



# Look for the Table Tents

Please sit at the table with the Table Tent that has the name of your organization.



**LEAD!LOA**  
LEADERSHIP &  
ORGANIZING  
IN ACTION

# LEAD! LOA

## Leadership & Organizing in Action

**Community Organizing Training Workshop:** Building Shared Power, Shared Purpose & Collective Capacity

RAE Regions 1 HTP Participants & Community Members

May 5, 2023

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# Telligen Supports Quality Improvement (QI)

- Telligen is a population health solutions company ([www.telligen.com](http://www.telligen.com))
- **Our Mission:** Transform Lives and Economies by Improving Health
- We partner with U.S. government agencies, state Medicaid agencies and health plans to improve health outcomes
- In November 2019, Telligen was selected by the Centers for Medicare & Medicaid Services (CMS) to serve as the **Quality Innovation Network-Quality Improvement Organization (QIN-QIO)** for Colorado, Illinois, Iowa and Oklahoma
- In October 2020, Telligen was selected by CMS to serve as a **Hospital Quality Improvement Contractor (HQIC)** to provide targeted quality improvement assistance to small, rural and critical access hospitals

# What Do QIN-QIOs Do?

## QIO Program Purpose

- To improve the efficiency, effectiveness, economy and quality of services delivered to Medicare beneficiaries

## QIN-QIOs

- Bring Medicare beneficiaries, providers and communities together in data-driven initiatives that increase patient safety, make communities healthier, better coordinate post-hospital care and improve clinical quality
- Provide technical assistance and convene learning and action networks at no-cost to support healthcare QI at the community level

Why are we  
here today?





## Special thanks to the Workshop Coordinating Team:

- Audrey Oldright
- Barbara Bishop
- Brandi Vela
- Kellee Beckworth
- Marnell Bradfield
- Sarah Meade
- Sherri Corey





WESTERN HEALTHCARE ALLIANCE  
COMMUNITY CARE ALLIANCE

Huge Gratitude &  
Appreciation to our  
Sponsors for  
Refreshments today!!

# Purpose & Objectives/s for this Training

To introduce you to the framework and **practices of community organizing** to build your leadership skills and increase your capacity to make lasting change

To equip you with the **tools to effectively Lead Change** and **shape the future of health, healthcare and aging** in our own communities and in the communities we work with.



# Today's Agenda

Worksheet Packet p. 3

Time (MT)	Topic
9-9:20a	Welcome
9:20-9:35a	Working Together
9:35-9:50a	Overview of the Framework
9:50-10:20a	The Organizing Statement
10:20-10:30a	Wellness Break
10:30-10:50a	Shared Story Part I: Finding Your Why
10:50a -12n	Shared Story Part II: Public Narrative - Story of Self
12-12:30p	Lunch Onsite
12:30-1:50pm	Shared Story Part III: Public Narrative – Linking Self, Us & Now
1:50-1:55p	Wellness/Energizer Break
1:55-2:50p	Shared Commitment Part I: Mapping Actors & Assets
2:50-2:55p	Quick Energizer if needed
2:55-3:10p	Shared Commitment Part II: Building Relationships
3:10-3:25p	Shared Strategy & Action: Measures, Tactics & Timeline
3:25-3:45p	Wrap-up

# Quick Intros

## Who is Here Today?

- Hospitals
- RAE Staff
- Regional Health Connectors (RHCs)
- Health Alliances/Coalitions
- Who else is here?
- Level of Familiarity with HTP: **Fist to 5**
- Introduce yourself to someone at your table that you don't know/well **~1m each**

# Working Together

- **Covenants of Presence:** Round Robin p.6

Worksheet Packet p.6

“The willingness  
to show up  
changes us. It  
makes us a little  
braver each  
time.”

—Brené Brown,

# Covenants of Presence 1-5

Worksheet Packet p.6

**1. BE FULLY PRESENT, EXTEND AND PRESUME WELCOME.**

Set aside the usual distractions of things undone from yesterday, things to do tomorrow. Welcome others into this space and presume you are welcomed as well.

**2. LISTEN GENEROUSLY.**

Listen intently to what is said; listen to the feelings beneath the words. As Quaker Douglas Steere writes, “To listen another’s soul into life, into a condition of disclosure and discovery may be almost the greatest gift we can offer to another.”

**3. AUTHOR YOUR STORY.**

We all have a story. Some might say, “I don’t have a story” or “a story worth telling,” but you do, and the world needs to hear it. Claim authorship of your own story and learn to tell it to others so they might understand you, be inspired by you and discover what calls you to be who you are, to do what you do or to love what you love.

**4. WE COME AS EQUALS.**

We don’t have the same gifts, limits or experiences, but no person’s gifts, limits or experiences are more or less important than another’s.

**5. IT IS NEVER “SHARE OR DIE.”**

You will be invited to share stories in pairs and in a large group. The invitation is exactly that. You will determine the extent of which you want to participate.

# Covenants of Presence 6-10

Worksheet Packet p.6

**6. NO FIXING.**

We are not here to set someone else straight, right a wrong, or provide therapy.

**7. SUSPEND JUDGMENT.**

Set aside your judgments. By creating a space between judgments and reactions, we can listen to another person, and to ourselves, more fully.

**8. TURN TO WONDER.**

If you find yourself becoming judgmental, cynical or certain about what you know, try turning to wonder: “I wonder why she shared that story or made those choices?” “I wonder what my reaction teaches me?” “I wonder how my story connects to their stories?”

**9. HOLD THESE STORIES WITH CARE.**

Many people will benefit from what they hear during our time together. Be mindful, attentive and open.

**10. BE MINDFUL AND RESPECTFUL OF TIME.**

We all have something important to share and the discipline of time invites us to focus and make particular choices about what, and how much to share so that we might hear each other more deeply.

# Covenants of Presence 11-14

Worksheet Packet p.6

## **11. PRACTICE CONFIDENTIALITY CARE.**

We create a safe space by respecting the nature and content of the stories heard. If anyone asks that a story shared be kept in confidence, the group will honor that request.

## **12. WELCOME DISCOMFORT.**

In the midst of new and uncomfortable places and the company of strangers, move against an instinct to hide or to check out. In what causes unease, see another world to be discovered.

## **13. LOVE THE QUESTIONS THEMSELVES.**

Let your questions linger. Release the compulsion to answer them or to have them answered. Trust the questions to guide you toward loving first what you do not altogether understand. As the poet Rainer Maria Rilke says, “Have patience with all that remains unsolved within your heart.”

## **14. BELIEVE THAT IT IS POSSIBLE.**

Believe that it is possible for us to emerge from our time together refreshed, surprised and less burdened than when we came. Expect that our work together can provide renewal, refreshment and possibilities for what we can do together to create the future that is waiting to be born, and that seeds planted here will keep growing and flourish in the days ahead in the service of our work in this community.



# Other Agreements (Norms)

- Commit to being fully present for the entire training
- Hold on to your worksheet packet, you will need it for the practice activities
- Honor our start/end/break & lunch time
- Honor the time limits in the practice activities
- Step-up/Step back
- Commit to "trying on" the skill - discomfort is evidence of growth
- Participate like there's a prize to win
- Lean into the wisdom of your training team and table mates
- Move your body if you need to move
- **Anything else?**

# What's on/at/near your table?

- Electronic Template Request
- Key Insights & Shout Outs
- Examples
- Tissues
- Flip Charts
- Stickies
- Markers
- Candies

# What to expect

## Pedagogy & Flow



## Practice Activities

- They'll go QUICKLY
- What's the deal with the time limits?
- You'll be in Triads or 'Community Groups'
- You'll be using phone alarms
- We will be walking around
- Raise your hand if you have a question or need help
- We'd love for you to share - call out great examples
- Practice coaching . . .



**What do you see in this picture?**

## Coaching & Learning From Each Other

- Important leadership skill
- Develops skills, insights, confidence
- Honest observation – without judgment (negative or positive)
- Provocative questions that lead to insights, ideas, realizations, and growth
- Focus is on building up others, not on our own knowledge or advice
- Builds both individual and team capacity

Less Powerful Questions

More Powerful Questions



Yes/No   Which?   Who?   When?   Where?   What?   How?   Why?\*   What if?

- *Did you try this? Are you talking to . . .?*
- *Which interventions are you using?*
- *Who is on your coalition? When did that happen? Where is your leadership team?*
- *What have you tried so far? What worked/didn't? What has enabled success so far?*
- *How is that working? How can you tell? How will you . . .?*
- *Why\* did you take that approach?*
- *What if you had other allies? What if the office manager was a champion. . .?*

**\* NOTE:** “Why?” questions can evoke a defensive response and undermine growth. They are powerful and need careful construction.

## Constructing Powerful Questions

# The Framework

## What is Community Organizing?

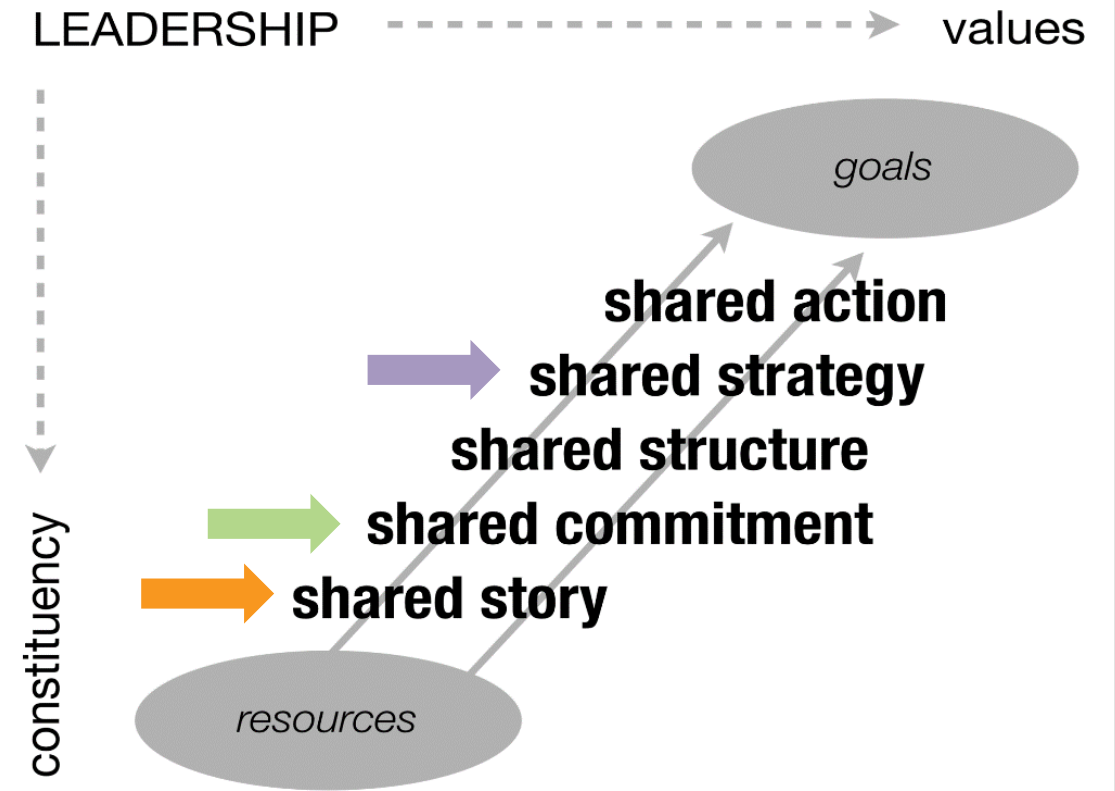
A practice and a framework for *building capacity* to make change.

Organizing enables a *community* to be transformed into a *constituency* that is mobilized towards a *common goal*.





Leadership is accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty.



