment about the behavior, not the child. This way you have a better chance of doing something about the cause without resorting to blaming someone.

Advocacy—Laying Out a Compelling Plan

The plan is, of course, what you are advocating for--what you are trying to make happen. Think in terms of two aspects:

***Agent(s)*:** Who (individuals, groups, etc.) will actually carry out this plan?

Who's already working on this issue?

> This includes both competitors who might compete for resources or for share of the problem and potential partners.

Who are the "complementors?"

> These are people who are not directly working on the problem per se, but provide necessary resources or know-how. Or, they work in areas that are directly related to the problem you are addressing.

What kind of team, made up of whom, do you envision needing to carry this out?

> Think of the team in terms of what each person on the team would be able to do to directly impact the problem, not just that they represent certain groups. Or, teams should not be chosen according to a principle of being inclusive. Inclusion can be a consideration when thinking about who to keep informed, etc.

***Mandate*:** What, exactly, does the plan call for?

As much as possible, state this in concrete terms—think job descriptions, schedules, deliverables.

Is there anyone already doing this? Has anyone done this in the past or in a different place (i.e., best practices or even good enough practices)?

> Don't reinvent any wheels you don't have to. If it works well, borrow it and adapt it. Just be sure it can in fact be adapted without causing new problems.

Make a call to action that fits the specific people in your audience.

> Always ask yourself what the specific people listening to your "presentation" can do to help execute the plan.
> Make it easy for them to find something they can do, however small it is.
> Larger contributions will develop from smaller ones.

Advocacy—Framing Costs/Visualizing Benefits

It is important to frame cost appropriately—that is, make it clear what the costs will be, but also how resources will be used.

Cost is not just material or financial. It is also emotional and attitudinal. Any time you are asking people to do something different, there is the emotional "cost" of changing habits, patterns of thinking, and policies. There is also the cost of potentially having to admit that old ways of thinking needed to be updated or were even wrong.

Perhaps the best way to frame costs is to feature them as an investment that will lead to benefits.

It's important to remember when talking about cost that folks will "pay" for the plan if they feel the situation is bad enough and if they have reason to believe that the plan will work.

When demonstrating benefits, it is very important to do more than simply list the benefits. One has to paint a picture that shows what life will be like if the problem is solved, or even just ameliorated. In painting a picture to visualize benefits, it's important to show in detail how the plan will work.

One very effective tactic for demonstrating the benefits is to show how a plan like the plan you are advocated yielded benefits in other, similar situations. This tactic is especially effective if one can draw analogies to situations that the audience is familiar with.

Another to frame the benefits of a plan is to visualize what will happen if nothing is done. In other words, if it's difficult to present how things will be better, a fall back position may be to show that at the very least the plan will keep the situation from getting any worse.

It is equally important to remember that both parts of the argument have to be made. In the long run, it's not enough to simply make a really compelling case for the fact that there's a problem—you also have to show that you have a viable solution to that problem and demonstrate that it has a shot at working.

The Business/Venture Plan Model

Like the Advocacy Model, the Venture Plan Model is a powerful framework for organizing presentations to constituencies, especially presentations that seek investors or partners.

As with the Advocacy Model, the real value is not just in providing a framework for a presentation. It lies in the list of topics it encourages you to consider as you put your material together and therefore in the way it encourages you to think about your work.

An advantage of this model is that it tracks with the way the business world thinks about ventures, especially ventures that they have not yet undertaken. This model provides you with a way to talk about your work in terms and language that will resonate in a business context.

I've listed each topic below in the logical order in which they would be discussed in a presention, adapted to fit the specifics of a community based organization.

Title: The name of your organization or the name of the project you are proposing. Titles are important for projects because they provide a focused expression of what you intend to do. Title also make it easier for people to remember the specifics when they want to tell others about the idea.

Problem/Situation: What problem or situation are you addressing? Describe it succinctly, telling how many people are affected and what it's like to be affected. You can address the problem both at the general level (e.g., the general problem of homelessness) or the specific level of what you are proposing to do (e.g., find ways to teach life skills in homeless shelters).

