



## PLANNING FOR SUCCESSFUL ENGAGEMENT



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## The Canadian Freshwater Alliance

The Freshwater Alliance is a national capacity building initiative that builds, connects and supports freshwater constituencies across Canada.



## Engagement Organizing

*Engagement organizing mixes the age-old organizing principle of "organize people where they are at", with a new world of tactics and tools that let us do this more effectively.*

## What makes for good engagement?

- Is **\*not\*** solely building awareness
- Goes **beyond** 1-way communication
- Charts a course for a **developing** (and **deepening**) relationship
- Provides opportunity for involvement and **meaningful** contribution.

## 5-core elements for engagement success

### 5 Steps for successful engagement

1. Have a clear theory of change
2. Know who your people are
3. Tell good stories
4. Plan for successful engagement
5. Embrace engagement tools and get creative.

## Step One – Theory of change



- What is your ultimate desired impact?
- How are “people” important to this impact?
- If you do “x” then “y” will result.
- Tests your imbedded assumptions.

## Step One: Theory of change Case Studies

**If we do X then Y will result.**



**If** we bear witness to environmental atrocities **then** more people will be aware of them and we are more likely to stop them.

**Assumption**  
That exposition will be enough to motivate people to action.



**If** we litigate Canada's environmental laws **then** ecosystems will be better off.

**Assumption**  
That our laws are strong enough to drive real impact when implemented.



**If** we raise awareness on Indigenous Treaty Rights **then** rights of First Nations people will be upheld.

**Assumption**  
That raising awareness will lead to action.

Your Organization/Program initiative

**If we do X then Y will result.**

**What assumptions** are you making with your theory of change?

## Step One: Theory of change Practice

**If we do X then Y will result.**

- 2 minutes individually
- 5 minutes in roving shares
- 5 minutes debrief

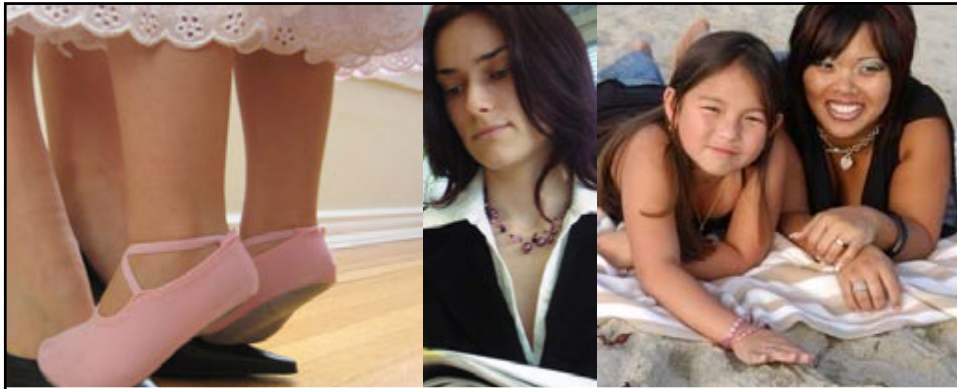
## Step One: Theory of change

### Conclusions

- ToC is the **foundation** for strategic planning
- ToC is a **roadmap** with a GPS
- A powerful **communication** tool
- The **final destination** is the anchor point
- Always challenge your **assumptions**
- You can't succeed if you're not **measuring your true impact.**

## Step Two: Know your 'people'

- Who are your people?
- Where will you find them?
- Who do you most need to reach for your theory of change?
  - 15% of the population are our choir
  - Only 5% of the population reject completely
  - 15% of the population are largely oblivious
  - Leaving, 65% of the population who are persuadable to our environmental causes and messages of sustainability



**But they are busy and distracted!**




## Step Two: Know your 'people' Case Study

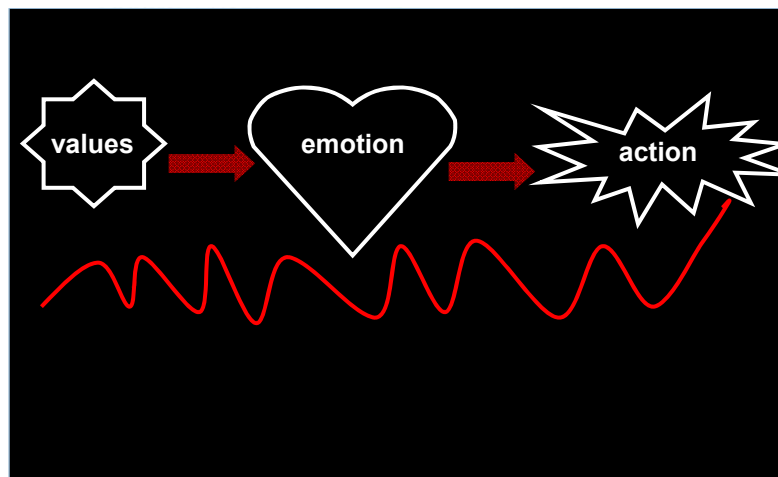


- Pride and responsibility!
- First ads appeared at a football game.
- Willi Nelson spokesperson
- Stories of cowboys
- Targeted outreach