Leadership Practices

# STORY

- **Organizing Statement**
- **Public Narrative Worksheet: Story of Self, Us, and Now**
- Motivating Vision
- Coaching Packet

# COMMITMENT

- **Map of Actors**
- Actor Analysis
- 1:1 Worksheet
- Organizing Statement
- Community Readiness Assessment
- Community/Coalition Charter
- **Shared Motivating Vision**

# STRUCTURE

- **Team Diagnostic Checklist**
- Team Purpose, Roles, Norms Worksheet
- Team Re/Launch
- Action/Accountability-driven Agenda Templates
- Snowflake/Interdependent Leadership Chart
- Coaching Packet

# STRATEGY

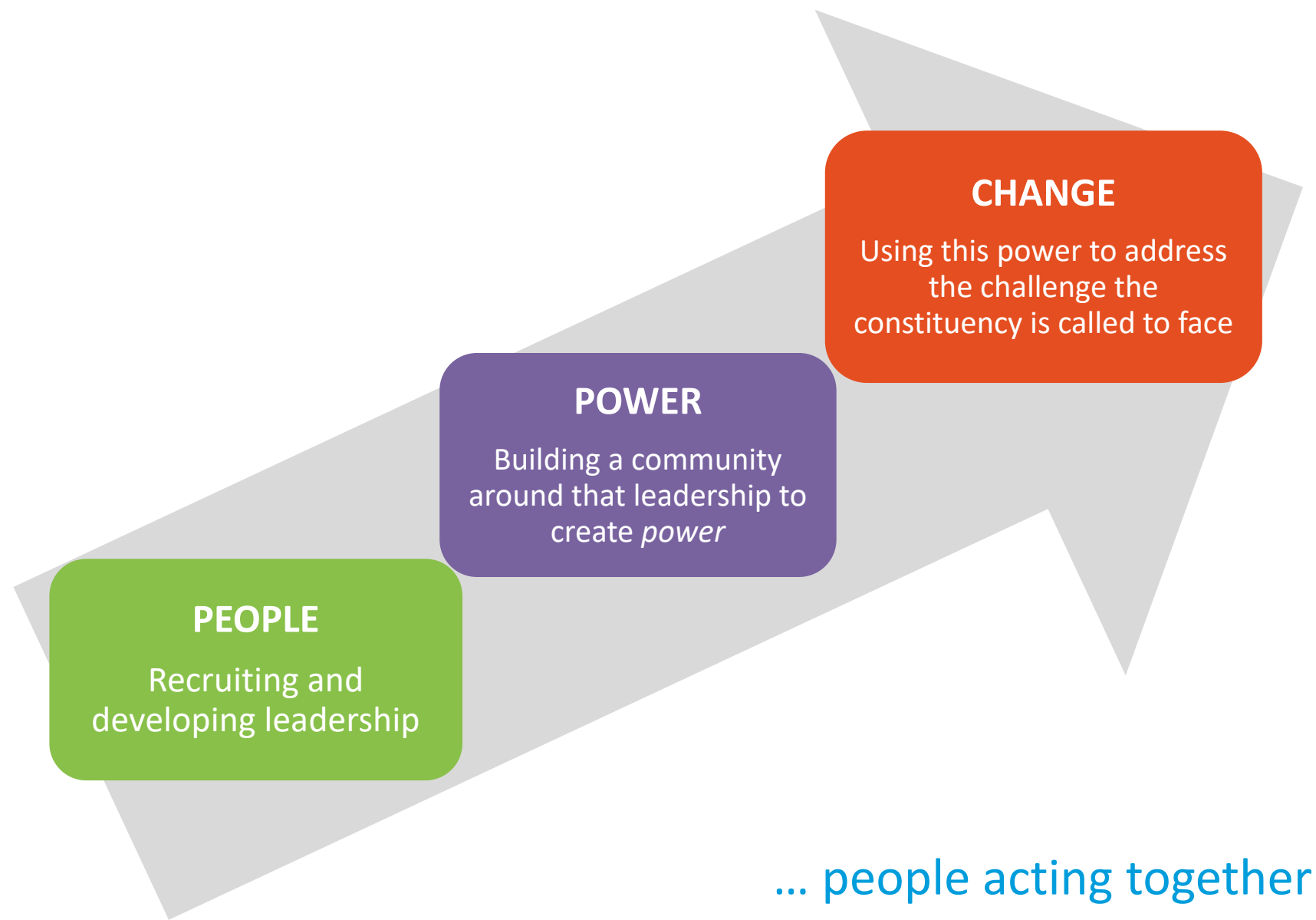
- Organizing Statement
- **Map of Actors**
- Actor Analysis
- Power Analysis
- **Campaign Timeline**
- Tactics Evaluation
- Snowflake/Interdependent Leadership Chart

# ACTION

- Campaign Timeline
- Organizing Statement
- Tactics Evaluation
- Action/Accountability-driven Agenda Templates
- PDSA
- Before Action Review (BAR), After Action Review (AAR)
- Celebration

# Toolbox

# Organizing Theory of Change

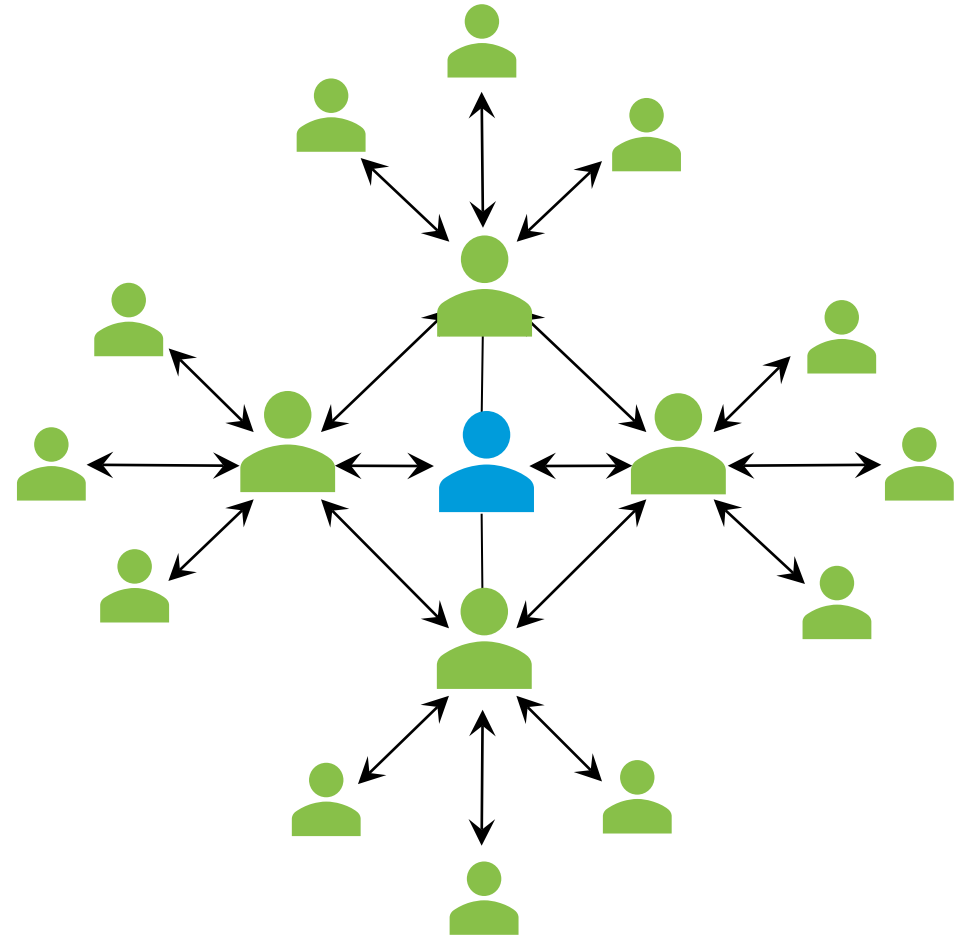


... people acting together  
to change the status quo

Change  
begins when  
you ask others  
to **join you**



Isolated, not sure if you  
can change anything



Organized, Interdependent  
Building Power & Capacity

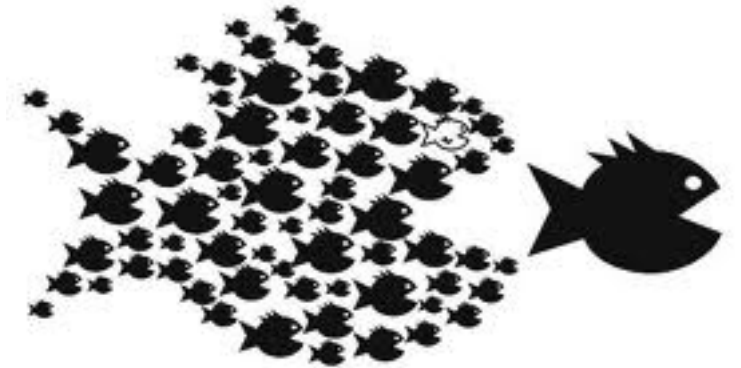
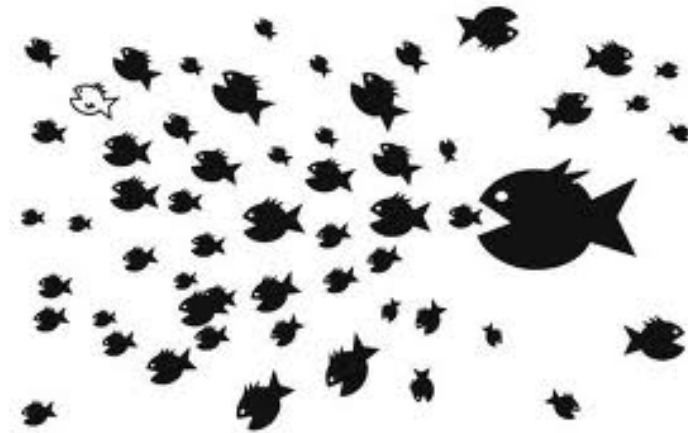
# People Power Change

Reed (2008) suggests that society fosters the privatization of pain.

- **Isolation prevents people from understanding shared self-interest with others** – it keeps our problems private and personal.
- **The problems that people regularly face** (*physical/mental health, crime or lack of safety, lack of education, debt, divorce, unemployment, job dissatisfaction, death, community deterioration, incarceration, etc.*) **are typically experienced as private pain.**
- **As long as pain is privatized and kept personal, citizens are isolated in our experiences of hardship.**
- **We are also isolated in our attempts to make change, and that isolation prevents us from operating with power.**

# What is Power?

The ability to **achieve purpose**  
The ability to **grow in capacity**





# What kind of Change?

- **Specific:** You can **Measure** it.
- **Concrete:** You can **see, feel, hear, taste** it.
- **Significant:** Shaping the world you live in now and into the future. **Making a REAL difference in people's lives** – in **your** life.
- **Lasting & Regenerative:** Improves our shared experience – the human condition. **Not just a quick fix** that will need to be fixed again in a short period of time.

# What Organizing *isn't* . . .

**Selling/  
Marketing:**

*If we market this concept/service, people will want it*

**Charity/  
Advocacy:**

*If we act on behalf of others, they will benefit*

**Innovation:**

*If only we implement this innovation, it will “fix” the problem (fix v. solution)*

**Awareness  
Raising:**

*If only they were informed, they would change their behavior*

**Legal Action:**

*If we take it to court, they will be forced to change*

**Activism:**

*If only we demonstrate, they will stop what they're doing*

**Mobilizing:**

*If we turn out in great numbers, they will get our message*

**Governance:**

*If we mandate it, we will fix the problem*

**Dialogue:**

*If we hold listening sessions, we can fix it for them*

**Though, you may employ any or all  
of these tactics in organizing**

# Choose the focus for your Practice Today

What HTP measure/s do you want to focus on today?

- (1) SW-RAH1 - 30d All Cause Readmissions
  - (2) SW-CP1 - Social Needs Screening and Notification
  - (3) CP1 - Readmissions for high frequency chronic conditions
- 
- Which measure/s are you having the hardest time engaging your community around and/or getting *meaningful* engagement?
  - What topics might you be exploring in your next CHNE meetings?

# Wellness Break 10 min



# The Organizing Statement

Worksheet Packet p.11

We are organizing (WHO - constituency)

to do (WHAT - measurable aim)

by (HOW - tactics)

in order to (WHY - motivating vision)

by (WHEN - timeline).

# The Nightmare vs The Dream

- What is the intolerable condition that we want to end or avoid?
- Why is it urgent now?
- What is at stake?
- What will happen if we don't act?
- What could happen if we do?





# Motivating Vision

moving from the world as it is to the world that could be

The **Nightmare**

The **Dream**



What Challenge are we Facing?

**What happens if we do nothing?**

How will the world look different if we make a change?