Solution: What are you going to do to alleviate the problem. In a presentation, there's no need to go into exhaustive detail. Focus on the key work that you will do. Be sure that it corresponds with the title you've given the project at the outset.

Logistics: If need be, explain the details of how you'll carry out the solution. In business terms, this would be the business model (how you get product to customers so you can get paid). The key here is to provide enough detail for your audience to believe it will work, without overwhelming them with details. Details can be covered in the follow-up.

What Makes You Particularly Able to do this: What is it about you that makes you able to provide this solution effectively? It might be organization, connections, the people who work for you, or an innovative model. This is sometimes referred to as the "magic," or "competitive advantage." The real power of articulating this is that it will encourage (or force) you to articulate what really sets you apart and accounts for your effectiveness.

Marketing Plan: How you let people know you are here and what you provide. You are thinking about two general categories of people: People who need what you have to offer and people who want to support or help you provide for those people. Often the most important thing to communicate is the specifics of how people can get involved—not just selling them on the idea.

Competition: Who else is doing what you are doing and how are you both like and different from them? In the broadest sense, competition is an affirmation that at least someone has found a way to do what you are proposing. Distinguish yourself, yes, but also highlight where you have favorable similarities to and potentially complement other successful ventures.

Metrics: How will you know you are succeeding? According to what timeline? Balance differences between your internal metrics and the metrics that might be imposed from outside your organization.

Partnering Plan: If you are trying to create a partnership, how would that partnership work and what benefits would accrue to the partners that would not without a partnership?

Key Team Members: Who are the key members of your staff or team that ensure that you will be able to carry out what you propose to do. Think in terms of demonstrating the competencies and capabilities that are necessary to get the work done.

Next Steps/Call to Action: Where do things stand? What are the short term plans you have? What specifically are you requesting from your audience? Assuming that they want to work with you, how can they get involved now. One of the most effective ways to motivate someone is to give them something to do in the immediate future. A good tactic to lay out the project in phases and invite them to participate in the first phase. This way, if they are not ready to commit to the entire project, but want to be involved, they have a way to do that.

Effective Presentations

Persuading an Audience

An audience is persuaded because a speaker makes the right appeals. Appeals are general strategies to persuade and motivate an audience. They can be used at any point in a presentation, but there is a general pattern for using these appeals:

Ethical or Personal Appeals (*ethos*)—think of ethos as those elements of who you are and what you are connected with that make you trustworthy and therefore persuasive.

> While your reputation may precede you, you still have to demonstrate ethos. Generally you can demonstrate personal ethos by communicating that you are a good person, by showing that you know what you are talking about, and by showing that you really care about your audience.
>
> Just as there is guilt by association, there is ethos by association. Who you are associated with can have a huge impact.
>
> One good illustration of ethos in the community are the people who seem to be able to get and keep things moving by virtue of <u>who they are</u> and the force of their will and personality.
>
> Who seems to have a lot of ethos in the community? From what does it derive? What is the basis of *your* credibility? Where might it be lacking? What can you do to shore it up or establish it?

Logical or Rational Appeals (*logos)*—What people typically think about when they think about arguing and persuading—how logical and clear are your reasons? How well do you present them? Can you follow them? Do you provide evidence?

> What type of reasoning will be most effective? Do you need to start with accepted ideas or "truths" and reason from there or do you need to present cases and draw conclusions from those? How does your audience "see" the situation and does the organization of your material match that?

Emotional Appeals (*pathos*)—what emotional responses on the part of the audience do you need to arouse or calm in order to move them in the right direction? What mood do you need to set (calm, urgency, panic, optimistic).

> <u>For</u> any of the emotions you feel about the issue at hand, what stories, examples, facts and figures, etc., arouse those emotions? For key constituents you want to influence, what arouses the emotions in them? What's the appropriate emotional tone for the situation at hand?

Thoughts About Powerpoint

Powerpoint is the coin of the realm, so be prepared to use it. There are many guidelines, especially about formatting and preparing slides, so take a look at some of these guides.

Remember that if your slides are full of words, you are not providing visuals, you are projecting type. That means that people are not looking at a picture, they are reading a screen. There are good reasons to do this, but if that's all you do, you are not using the medium to its potential.