## Step Two: Know your 'people' Practice

- Spend some time defining your constituency.
  - What values do you share? This is your entry.
    - Central Values in Canada include: freedom, security, equity, tolerance.
  - What is it exactly that you want them to do?
  - Why would they support you?
  - Why would they not support you?
  - Where do you find them?
- What is the story you are telling them?
- Don't expect them to come to you... 

## Step Two: Tell good stories



## Step Three: Tell good stories

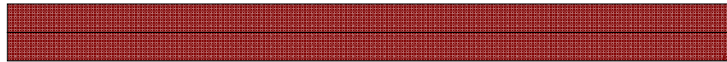
**Storytelling is a practice of leadership.**



**Each of us has a compelling story to tell.**



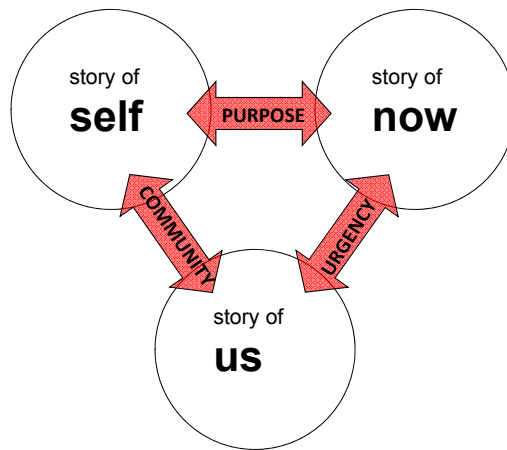
**The key to storytelling is understanding that values inspire action through emotion.**



**Ganz Method of Public Narrative**

## Step Three: Tell good stories

### Ganz Methodology





## Step Three: Tell good stories

### Case Study



## Step Three: Tell good stories

### Practice

1. **Your personal inspiration** – why do you do the important work you do?
2. **From personal to professional** – what is it about this community that would inspire people to join your efforts?
3. **Urgency** – why do you need people to join your efforts NOW?!?



## Step Three: Tell good stories

### Conclusions

- We can all be **storytellers**.
- There is an equation for good stories that drive impact: **values + emotion = action**.
- Facts, figures and data are NOT your lead for good stories – they can **support good stories**.
- Your **personal story** matters!
- Stories should be **front and centre** to your engagement communications.
- **Practice**, practice, practice.

## Step Four: Plan for engagement success



## Step Four: Plan for engagement success



- Charts a developing relationship with someone who is interested in the same outcome as you!
- Can facilitate segmentation of your communications.
- Identifies opportunities for deepening engagement.
- Includes FUNDRAISING!!

## Step Four: Plan for engagement success Case Study



## Step Four: Plan for engagement success Practice

**Take your members on a journey to engagement.**

1. Brainstorm what your core “point of entries” are.
  2. Choose one of these point of entries and chart a course of what engagement might look like for them. You can do this by using the question “....and then what?”
- 5 minutes individually
  - 10 minutes in teams
  - 5 minutes debrief

## Step Five: Utilize engagement tools



Your database will become your best “engagement” friend.

## Step Five: Utilize engagement tools

- Your CRM – contact relations management (aka. Your database)
- Social media
- Mapping technologies
- Canvassing tools
- Evaluations, project management tools
- Telephone or virtual town halls

## Step Five: Utilize engagement tools

### Case Studies

#### Telephone Town Halls

You can use a telephone town hall to:

- Mobilize supporters to take action
- Raise awareness
- Share important information
- Support fundraising
- Solicit feedback
- Set the record straight
- Raise profile

Your audience speaks with you directly through a moderated Question & Answer, respond to survey questions, provide feedback, and most importantly, feel intimately included in a conversation with you.

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## Personalized engagement coaching

- **Plan for impact**
  - Develop your Theory of Change
  - Build a robust business model
  - Create and evaluate impact measures
- **Strengthen your communications**
  - Identify your audiences
  - Conduct a communications audit
  - Engage traditional media
  - Amp up your social media
- **Engage your persuadables**
  - Power mapping
  - Develop a compelling story
  - Implement a dynamic engagement pyramid
  - Recruit and retain volunteers
  - Manage and mobilize your constituents
- **Build your donor base**
  - Develop your fundraising strategy and package
  - Cultivate grassroots and sustaining donors
  - Create successful grant proposals

*Don't see what you need?  
We may still be able to help, contact us for more details.*

## Thank You!



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