# Clear & Compelling Motivating Vision



Worksheets 1 & 2 (pp. 11, 12)

**TIME:** 5m

**GOALS:**

- Familiarize yourself with the Organizing Statement as a strategy tool
- Review the components of an Organizing Statement to begin to get clear on your collective goal and the strategies you'll use to meet that goal

**AGENDA:** *Individual Work*

1. Choose the measure you'll focus on
2. Use worksheets 1 and 2 to get clear on what you're working on, why it matters, who is/needs to be involved, and tactics you're using

## PRACTICE ACTIVITY #1: Organizing Statement

# Coaching the Organizing Statement

**When the work is not progressing as desired, ask:**

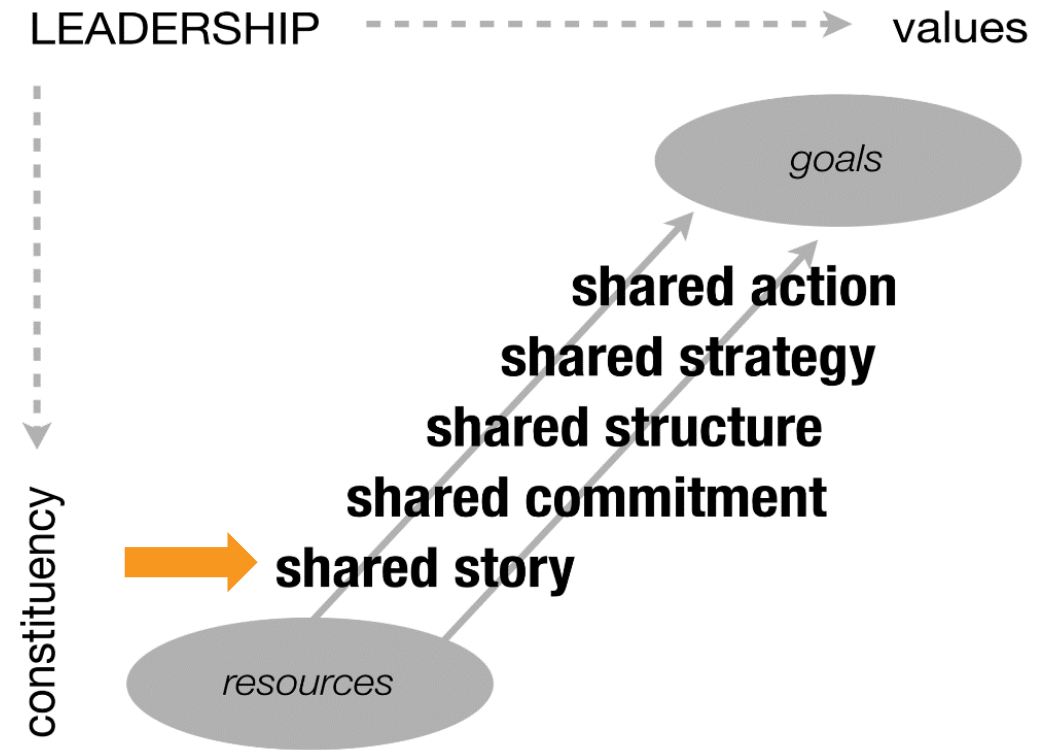
- Is it a strategy issue (the head of the work)? Revisit the Who and What
- Is it an action issue (the hands of the work)? Revisit the How/Tactics/Interventions
- Is a motivational issue (the heart of the work)? Lean on your Motivating Vision
- Without the heart, heads, and hands all involved – progress will be slower. It takes all 3.

Name	Electronic Template(s) Request						
	Please check the editable templates you would like e-mailed to you						
	Attendance/ Sign-In	Organizing Statement	Map of Actors	Actor Analysis	Meeting Agenda	Campaign Timeline	Other (specify)
<i>Risa Hayes</i>	✓	✓	✓	✓	✓	✓	

## Tools you can use

- Electronic, Fillable Templates
- Use the checklist on your table to let us know which tools/templates you'd like us to send you

Leadership is accepting responsibility for **enabling others to achieve shared purpose** in the face of uncertainty.



**Leadership Practices**



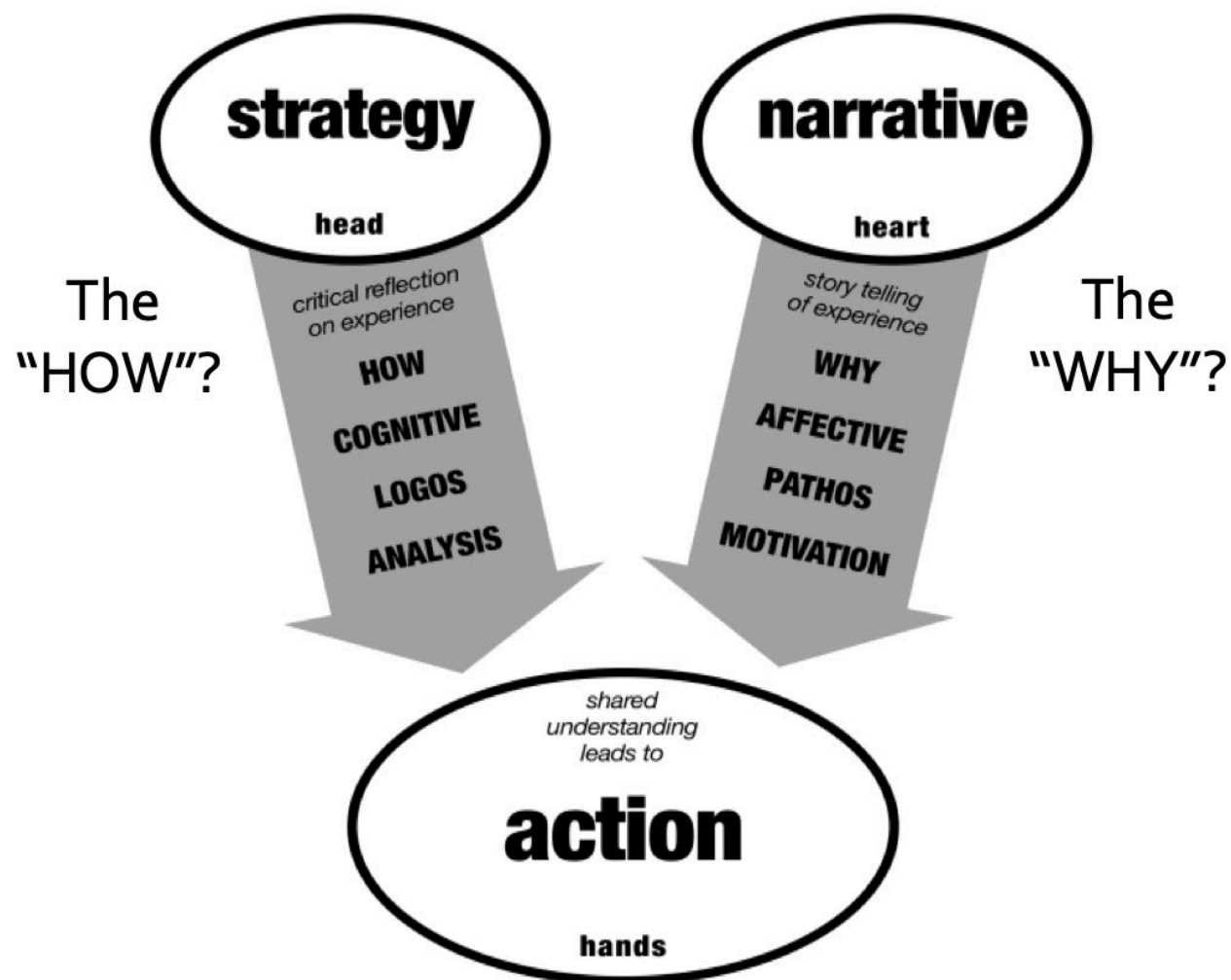
# The 3 stories every leader must tell

If you don't tell your story, someone else will . . .

# The Art & Skill of Public Narrative

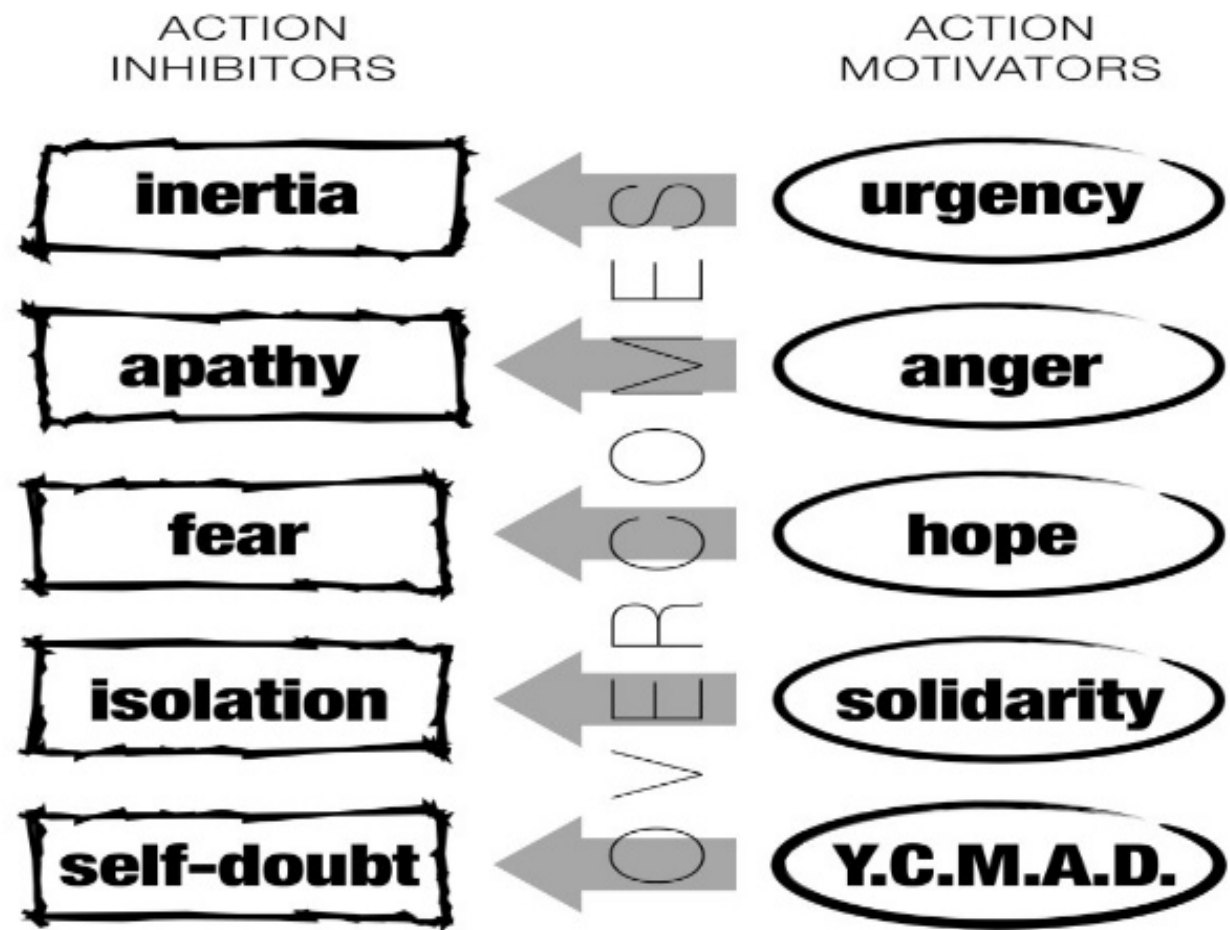
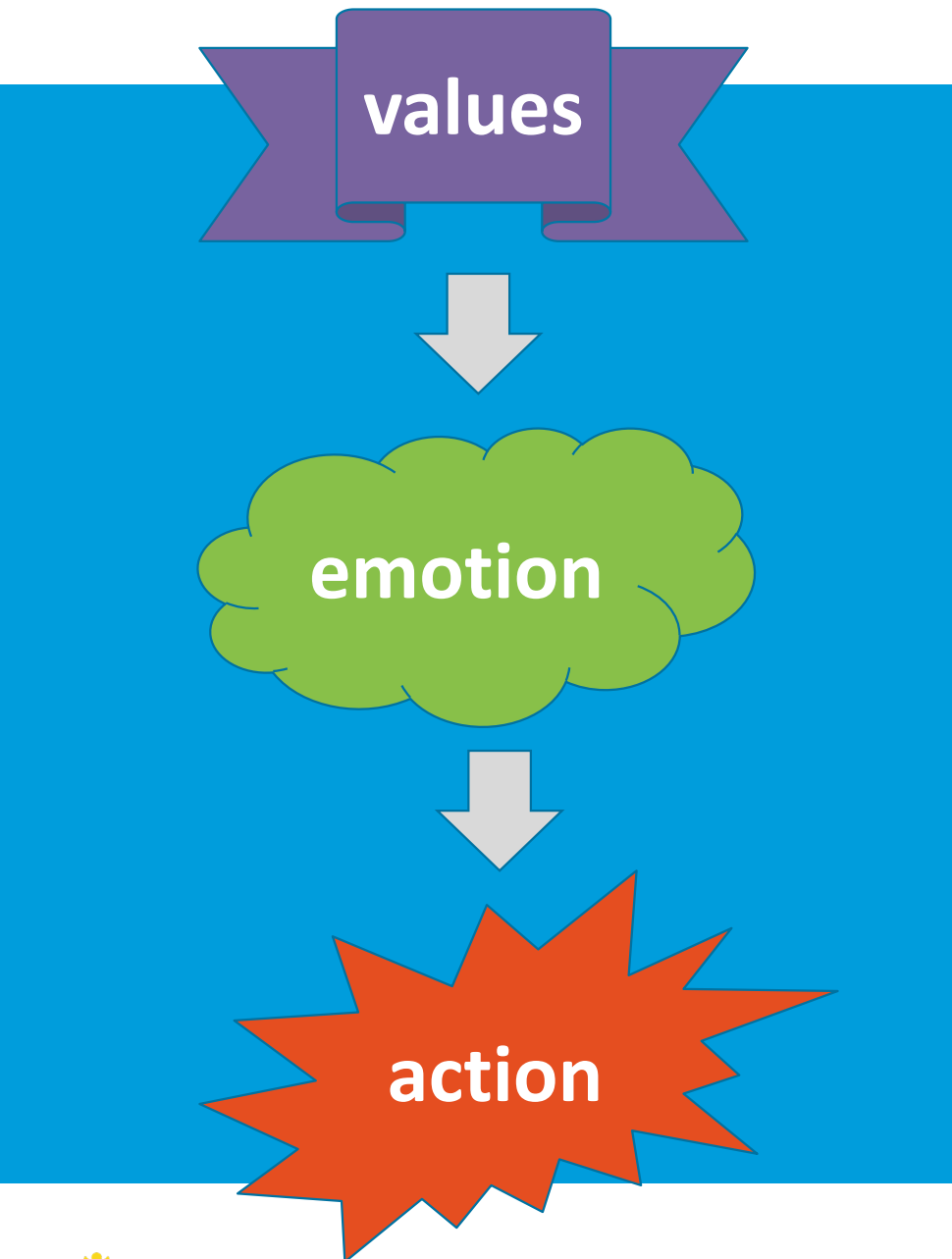