If you have a lot of information to provide for them to read, put it in a handout. Use Powerpoint to provide an outline of the information you are going to cover, both to make it easier for the audience to follow and to keep you on track.

A very effective way to use Powerpoint is to project diagrams, photographs, and other representations that either illustrate what you are talking about and/or which arouse the emotion and mood you are trying to evoke.

According to Guy Kawasaki, one should think in terms of the "10/20/30" rule when making powerpoint presentations:

10 Slides in 20 minutes with at least 30 pt. font

The "Elevator Pitch"

The essence of the "elevator pitch" is to get someone's attention, attract their interest, and give them enough information about what you are doing that they wan to talk further.

The basic elements of an elevator pitch are the same as the elements of "spreading an idea," mentioned earlier because the essence of spreading an idea is to be able to make it compelling, quickly.

Name it: Give the idea a name, so that someone can refer to it as something other than "that idea." "Good Community is Good Business," or "Communication for Action," etc. are examples

Tag it: A tag is a slogan or a motto that encapsulates both the essence of the idea and its promise. GE "brings good things to life," or my program asks "What do you want your degree to mean?" or the CAN has the slogan "Moving from Idea to Action." Think in terms of bumper stickers or t-shirts here.

Both the name and the tag are good ways to put words in peoples' mouths, which makes it that much easier for the idea to spread.

Focus on Benefits: What difference will it make? What's Austin going to be like if we do this?

Make it Concrete: Tell it like it is, which means don't be afraid of it sounding simple. Simple is good, because that means people get it. And, better that they spread their simple understanding than not spread the more nuanced meaning you'd like them to. You will always understand your idea better than anyone—that's not the point.

Have an "Ask": Or at least be prepared to ask for something, even if it is just asking for a follow up conversation. There may not be an opportunity, but you want to have a good answer, especially if someone asks what they can do for you. Nothing is as motivating as knowing what to do next.

Believe It Yourself: It may seem obvious, but if you do not believe in your work and what you are trying to do, nobody else will. And, you both have to believe *in* your work and believe that your idea will work—that is, you have to be an idealist and a pragmatist all at once. Equally important is to be enthusiastic. This doesn't being gushing or cheap. It means showing the passion and energy that makes you continue to pursue this work.

The Short Presentation (5 – 10 min)

This basic structure works well when you don't have much time, either in a formal presentation (as in you are standing up in front of a room of people) or in a meeting.

Intro: Let people know what you are going to be talking about, why it's important to them, and what you're going to cover. This shouldn't take more than a few sentences.

Body: Present the two or three most compelling pieces of information you have and come to the point quickly. One of the biggest mistakes people make is to talk about information (typically data, stories, etc.) that are relevant but do not make the most compelling point. If you have a good amount of data to present, put it in a handout. You are much better served presenting some key points and then talking about the implications of those points for the people in the room or for people they care about.

Most importantly, make it very clear what you think should happen. Have a clear call to action.

Conclusion: Summarize the key points and state your conclusion in a way that it will be easy for those who have heard your presentation to be able to tell others about it (see Spreading Ideas). You should imagine that people who hear you are going to leave the presentation and go talk to other folks about what they heard. THEN, give them a tangible step they can take soon—it may be contacting someone, gathering information, calling a meeting, etc.

Ideally someone will come out of your presentation motivated to act and with a clear sense of how to act on what you have told them.

The Longer Presentation (15 – 20 min)

The basic goal of a longer presentation is the same as the goal of shorter presentation: For your audience to know, feel, and act in a way you advocate on an issue that is important to all of them.

The guidelines that apply to the shorter presentation also apply to a longer presentation, especially in terms of keeping the material clear, making key points in the presentation itself and putting other supporting points in a handout, and making a clear call to action.

The primary advantage is that a longer presentation provides more opportunity to give more information, tell more stories, and to develop the material that much more. The primary danger in a longer presentation is that you will overwhelm your audience or go into irrelevant tangents.

One thing you can do in a longer presentation that you cannot do as well in a shorter presentation is anticipate and preemptively address objections that you know the audience is likely to have. In a shorter presentation, these are likely to come up in questions and answers. In a longer presentation, you can build them into your presentation and address them up front.