

Communicating Up, Down and Out Into the Field
June 1, 2016

Session Objectives

By the end of the convening all participants will:

- Understand their communications strengths, weaknesses and areas where their peers can be a resource
- Be better equipped with strategies to communicate with their colleagues and leadership
- Know the three key messages they need to convey and have a plan to deliver them
- Set communications goals to achieve before the next convening

| Time | Session | Session Breakdown | Details | Materials/Notes |
|--------|-------------------------------|--|--|-----------------------|
| 8 | Breakfast | | | |
| 9-9:30 | Welcome, Introductions, Norms | 9-9:05 Welcome, introduce Heidi | Jana/Lori welcome everyone, introduce Heidi as the facilitator for the day | |
| | | 9:05-9:10 Welcome and Heidi introduces herself | Heidi gives a brief overview of background, experience | |
| | | 9:10-9:20 Group introductions: | <p><i>You all know each other, so I don't want to waste your time by having you introduce yourselves to me, but wanted to instead give you a chance to get to know each other a little better. And then have you introduce your neighbor to me instead.</i></p> <p>All participants will introduce themselves by telling a peer about their biggest communications "burning issue." After five minutes of sharing, peers will introduce their partners to me by sharing each participant's:</p> <ul style="list-style-type: none"> 📌 Name 📌 Job 📌 Home state 📌 Burning issue | Flip chart Markers |

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| | | | Heidi will chart the issues and hang on the wall for later. | |
| | | 9:20-9:30 Set norms for the meeting | Start with a few basics: <ul style="list-style-type: none"> • Treat this as a safe space • Put away cell phones • No comment = yes | Flip chart Pre-write 3 |
| 9:30-10:30 | Group activity and Discussion: Identifying communication strengths, weaknesses | 9:30-9:50 Discussion | Heidi leads group discussion: <ul style="list-style-type: none"> • What does it mean to communicate? To engage? • Who do you need to communicate with? Why? | Slides Flip chart Markers |
| | | 9:50-10:10 Self reflection | Everyone moves to the wall where they complete individual flip charts answering these questions: <ul style="list-style-type: none"> • What is your communications strength? • What is your biggest communications challenge? • What was your most successful communications effort this year? • If you could only improve in one communications area, what would it be? Why? | Individual flip charts markers |
| | | 10:10-10:30 Gallery Walk and partner up | Everyone walks around the room and reviews the other flip charts Encourage people to leave notes for their peers with words of encouragement (“Don’t give up!”), agreement (“I struggle with that too”) and offers to help – with names – on areas where they excel Encourage people to walk through the gallery twice to read other people’s comments, and to add additional comments; talk to one another, select a partner. | Post it notes Markers |

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| 10:30-10:45 | Walking Break | <p>Have everyone select a partner so pairs are either:</p> <ol style="list-style-type: none"> 1. Two people with the same problem 2. Two people who can help one another 3. One person with expertise in an area who can help another <p>Encourage them to spend 15 minutes walking and talking about their burning issues and areas of expertise. Their “entrance ticket” back into the room is to write one thing they learned on the flip chart on the back wall when they return.</p> | | |
| 10:45-12:15 | Discussion & Activity: Communicating up | 10:45-11:15 Discussion on challenges of communicating up | <p>Group discussion:</p> <ul style="list-style-type: none"> • What is communicating up? • What makes it hard? What are the specific challenges? • How does race/gender/age fit into it? • What are the most effective strategies to counter these issues? • What are some scenarios that you have encountered? <p>Heidi charts out the scenarios on a flip chart – group selects one (dot voting?)</p> | Slides Flip charts Markers |
| | | 11:15-11:45 Role Play | <p>Ask for two volunteers – one person is the primary speaker, the other person is the person in authority</p> <p>Describe the scene, talk through the lead-up, say “Action!” and then they role play the scene</p> <p>Ask for feedback when it’s over.</p> | |
| | | 11:45-12:05 Triads | <p>Break the group up into groups of 3</p> <p>Each group selects one of the scenarios on the board</p> | |

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| | | | <p>In five minute blocks, have them each play out the scenario 3x, switching roles – one is primary speaker, one is person in authority, one is observer. After PS and PA speak, observer provides 1 min of feedback.</p> <p>Every five minutes the groups shift roles until all three have a chance to play each role. Heidi will keep time and circulate.</p> | |
| | | 12:05-12:15 Share out | <ul style="list-style-type: none"> • What did you learn? • What are the best strategies? • What worked/didn't work? • What have you learned that you can put into action immediately in your world? | |
| 12:15-1 | Lunch | Unstructured lunch. Encourage them to journal as they eat to document the lessons learned so far. | | |
| 1-3 | Getting the Message Right | 1-1:15 What are you trying to say? | <p>Heidi shares basic guidance on message development</p> <ul style="list-style-type: none"> • 3 key messages • Not too weedy • Sticky messages • Pyramid approach • "Elevator pitch" | Slides |
| | | 1:15-1:30 Who are you trying to reach? | <ul style="list-style-type: none"> • Identifying your audience • Linking your message to your audience • Speaking to them/not over them | Worksheet |
| | | 1:30-2:15 Solo/partner work | <p>Using a worksheet, each fellow works individually to identify their audiences and 3 key messages</p> <p>Don't waste time with wordsmithing</p> | |

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| | | | After 10-15 minutes of solo time, have them pair up to workshop their messages, refine | |
| | | 2:15-3 Elevator pitch | <p>Individually, have each person "role play" their elevator pitch with one person who volunteers to be in the elevator with them, playing the role of their key audience group.</p> <p>Solicit feedback after each pitch</p> <p>Share out on key lessons learned</p> | |
| 3-3:45 | Planning and Setting Goals | Develop a communications plan in response to your burning issue | <p>Remind people of their burning issues from the morning</p> <p>Based on what they've learned/heard/practiced/experienced today, it's time to develop a plan to address the issue "Put out the fire."</p> <ol style="list-style-type: none"> 1. Develop a timeline to identify key milestones/moments ahead 2. Develop an action plan to address issue 3. Develop 1-3-6 month goals to achieve your plan and measure your success <p>Ask for volunteers to share out their goals</p> | <p>Burning issue flip chart</p> <p>Planning template worksheet</p> |
| 3:45-4 | Wrap up, next steps, close | Now what? | <p>Tease out topics for next meeting</p> <p>Final reflections on the day</p> <p>Close</p> | |