Why is Story Important?



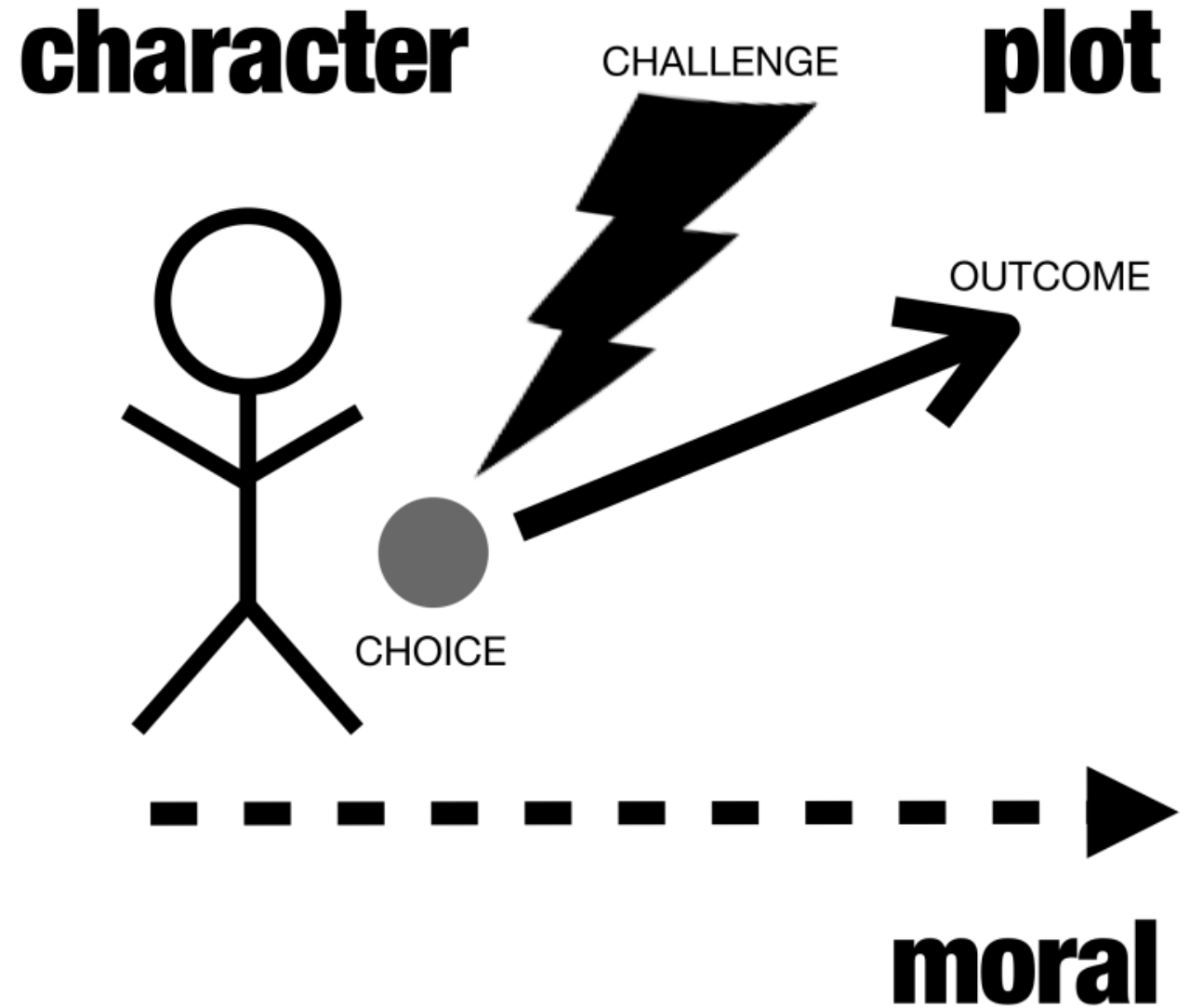
...you need both to inspire effective action.





# Telling the Story of Self

Why am I called to do this?  
What was/is my challenge?  
What choice did I make?



Worksheet #4 (p. 19)

**TIME:** 10m

**GOALS:**

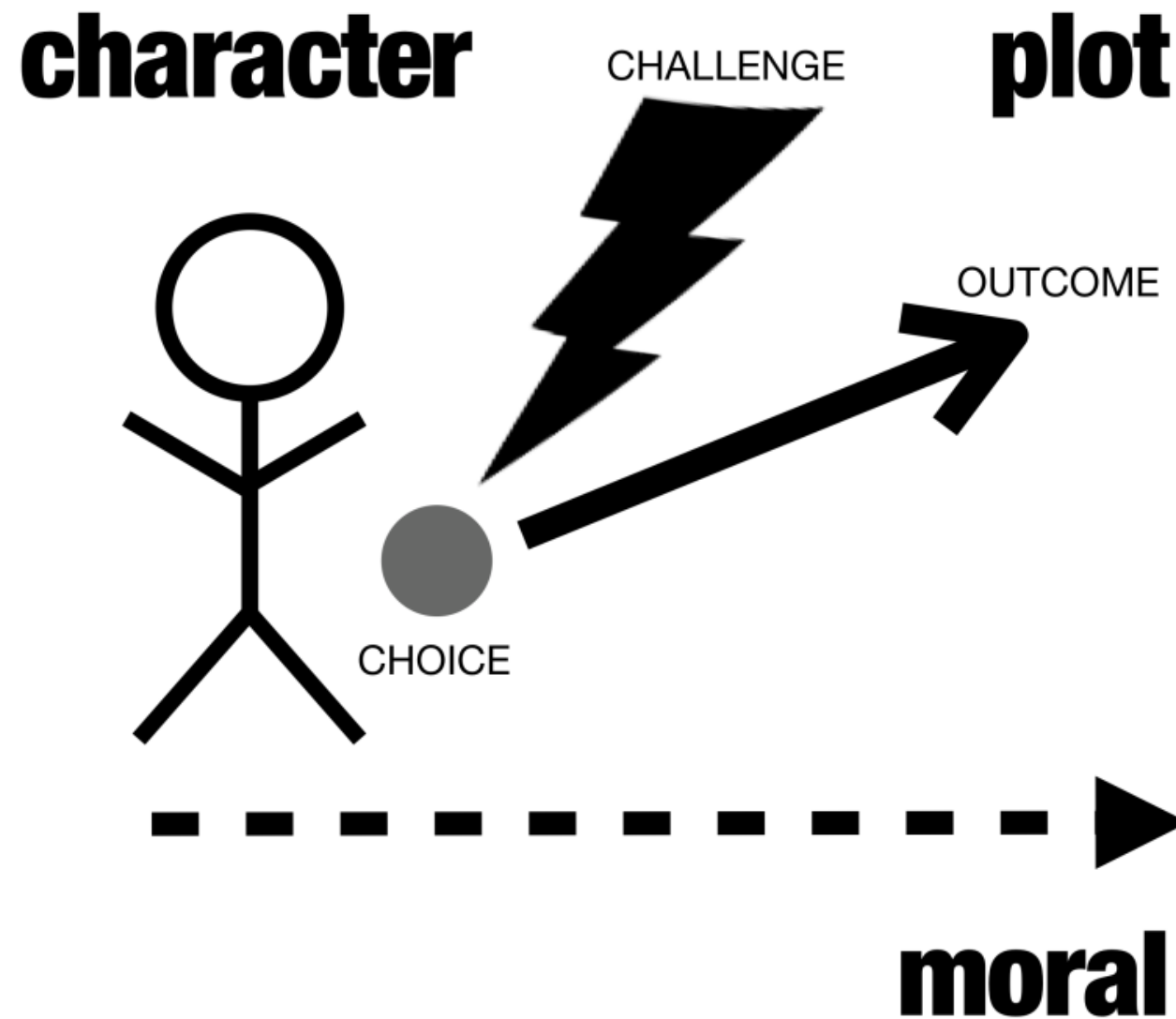
- Find Your WHY – why do you care about this work/this measure?

**AGENDA:**

1. Use the **worksheet #4 on p.19** to explore/identify your own values, motivations, and motivating vision
2. Begin to think about how you might convey those to others
3. Gather for Debrief

## PRACTICE ACTIVITY #2: Find Your Why

# What Makes a Story?



A **compelling**  
story comes to  
**Life**

- specific **names**
- specific **images**
- specific **sounds**
- specific **smells**
- specific **moments**



## Ask Yourself and/or Listeners:

- **When did you feel something? What resonated?**
  - What images brought the story to life?
  - What kind of values and emotions did it evoke?
  - When did you connect with the story teller?
  - Do you know why they care, personally?
- **Did you hear a challenge? And a choice?**
  - When explicitly? How could each be made clearer?
  - What was their challenge? What was their choice?
  - What called them to take action? To Lead?
- **Was there a specific call to action?**
  - Is there a narrative bridge between the nightmare and dream?
  - Do you want to join them in action?
  - Is there a plausible path forward, together?

# Coaching Story of Self

# Modeling Story of Self: Meredith

Worksheet #5 (p. 21)



- What did you connect with?
- What values did you hear?
- What details or images caught your attention and also reflected those values?
- What challenge/s, choice/s, outcomes did you hear?
- Is the storyteller asking/inviting you to make a choice?

Use the worksheet to jot down what you're hearing in the story

Challenge	Coaching
"I don't have a story" aka ( <i>I don't think my story is good enough</i> )	Everyone has a story! Ask curious, investigative Qs: What really matters? Why do you care? When did it start? Did you have a role model? What happens if you do nothing?
Focuses on Issues (like a speech), Avoids a PERSONAL story	Shift away from Philosophy/Sermonizing to the <u>Personal</u> – “why does this matter to YOU, personally?” or “How can you connect w/Audience? vs Lecture?”
Tells someone else's story, Avoid own	Ask for their perspective or experience of the situation. Either a past nightmare OR the hopeful vision of the future.
Lost in the Abstract/Theory	Ask for their own experience. Shift focus back to “why do YOU care?” or “why does this affect YOU?”
Heavy on the Rant or Nightmare	Ask what their hopeful vision of the future is. Remind them that we are working together now to change it.
Recites biography/CV/resume	It's not about your qualifications, interests, or skills. Ask them, “Why they care?” or Why 5 times

# Common Challenges



## Practice Activity #3 (p. 22)

**TIME: 30-35m**

**GOALS:**

- Draft your story of self and call to action
- Practice telling your story of self and receiving coaching from your Triad Mates
- Listen to your Triad Mates' stories of self and practice coaching them

**AGENDA:**

1. Build on Worksheet #4 (Finding Your Why) to begin to draft your Story of Self
2. Practice telling your story of self, receiving coaching, and coaching others
  - Round 1: **1 (ST) 2 (C) 3 (TK/coach)**
  - Round 2: **2 (ST) 3 (C) 1 (TK/coach)**
  - Round 3: **3 (ST) 1 (C) 2 (TK/coach)**
3. Gather for Debrief

# PRACTICE ACTIVITY #3: Story of Self

## Ask Yourself and/or Listeners:

- **When did you feel something? What resonated?**
  - What images brought the story to life?
  - What kind of values and emotions did it evoke?
  - When did you connect with the story teller?
  - Do you know why they care, personally?
- **Did you hear a challenge? And a choice?**
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# Coaching Story of Self

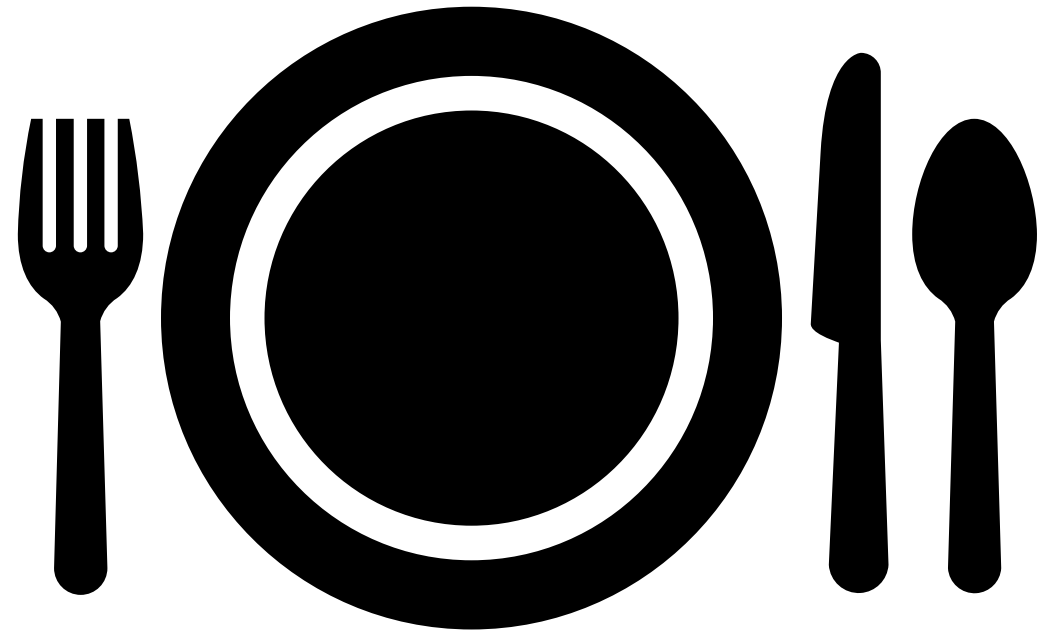


## Debrief

- What did you learn?
- Share stories

# Onsite Lunch **30 min**

Thank our sponsors for lunch today!





# Public Narrative

## Linking stories of Self, Us, Now

Public Narrative is...

a *skill* to *motivate* others...  
...to *join* you in *action*

### Story of Self:

Why am I called to do this?  
What was/is my challenge? What choice did I make?

### Story of Us:

What are the experiences and values that bring us together on this issue?

### Story of Now:

What is the specific choice you are inviting others to make? Why is it urgent?

**Your Call to Action**

# Telling the Story of Us: 'faces' of Us

What are the experiences and values that bring us together on this issue?



**Specific Story:** “Edna was a nurse and her husband, Frank, was a high school principal. They planned and saved well, until Edna had a stroke . . . ”



## Powerful Statistics:

- “99% believe Medicare will pay for their needs.”
- “We can take care of 300 seniors right now; more than 700 are on wait list; 2600 more are in need every year.”

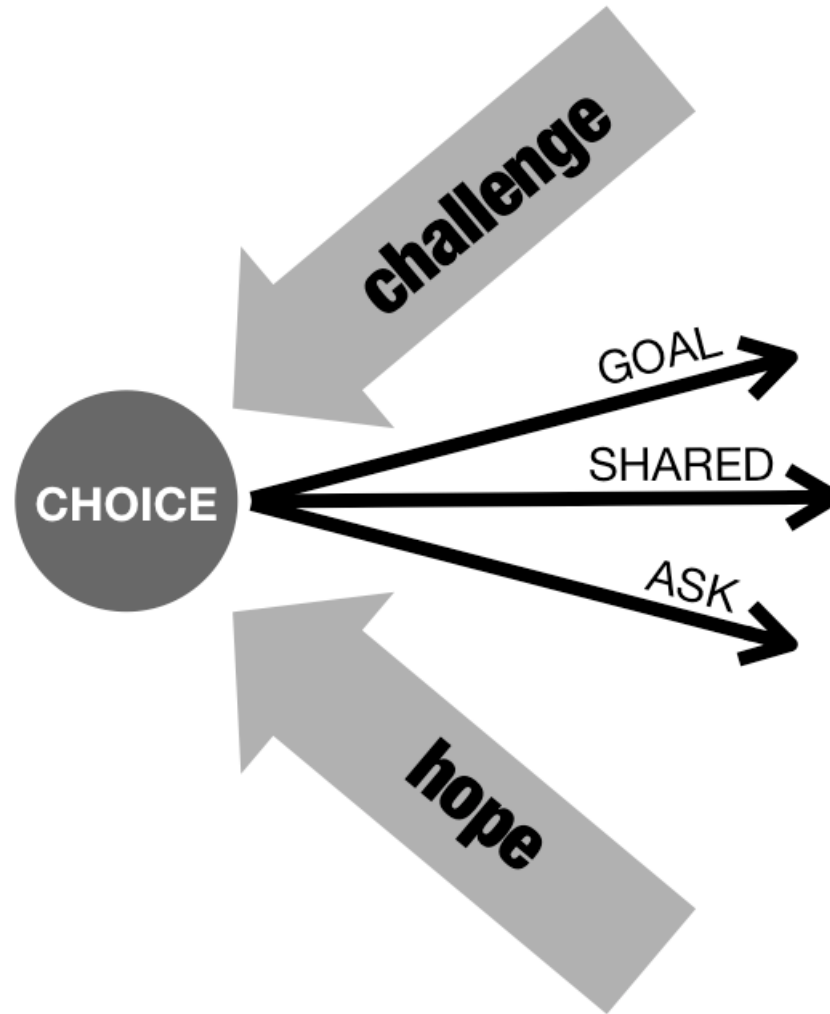


**It could be any of us:**  
“It could be you, your daughter, son, mother, brother . . .”

# Telling the Story of Now

What is the specific choice you are inviting others to make?

Why is it urgent?



## The Elements of a Story of Now

### Challenge (or “nightmare”)

A vivid image of what the future could be if we fail to act now (made real through stories not just statistics)

### Outcome (or “dream”)

A vivid image of what the future could be if we do act

### Choice

A strategic “hopeful” choice that each person in your audience can make right now



# Bringing our Stories to **Life**

specific **names**  
specific **images**  
specific **sounds**  
specific **smells**  
specific **moments**

Don't tell me the moon is shining;  
show me the glint of light on the  
broken glass.

~ Anton Chekhov



# Modeling Public Narrative

Worksheet #5 (p. 21 or on table)

James Croft: <https://www.youtube.com/watch?v=lymvc5d6qxY>

SELF	US	NOW
<i>What are his/her experiences and values that call him/her to lead change?</i>	<i>Who is the "us" that he/she identifies? What are the common values he/she appeals to? How do they do it??</i>	<i>What challenge to those values does he/she identify? What is the strategy to overcome this challenge? What is the first step that each person can take to be part of the solution? Is it clear?</i>

- What challenges, choices, and outcomes did you hear?
- What values does each of those choices convey?
- What details or images caught your attention and also reflected those values?
- What choices is the storyteller asking the listeners to make?

## Ask Yourself and/or Listeners:

- **When did you feel something? What resonated?**
  - What images brought the story to life?
  - What kind of values and emotions did it evoke?
  - When did you connect with the story teller?
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- **Did you hear a challenge? And a choice?**
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- **Was there a specific call to action?**
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  - Do you want to join them in action?
  - Is there a plausible path forward, together?

3 min for story  
5 min for Coaching

- Round 1: **1 (ST) 2 (C) 3 (TK/C)**
- Round 2 **2 (ST) 3 (C) 1 (TK/C)**
- Round 3 **3 (ST) 1 (C) 2 (TK/C)**

**ST= storyteller**

**C= coach**

**TK/C= timekeeper/coach**

# Coaching Public Narrative

**When did you feel something? What resonated?**

- What images brought the story to life?
- What kind of values and emotions did it evoke?
- When did you connect with the story teller?
- Do you know why they care, personally?

- "I really *heard/saw/felt/smelled* \_\_\_\_, when you described \_\_\_\_"
- "I clearly heard your values of \_\_\_\_, when you described \_\_\_\_"
- "I really connected/resonated with \_\_\_\_"
- "I heard your 'why' when you told the story of \_\_\_\_".

- "You could really bring it life describing that sound/what you saw/how you felt when you saw/heard/etc. "
- "How can you tell a story of those values rather than saying you value them?"
- "I'd love to hear more about . . . "
- "I'm still not clear on ..."

**Did you hear a challenge? And a choice?**

- When explicitly? How could each be made clearer?
- What was their challenge? What was their choice?
- What called them to take action? To Lead?

- "Sounds like the challenge was \_\_\_\_, is that right?"
- "I really felt the challenge when you described \_\_\_\_"
- "I really connected with your challenge/choice"
- "I felt inspired by your challenge/choice story."

- "I'm still not clear on your challenge that you faced. What moments/events have felt like a crossroads?" or "What led you to make that particular choice? Did you feel any risk or like you couldn't make any other choice?"
- "I'd love to hear more about . . . "
- "I'm still not clear on ..."

**Was there a specific call to action?**

- Is there a narrative bridge between the nightmare and dream?
- Do you want to join them in action?
- Is there a plausible path forward, together?

- "I clearly heard/felt the nightmare AND a hopeful future when you described \_\_\_\_?"
- "The language you used when \_\_\_\_ was very powerful."
- "I definitely want to join you and I can see where we can make change together."
- "I can really see/hear/feel the path forward when you describe \_\_\_\_."

- "I can hear the nightmare, but I didn't hear a hopeful vision or a path forward – how would you describe that? Can you think of examples here or elsewhere?"
- "The nightmare is very heavy on stats or program language; how can you bring it life? Speak more from the heart?"
- "I'd love to hear more about \_\_\_\_\_ in images/feelings "
- "I'm still not clear on the ASK, can you make it more specific?"

# Coaching Public Narrative

**TIME: 40m**

**GOALS:**

- Learn to integrate your stories of Self/Us/Now
- Draft a Public Narrative with all 3 stories

**AGENDA:**

1. Gather in your Triads
2. Use the [worksheet p.49](#) to draft your Public Narrative linking, us, now
3. Take turns practicing telling your public narrative, receiving coaching, and coaching others
  - Round 1: **1 (ST) 2 (C) 3 (TK/coach)** **ST= storyteller**
  - Round 2 **2 (ST) 3 (C) 1 (TK/coach)** **C= coach**
  - Round 3 **3 (ST) 1 (C) 2 (TK/coach)** **TK/C= timekeeper/coach**
4. Gather for Debrief

## PRACTICE ACTIVITY #4: Public Narrative – Story of Self, Us, Now

## Ask Yourself and/or Listeners:

- **When did you feel something? What resonated?**
  - What images brought the story to life?
  - What kind of values and emotions did it evoke?
  - When did you connect with the story teller?
  - Do you know why they care, personally?
- **Did you hear a challenge? And a choice?**
  - When explicitly? How could each be made clearer?
  - What was their challenge? What was their choice?
  - What called them to take action? To Lead?
- **Was there a specific call to action?**
  - Is there a narrative bridge between the nightmare and dream?
  - Do you want to join them in action?
  - Is there a plausible path forward, together?

6 Minutes for  
Coaching

Coaching  
Public  
Narrative



## Debrief

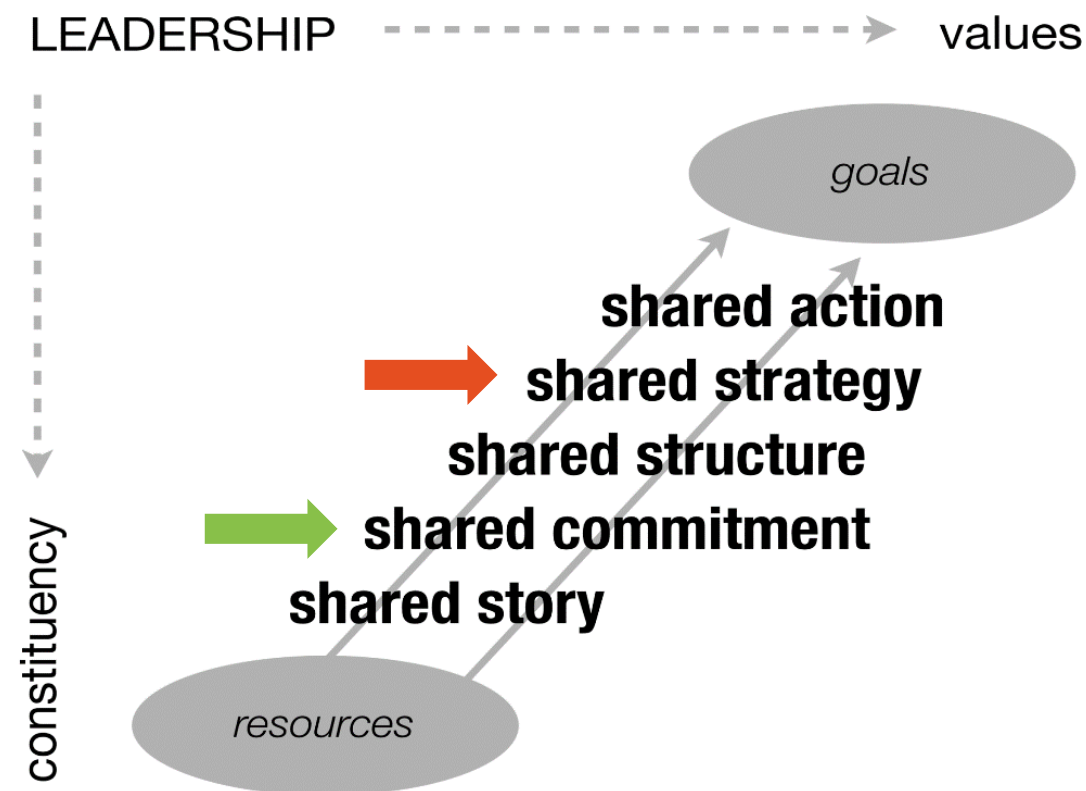
- What did you learn?
- Share stories

# Stretch Break 5m





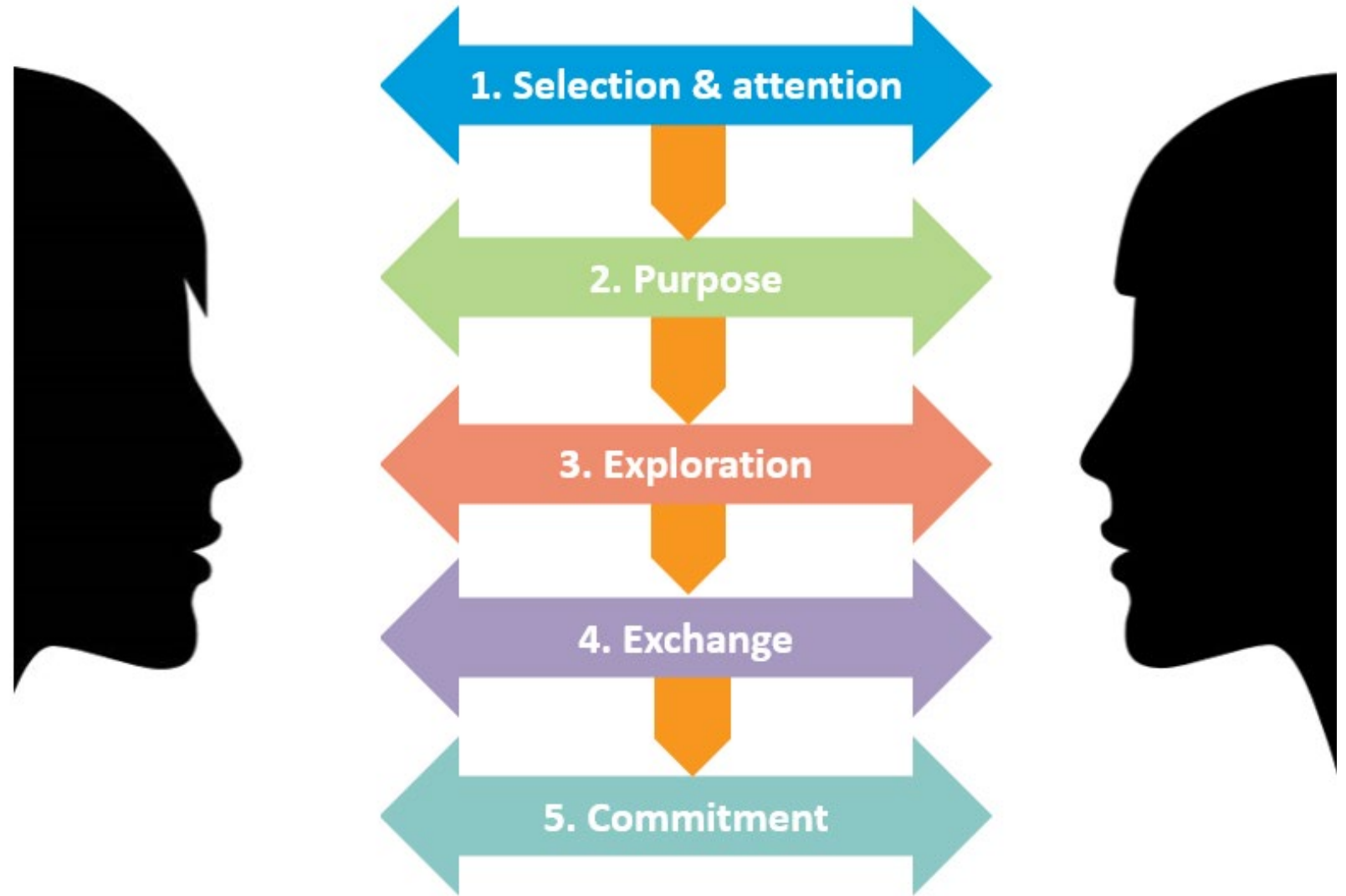
Leadership is accepting responsibility for **enabling others to achieve shared purpose** in the face of uncertainty.



Leadership Practices

# The Art of the 1:1

- Intentional
  - Efficient
  - Thorough
  - Effective



Will you **Join**  
**Me . . . .?**

## Asking for a Commitment



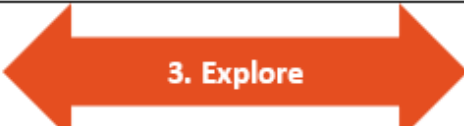

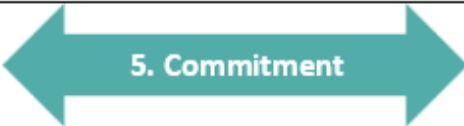
### What makes for a strong “ask”?

- State why it is important
- Paint a picture of what happens if you don’t take action
- Paint a picture of the hopeful future if you do take action
- A specific action are you asking someone to undertake

*BUT . . .*

# Using the 1:1 Structure for Any Agenda

Note: We do have Agenda Templates available and/or that we can help you develop.

1:1 “Step/Component”	Agenda Topic	Clarification/Planning Tip
 1. Selection & attention	<b>Why are we here?</b> <i>I/we wanted to meet with you to explore ....</i>	<ul style="list-style-type: none"> <li>▪ Be explicit about why these attendees were invited</li> <li>▪ What is it about them, in particular?               <ul style="list-style-type: none"> <li>○ Why it's important for them/to them</li> <li>○ Not what you want/need from them</li> </ul> </li> <li>▪ What you think you might connect with them about</li> </ul>
 2. Purpose	<b>Purpose for this Meeting:</b> What we'd like to explore	<ul style="list-style-type: none"> <li>▪ Make sure the “purpose” is not the same as “the ASK” – you need to explore first before you know what and IF you'll ask</li> </ul>
 3. Explore	<b>Topics to Explore/Questions to Ask</b>	<ul style="list-style-type: none"> <li>▪ Share your Story (of self or Full Public Narrative)</li> <li>▪ Let them see you care, what motivates you – they can identify with you</li> <li>▪ Invite them to share why they care, what motivates them</li> <li>▪ Ask them what their vision/dream is (Appreciative Inquiry is great here)</li> <li>▪ Begin exploring ideas they have for how to improve/change, and what actions we can each take</li> </ul>
 4. Exchange	<b>Ideas for Action We Can Take</b>	<ul style="list-style-type: none"> <li>▪ Begin to talk about what resources you each bring to the effort</li> <li>▪ What roles are needed and who can fill them</li> <li>▪ Who else needs to be involved</li> </ul>
 5. Commitment	<b>Action Items and Next Steps</b>	<ul style="list-style-type: none"> <li>▪ Make a strong ask</li> <li>▪ Leave with a clear plan – dates, times, accountability</li> <li>▪ When will you meet again</li> </ul>

Strategy is based on  
turning  
the **ASSETS** we have into  
the **POWER** we need to  
get the **CHANGE** we want

**Our assets come from our relationships!**

# Building Power to Make Change

You & Your  
AIMS



What change do we want?  
What is our interest?

What resources do we already have?  
What other resources might we need?

AND . . . .Who holds resources  
that can help you create the change you want?

## POWER WITH

Sometimes we can create the change we need just by organizing our resources with others, creating power with them. For example, creating a cooperative day care, or a community credit union, or a volunteer service bank.



## POWER OVER

Sometimes others hold power over decisions or resources that we need in order to create change in our lives. In that case we have to organize our own power with others first in order to make a claim on the resources or decisions that will fulfill our interests.



## What kind of power are we building?

- Develop collective power by combining resources to achieve common purpose
- How do we organize resources to give us leverage?

# How do we build power through relationships?



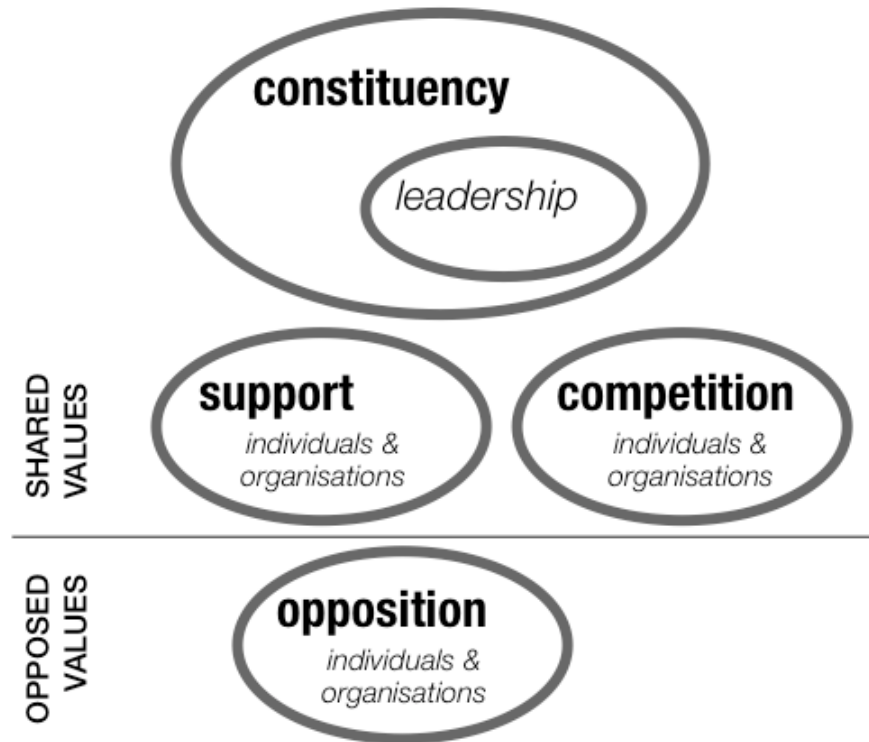


# What is the strategy of building relationships?

## First, we need to understand the players ...

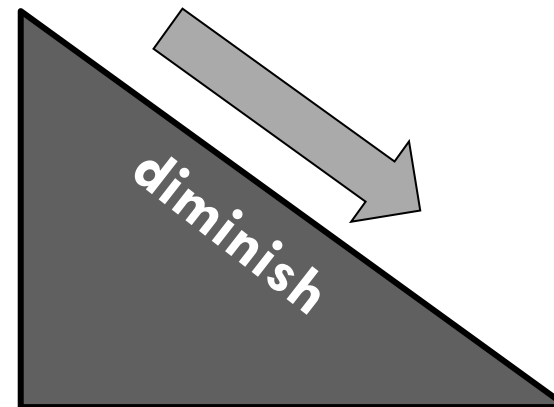
- Map out the actors in this situation:
  - Who is impacted by the current situation?
  - Who is suffering in isolation?
  - Who will be impacted by the change we want to make?
  - Who shares our values & interests?
  - Where can we find support?
  - Who/what are we competing with?
  - Who opposes our goal?

# Our first question is **Who are our people?**



- **Constituency:**
  - who is affected? who is harmed? who benefits?
  - who wants the change?
- **Leadership:** who do you want to help you lead?
- **Support:** may have resources or influence, outside of your direct constituency.
- **Competition:** wants what you want, but is competing for resources
- **Opposition:** opposes your goal and competes for resources

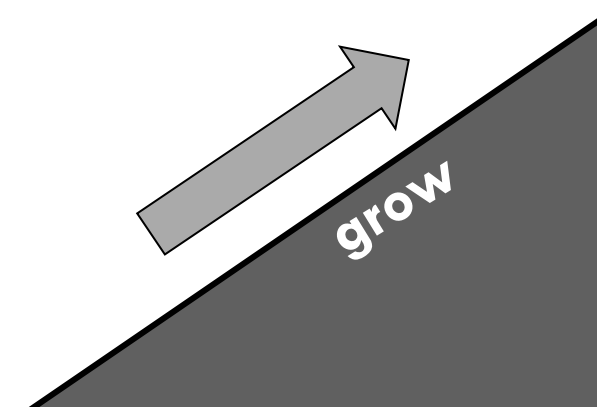
**What are their interests, values & resources?**



### Economic resources

**diminish** with use

- money
- materials
- technology



### Natural resources

**grow** with use

- relationships
- commitment
- discretionary effort

Based on principles from Albert Hirschman, *Against Parsimony*

# What do we mean by Resources & Assets?

**TIME: ~20m**

**GOALS:**

- Begin mapping actors and assets
- Begin building a 1:1 list

**AGENDA:**

1. Gather in your “Community Groups”
2. Use the Flip Charts with the Map of Actors template
3. Write the ‘actors’ on sticky notes (ONE name/org per sticky), listing the resources they bring  
(●=constituent, ●=leadership, ●=supporter, ●=competitor, ●=opposition)
4. Place the sticky notes on the Flip Chart. You may need to duplicate stickies and put someone in more than one category.
5. Gather for Debrief

Practice Activity #5 (p. 38)

## PRACTICE ACTIVITY #5: Mapping Actors & Assets



## Debrief

- Each group report out on your map
- What did you learn?
- What questions did you have?
- What became clearer for you?

# Actor Analysis



## Interests:

- what do they want?
- look at their mission statement
- do they have initiatives/projects?
- who funds their work?
- who do they serve and what are their goals?
- what are their passions?
- what drives them?

## Nightmare:

- Current nightmare they live and want out of?
- nightmare they are trying to avoid?

## Dream:

- What is their motivating vision?

## Our ASK:

- STRONG, CLEAR, based on shared values
- “Will you join me . . . ?”

## Assets:

- think beyond money . . .
- influence?
- connections?
- staff?
- meeting space?
- Programs?

## What they have that we want/that can help us:

- From the list above

## What values do we connect on?

- Where is the common ground?
- Where do we want the same things?

## What assets do we have that can help them address their Nightmare/ Dream/ Interests?

- How can we share our resources to help them address their interests, nightmare, dream?

## Our OFFER:

- based on what THEY want & need (from interests, values, nightmare, dream **NOT** on what we think they *should* have or care about . . .

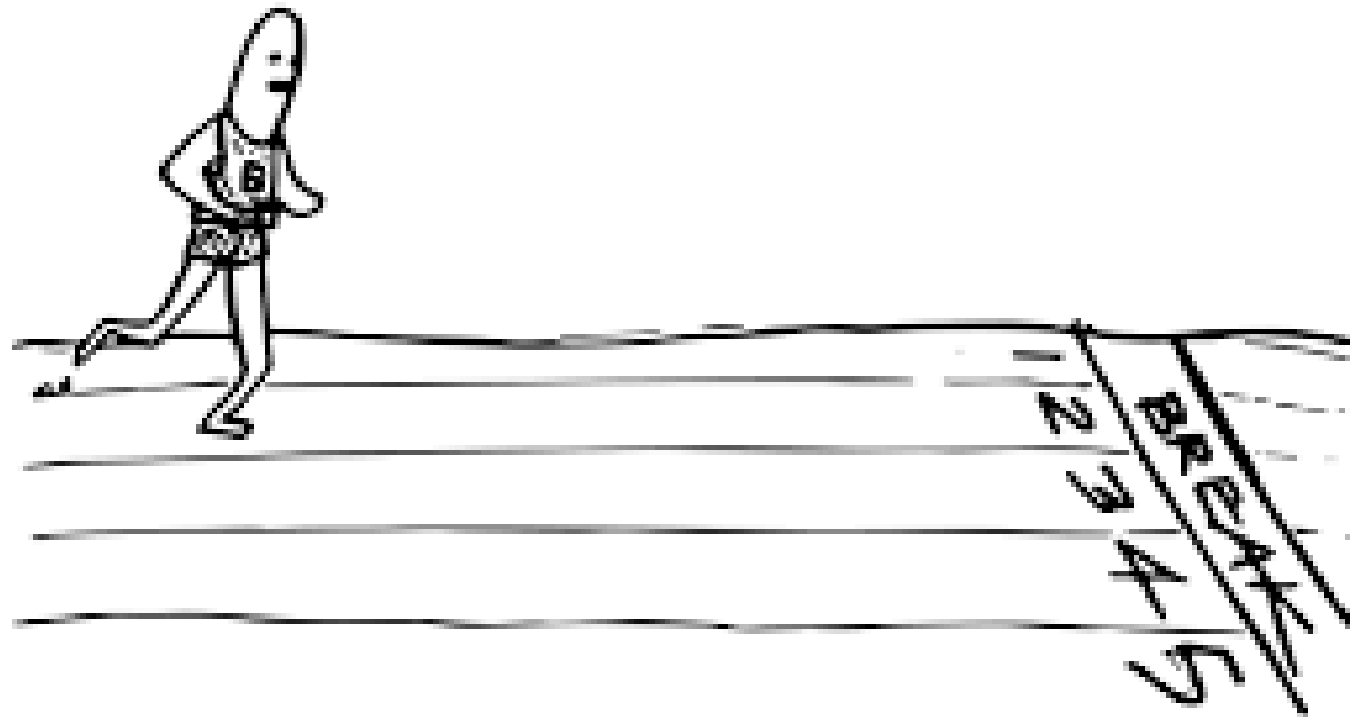
Name	Electronic Template(s) Request						
	Please check the editable templates you would like e-mailed to you						
	Attendance/ Sign-In	Organizing Statement	Map of Actors	Actor Analysis	Meeting Agenda	Campaign Timeline	Other (specify)
Risa Hayes	✓	✓	✓	✓	✓	✓	

## Tools you can use

- Electronic, Fillable Templates
- Use the checklist on your table to let us know which tools/templates you'd like us to send you

# Quick Break 5 min

THE HOME STRETCH!





Once you've mapped your actors, **how do you start connecting with others?**

## Employ Relational Strategies

- Community Engagement Meetings
- Partner Engagement Meetings
- Stakeholder Engagement Meetings
- Public Input Meetings
- Coalition Meetings
- Neighborhood meetings/block parties
- **One-to-One meetings**

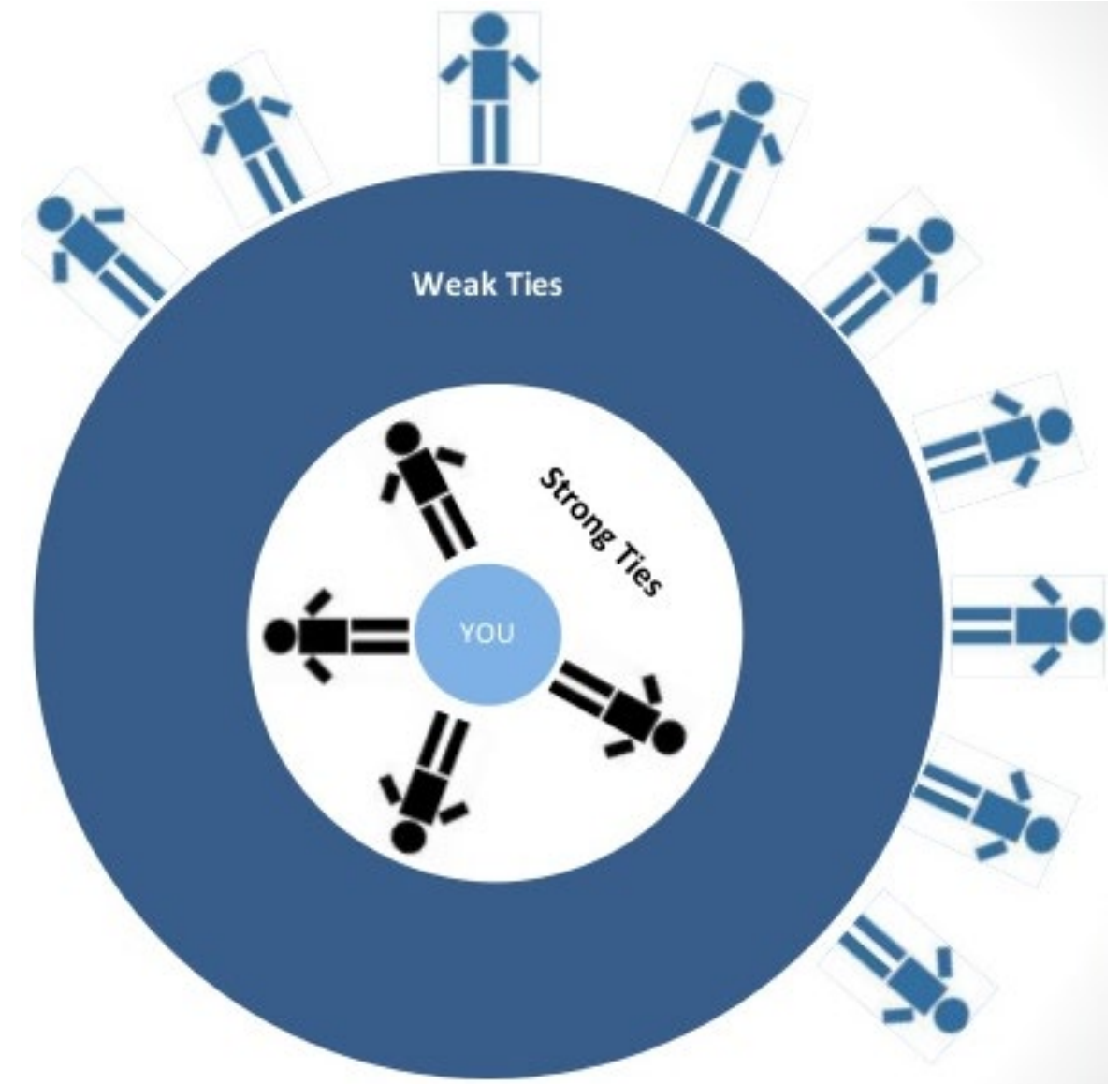
# Who should you Develop Relationships with?

## Strong Ties

Colleagues, peers, friends, family – networks we already know. Source of strength. Less likely to provide new information or connections.

## Weak Ties

Outside of the networks we already know. Provide diversity, innovation, new information and new connections.



Graphic courtesy of LinkedIn

Name	Electronic Template(s) Request						
	Please check the editable templates you would like e-mailed to you						
	Attendance/ Sign-In	Organizing Statement	Map of Actors	Actor Analysis	Meeting Agenda	Campaign Timeline	Other (specify)
<i>Risa Hayes</i>	✓	✓	✓	✓	✓	✓	

## Tools you can use

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Leadership is accepting responsibility for **enabling others to achieve shared purpose** in the face of uncertainty.



Leadership Practices

# Strategy & Tactics

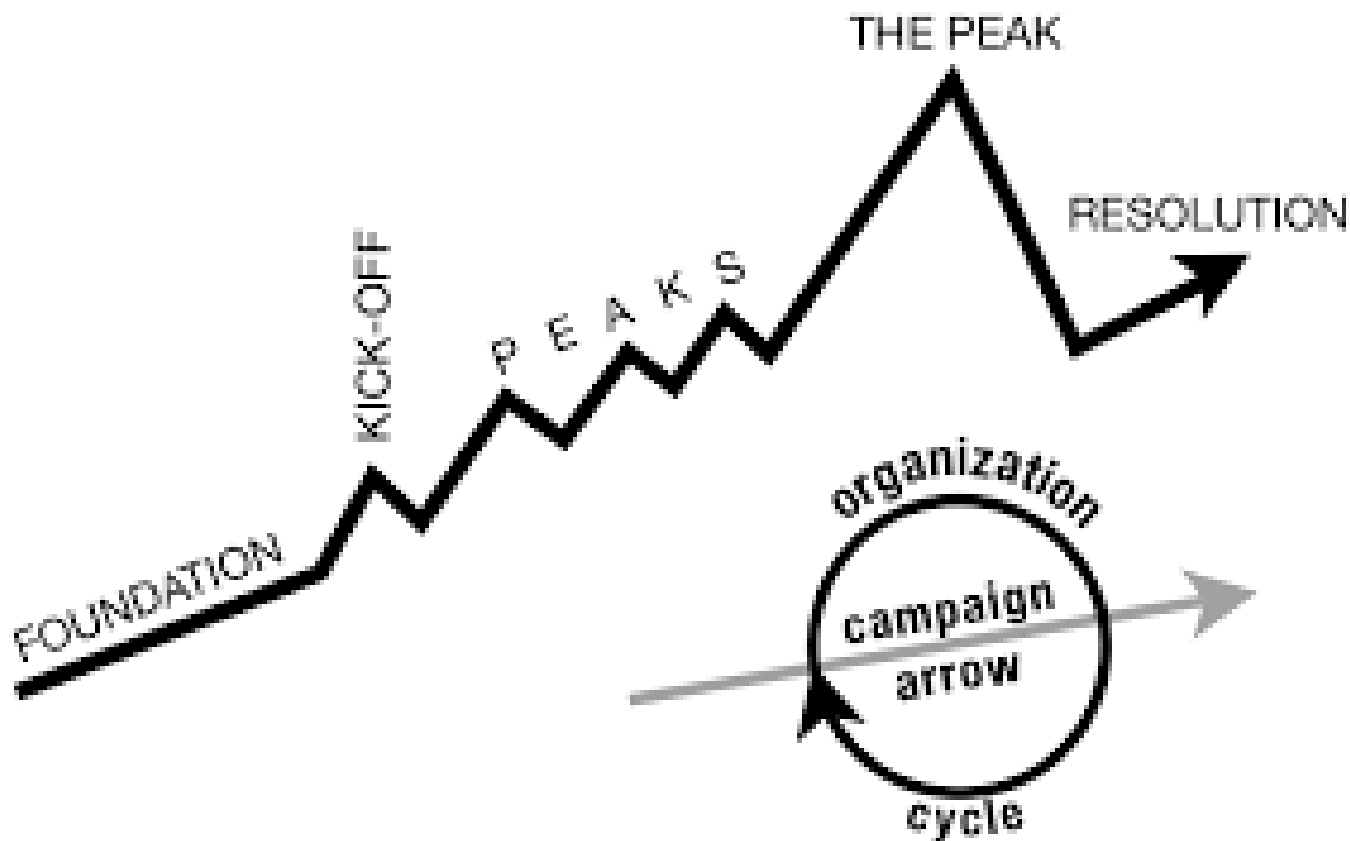
Worksheet Packet p.44



Now you know  
**what** you're  
working for and  
**why** you care ...

- We are organizing (WHO - constituency)
- to do (WHAT - measurable aim)
- by (HOW – tactics)
- in order to (WHY - motivating vision)
- by (WHEN - timeline).

Next, comes the organizing **Strategy**



## The Campaign Timeline

- The flow of a campaign is not a flat line with milestones
- There is an intensity to campaigns with peaks and 'troughs'
- This shows the surges of climbing effort for each of the peak goals and troughs for reflection

Worksheet Packet p.46

# 3 Aspects of Organizing/ Campaign Goals



**#3 Build Capacity** for future efforts and sustainability: *gets better, smarter and more capable over time*

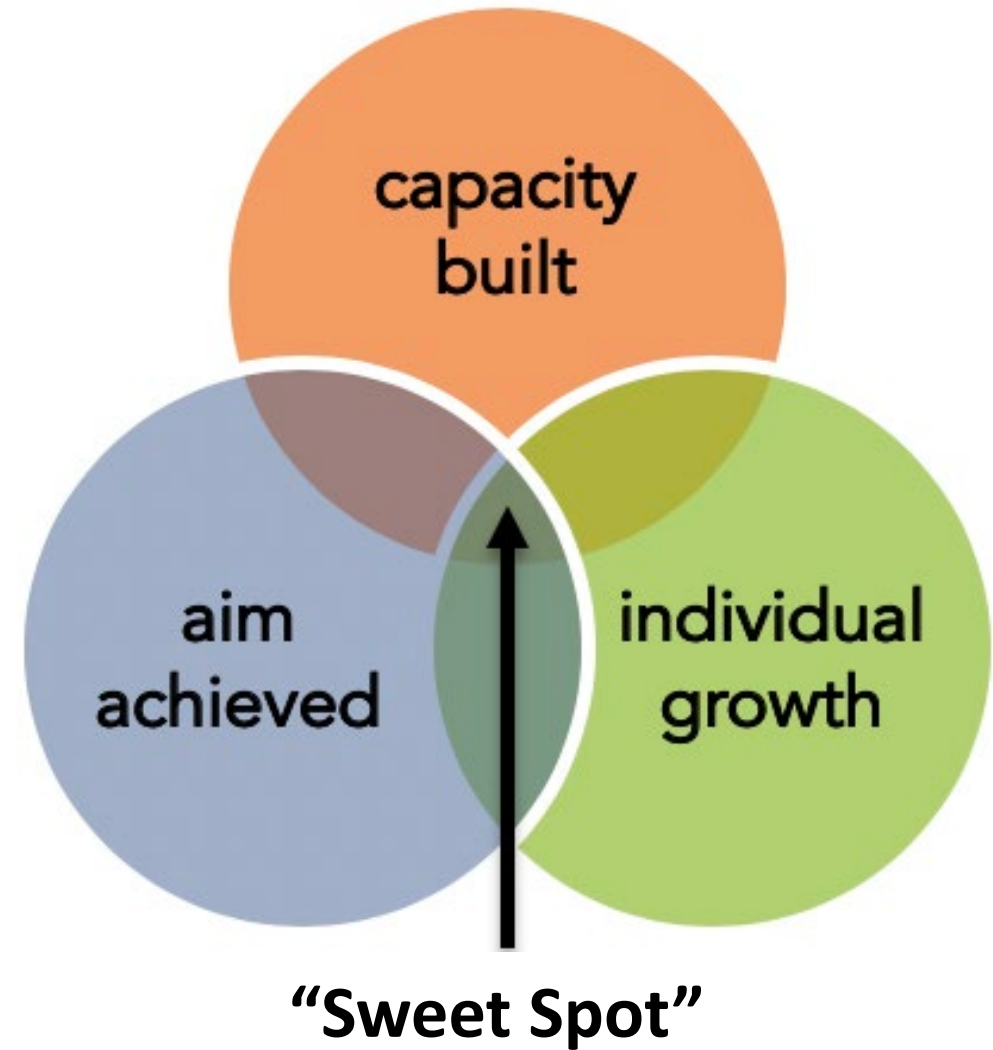
**#2 Develop Leaders** as stewards of the whole as a result of working together

**#1 Achieve Real Outcomes** for those we serve



# The Sweet Spot

- **Strategic:** it results in concrete, measurable progress toward your campaign goals.
- **Strengthens your organization:** it attracts and engages new people; it increases your community's capacity to work together to make change.
- **Develops individuals:** it builds the leadership, skills, and capacity of your constituency.



# Campaign Timeline

Motivating Vision

Capacity (How many?)

Tactics

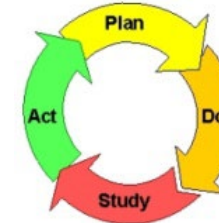
PEAK 1

PEAK 2

PEAK 3

Mountain Top Goal

Foundation



PDSA: Reflection

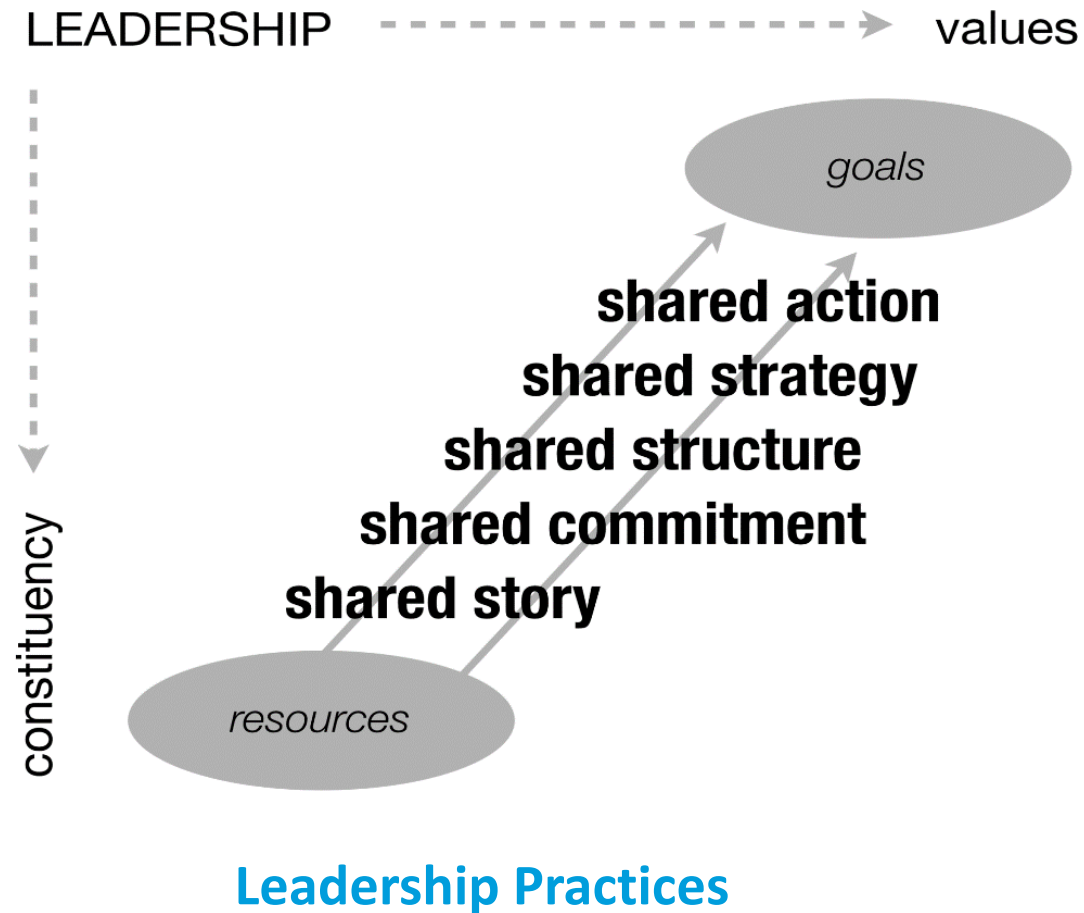
Time (By when?)

Name	Electronic Template(s) Request						
	Please check the editable templates you would like e-mailed to you						
	Attendance/ Sign-In	Organizing Statement	Map of Actors	Actor Analysis	Meeting Agenda	Campaign Timeline	Other (specify)
<i>Risa Hayes</i>	✓	✓	✓	✓	✓	✓	

## Tools you can use

- Electronic, Fillable Templates
- Use the checklist on your table to let us know which tools/templates you'd like us to send you

# Tying it All Together



Review



Q&A



Coaching

# Next Steps

- Using the framework/practices/tools
  - Tools Request Sheet on Table
- Opportunities for practice, coaching, skill development
  - Coalition Building Learning Labs every other Wednesday (next is May 17)
  - 1:1 Coaching ([rhayes@telligen.com](mailto:rhayes@telligen.com), [mkoob@telligen.com](mailto:mkoob@telligen.com))
  - Additional Trainings
- Prep for HTP Symposium
- Please fill out the evaluation



# Thank you for Showing Up!

We did amazing work  
together!

**...IT IS POSSIBLE.**

... it is possible for us to emerge from our time together refreshed, surprised and less burdened than when we came.

...our work together can provide renewal, refreshment and possibilities for what we can do together to create the future that is waiting to be born

...seeds planted here will keep growing and flourish in the days ahead in the service of our work ....

*Adapted from Touchstones used in The Center for Courage and Renewal's Circles of Trust Retreats - Covenants of Presence*

# Thank You for Showing Up!!

## You did great work today!

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